



# IMPACT REVIEW 2022/23

The impact of our  
work on the clients and  
communities we serve

**citizens  
advice**

**South Essex**



[citizensadvice-southessex.org](https://citizensadvice-southessex.org)

## THE YEAR IN NUMBERS



**19,789** PEOPLE

Helped with one-to-one information and advice, either face-to-face, on the phone, by email or webchat.

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**53,156** ISSUES

The biggest rises this year were in benefits, debts and people seeking help due to the cost of living crisis.

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**31,115** ACTIVITIES

Including calls to third parties and to clients, emails, letters, face-to-face appointments and actions on behalf of our clients.

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# Chair's Introduction

**I'm delighted to introduce this year's report. This provides not only a means of showcasing our work during the year but also gives an opportunity to thank those who have contributed, either as funders; volunteers; partner organisations; staff and trustees.**

**A**s the statistics on pages 16–17 show the demand for our services is increasing. It is also noticeable that the needs of our clients reveal increasing complexity. We aim to offer a breadth of services and an increasingly diverse range of access channels, including face-to-face interviews, telephone and email help, including support from our South Essex Law Clinic.

Through analysis of the needs in our localities and applications for new funding it has been possible to increase the range of services and the venues in which they are delivered.

In response to the energy costs crisis we have continued to offer a range of specialist energy advice services, for which there has been a significantly increased demand.

Work has been undertaken to add to our physical venues in Rayleigh and in Thurrock, where we now operate from Corringham



**STUART FREEL**

Library and Purfleet Community Hub, along with increased sessions in Grays. We have a new venue in Wickford at the Wick Community Centre. We have re-opened support to Ford Motor Company's employees at Dunton and we now have a weekly session at the Brentwood Foyer funded by Brentwood Community Fund.

As part of an exciting Essex-wide initiative working with and funded by Macmillan we have opened a new service in 2022 supporting the specific advice needs of local residents who have a cancer diagnosis in the family. Unfortunately on top of their concerns about their health many people who have a cancer

**I've chosen the case study opposite as an example of the complexity and extended nature of support needed.**

# CASE STUDY



## **This was a request for support in making a Personal Independence Payment (PIP).**

Client was in his early sixties, married and living in a housing association property with his wife. Both the client and his wife suffer from multiple long term health problems. Client is not in receipt of any benefits due to inheriting money from his wife's mother.

Client wanted support to apply for PIP (a non means tested benefit) because he has long term care and mobility issues.

### **THE SUPPORT PROVIDED INCLUDED:**

- Completion of the application form for the client
- The PIP application was initially declined, as the client scored below the number of points required for both care and mobility. We submitted a mandatory reconsideration in August 2022, this was also declined. This is not unusual, the DWP often don't change the decision at the reconsideration stage.

- We appealed the decision, the client received a call from the DWP in March 2023 with an offer/ provisional decision, and the client was awarded the standard rate of PIP for both care and mobility.

The outcome was that the Client decided to accept the provisional offer and avoid the stress of going to the full appeal hearing prompted by a desire to bring the whole PIP application process, which had taken almost a year to get to this point, to an end.

Client has been awarded £86 per week (which subsequently increased to £95 per week) with this award was backdated to the date of the original application. The back dated amount was £4,472.

**This case study shows not only the need for sustained support but also the need for technical understanding of the PIP process.**

diagnosis struggle financially, for example reduced household income if they have extended time off work for medical treatment. This project makes a massive difference providing specialist casework improving household income and dealing with debts.

We continue to be supported to develop our work by our participation in the county-wide consortium Citizens Advice Essex and we also deliver services in collaboration with our neighbouring local Citizens Advice in the county.

During the year we have been approached by another Essex Citizens Advice serving Braintree, Halstead and Witham, with a view to a merger. In the last few months we have been jointly exploring the benefits and opportunities this might bring and it has now been agreed that the merger will take place with effect from 1st October, 2023. At that point we will take responsibility for service delivery in the Braintree District area and our name will change to Citizens Advice Braintree and South Essex.

I want to thank my fellow trustees for the contribution they have made to the governance of CASE during the year. Especially I would mention Philip Cunliffe-Jones, who has recently stepped down, and I would like to thank him in particular for his extensive legal insights and his earlier service as a Trustee of the former

**“I would like to end by thanking our volunteers, staff, including the Chief Executive and Senior Leadership Team”**

Brentwood Citizens Advice. Brett Sainty has recently relinquished his position as Vice-Chair and Chair of the Development Committee (although he remains a Trustee) and I would like to thank him for the leadership he has shown in those roles. We now have two Vice-Chairs, Jane Ainsworth and Tom Harrison and they are now also Chairing the Finance and Development Committees respectively.

The trustees are grateful to our local councils and other partners for their financial contributions and support which enable us to maintain and develop our services.

Finally, I would like to end by thanking our volunteers, staff, including the Chief Executive and Senior Leadership Team, and the volunteer solicitors who support our law clinic.

**Stuart Freel**  
**Chair**

# Chief Officer's Report

**It continues to be a pleasure to lead our brilliant team of staff and volunteers. Each and every team member makes such a unique and valuable contribution, thank you. This last year has been tough for so many of our local residents primarily due to the combined effects of the Cost of Living crisis, a huge increase in energy costs and the war in Ukraine.**

**O**ur 46 members of staff and 93 volunteers, who between them helped 19,789 unique clients in 2022/23, continue to make such a difference. This represented an increase in client numbers of over 20%, on the previous year, reflecting the increased demand for information, advice and guidance in our local communities.

We continue to seek out opportunities to improve and develop our services to meet local need. For example this year saw the launch of some new funded projects including several energy related projects helping local residents who are suffering from unprecedented rises in household energy costs and our exciting partnership with Macmillan, helping local residents who have a cancer diagnosis.



In June 2022 we started working in partnership with Thurrock Council's Library service, by opening our first self-service Library, in Corringham Library. The small group of volunteers and some of our supervisors have adapted to this new challenge brilliantly and now deliver our Citizens Advice services side by side with the self-service Library, in Corringham Wednesdays weekly.

Our work over the last year and in the future would not be possible without the ongoing support from all our funders. Massive thank you to all our funders including Basildon Borough Council, Brentwood Borough Council, Brentwood Community Fund, Castle Point Borough Council, DWP, Essex County Council, Money & Pensions Service, National



**OUR CORRINGHAM SELF SERVICE LIBRARY TEAM: (FROM LEFT TO RIGHT) ALASDAIR MILNE, RICHARD MARLTON, DANNY MARSHALL & SHARON ADCOCK**

Grid, Rochford District Council, Thurrock Council and, through our countywide partnership with Citizens Advice Essex, the support of Affordable Warmth Solutions, British Gas Energy Trust, Energy Saving Trust and Macmillan Cancer Support.

Working with such a dedicated and highly skilled team of staff and volunteers is a privilege, providing a much needed and highly valued Citizens Advice service for our local communities.

**Kathy Kentish**  
**Chief Officer**

## HOW WE HELP



We deal with quick and simple queries



As well as everything in between



We manage complex cases



**ADVICE AND SUPPORT**



**RESEARCH AND CAMPAIGNS**



**SOLVE PROBLEMS**

8 in 10 people have their problem solved



**CHANGE LIVES**

4 in 5 clients said advice improved their lives



**MAKE SOCIETY FAIRER**

We value diversity, champion equality, and challenge discrimination and harassment



# HOW WE HELP

## **PEOPLE COME TO US WITH ALL SORTS OF ISSUES:**

We know people need different types of support at various times in their life. One of our greatest strengths as a service is flexibility to deal with most issues that people come to us with and to tailor our advice to each person's needs.

People come to us with quick questions: they might want to double-check a letter or ensure they've chosen the best course of action. After ensuring that there aren't any further underlying issues, we're likely to support these clients through signposting or self-help, enabling them to deal with their queries quickly and effectively. In so doing, we use the Citizens Advice service's award-winning website that our clients may continue to refer to at home.

Our professional web-based resource, "advisernet", will be consulted for more complex issues, equipping advisers and caseworkers with the most authoritative and up-to-date information about legal rights and responsibilities.

Some clients come to us when problems have initially arisen – for others; their situation may rest on a knife edge. We help people that have reached a real crisis point and need urgent help. They may have bailiffs due that day, their energy

is about to be disconnected, or their home repossessed. It may have taken a lot of personal courage to take action. These clients will likely need more specialist advice and support.

Whatever level of help we offer, putting our client's needs at the heart of our decision-making means we can improve how people can get help to move forward.

## **We're confidential and non-judgemental:**

Our role is to help people find a way forward, so we'll be straight-talking and practical about how to resolve problems.

## **Our advice services can be accessed in different ways:**

Accessing timely free advice that meets user needs is essential, so we offer advice in person, over the phone, and via email and web chat.

We understand the complexity of issues that affect people's lives.

## **We understand that experiencing a problem affects self-confidence:**

So we'll provide as much support as needed, empowering clients to regain control of their circumstances with the certainty they're taking the right approach.

# Volunteering

**Volunteers are vital to the way we deliver our service, allowing us to reach many more people than if we were purely staff-run.**

They take on a range of roles from providing advice, supporting the running of the organisation, campaigning in the community and acting as trustees; they are our greatest assets.

We currently have over 90 active volunteers who last year gave over 28,000 hours as assessors, advisers, administrators, receptionists, information assistants and trustees.

Given the fact that many of these roles are fulfilled with high levels of skill experience, it is easy to imagine the cost of undertaking the same work with paid staff. Our measure of public value (see right) does not account for this, just the wider societal value.

In fact, one of the areas where we're only able to partially demonstrate our savings to public services is volunteering. Volunteering benefits our volunteers – they improve their skills, resilience, health and wellbeing, while strengthening community engagement.

Our volunteers give their time and skills every day to help make society fairer and provide the advice people need whoever they are, whatever the problem. We actively recruit, train, manage and develop our own volunteer community: one of our greatest assets.

Each volunteer receives training and ongoing support specific to their role. The investment of time and resources ensures that each volunteer is fully prepared for their role. Playing an active contribution to the day-to-day running of our organisation helps develop volunteers' practical skills, such as problem solving, communication and teamwork.

This improves employability, presents career development opportunities, and can help those currently unemployed to move into work. Just as important, it provides us with a vibrant and diverse team that is reflective of the communities we serve.

# VOLUNTEERING

## 54%

54% of retired volunteers reported feeling less at risk of isolation\*

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## 90%

Before volunteering, 69% of volunteers felt little or no engagement with their community. Since volunteering, 90% felt more part of their community\*

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## 34%

34% of our network volunteers left us for education, employment or training\*

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## £444,774

Wider public value of our volunteering was over £444,774

\*based on national research

# VOLUNTEER CASE STUDY

## Where has the time gone?

It seems a long time ago that I started as a volunteer advisor at the Basildon office. I came from a business background where I managed a large team of insurance company surveyors and could tell you all you needed to know about subsidence, party walls, building construction etc, but I knew nothing about benefits, debt, marriage/partnership breakdown, domestic abuse, child arrangements and so many more issues.

The training was excellent, I gathered knowledge as I went along, and I was soon let loose with real live clients. I managed quite well, getting positive feedback from the supervisory staff. Being patient and able to listen to what clients have to say is an extremely important part of the role, and analysing the issue(s) and then finding a successful way forward provides a level of job satisfaction that is definitely worth getting out of bed for!

Getting through the pandemic was very tough for all Citizens Advice staff and volunteers, but the 'show was kept on the road' with impressive technical backup allowing this to happen. At first I vowed that I never wanted to get involved with the telephone based Adviceline system as I would no longer be seeing clients face-to-face, however I found myself working on nothing but Adviceline for two long years tucked away in my office at home. There were advantages

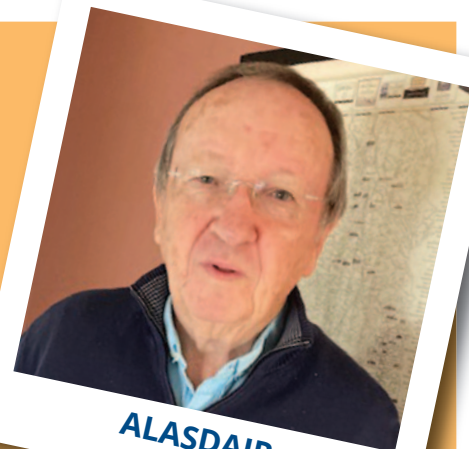
in working from a home environment, in particular scrambled egg, toast and a mug of tea on my desk – I can never recall that happening in the Basildon office!

Client face-to-face returned for me with the invitation to go and be part of a team at the new Corringham Library outreach centre which has turned out to be a very pleasant location to work in. Once again this has allowed me to see 'real clients' with their many diverse problems, but also to work in a close-knit team with all of the usual banter that comes from colleagues you get to know well.

It is a truism to say that you never know who is going to walk in the door on any one day or what they wish to talk about, but whatever the issue there is normally a way forward in some way or another, and to see a client walk out of the door far more positively than when they came is always going to be rewarding.

Volunteering has certainly worked for me and I would have no hesitation in recommending it to others to give it a try.

**Find out how to volunteer with us**  
[www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)



**ALASDAIR**

# Our Value to Individuals

There's often a financial value to people having their problems solved. Using an established outcomes framework we are able to assure our funders of the financial outcomes achieved for our clients.

## THE VALUE OF BENEFITS ADVICE

In additional income for clients both on an ongoing annualised basis and through backdated awards through the identification of entitlements and challenging of incorrect decisions.

Total over  
**£12.08**  
million

## THE VALUE OF DEBT ADVICE

Where we have acted to help clients successfully pursue the debt write offs. The total value of debts owed by clients, where advice was given is much higher – estimated at £13.6 million.

Total over  
**£3.71**  
million

## THE VALUE OF CONSUMER ADVICE

Supporting clients to resolve consumer problems with goods and services.

Total over  
**£288,000**

# Our Value to Society

We use an established model to calculate the financial value of our advice and the positive outcomes it contributes to individuals and society.

In 2022/23, for every £1 invested in Citizens Advice South Essex generated:

**£3.99** in savings to government and public services (fiscal benefits)

By helping stop problems occurring or escalating, we reduce pressure on public services like health, housing or out-of-work benefits.

Total over  
**£4.19**  
million

**£27.44** in wider economic and social benefits (public value).

Solving problems improves lives and this leads to better well-being, participation and productivity for the people we help.

Total over  
**£28.81**  
million

**£15.32** in value to people we help (financial outcomes).

As part of our advice we increase people's income, through debts written-off, taking up benefits and solving consumer problems.

Total over  
**£16.08**  
million

## HOW WE MEASURE THE FINANCIAL VALUE OF OUR SERVICE

Central to how we conceive our value is a simple premise: we create value through the positive impact we have on individuals' lives, which in turn benefits local communities and society. These individuals might be our clients, or members of the public who benefit from our work in terms of the knock-on effect of our work with Individuals. We use a cost-benefit tool developed with and approved by HM Treasury economists to ensure that the methodology is robust and it takes account of the most up-to-date research and data.

It is impossible to put a value on everything we do and therefore we have identified some of the main areas where we can show we have a positive direct impact and where there is evidence appropriate to the model.

# VOLUNTEER THANK YOU

Each and every volunteer who supports the valuable service we provide is worth their weight in gold. They make a massive difference for our local communities we want to say a **BIG THANKYOU.**



## TOP: SOME OF OUR HARDWORKING VOLUNTEERS IN BRENTWOOD

From left to right: Susan Kortlandt, Sarah Gardiner, Janice Tucker, Dot Avis, Luke Cully and Balvinder Bhogal

## BELOW: A SUNNY PICTURE OF OUR ROCHEFORD TEAM OUTSIDE OUR OFFICE

From the left: Kay Bailey – Supervisor, Val Watson – Assessor, Andrea Davies – Debt Adviser, Sue Mackenzie – Assessor and Janet Kendrick - Assessor



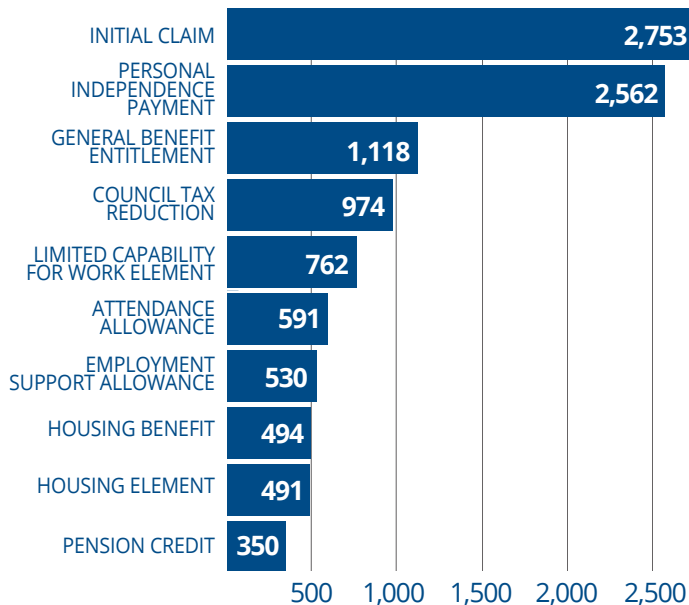
# Key Statistics

We deal with far more “issues” than clients, meaning that in order to effectively respond to a client’s situation we might need to address multiple facets of their lives and their problems.

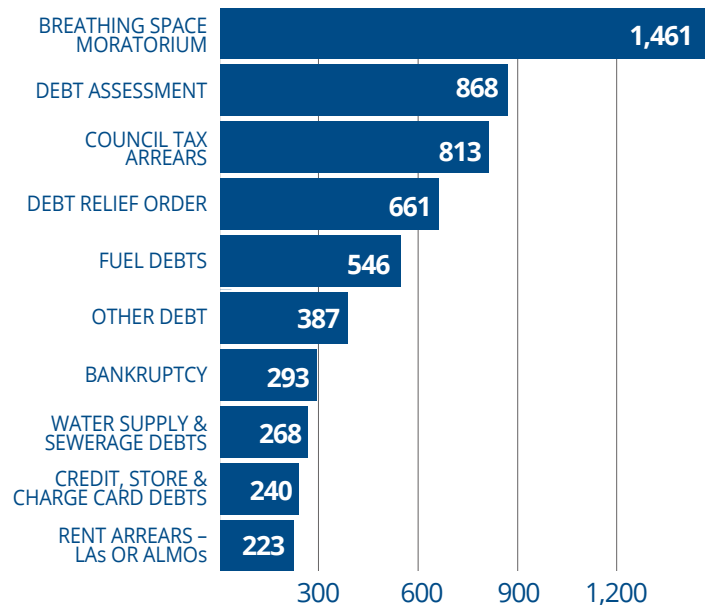
The ratio is much higher than that of the Citizens Advice service as a whole, reflecting the orientation of our services towards intensive, casework driven services, which is a characteristic of the organisation and undertaken by both volunteers or paid staff.

Extensive, high quality and holistic advice actually saves time in the long run. It helps our clients resolve their problems more quickly, prevents them from getting worse and ultimately ensures that the worse consequences of a life event are minimised. It also speaks to the fact that we rarely need to make referrals to other organisations.

## TOP 10 BENEFITS ISSUES

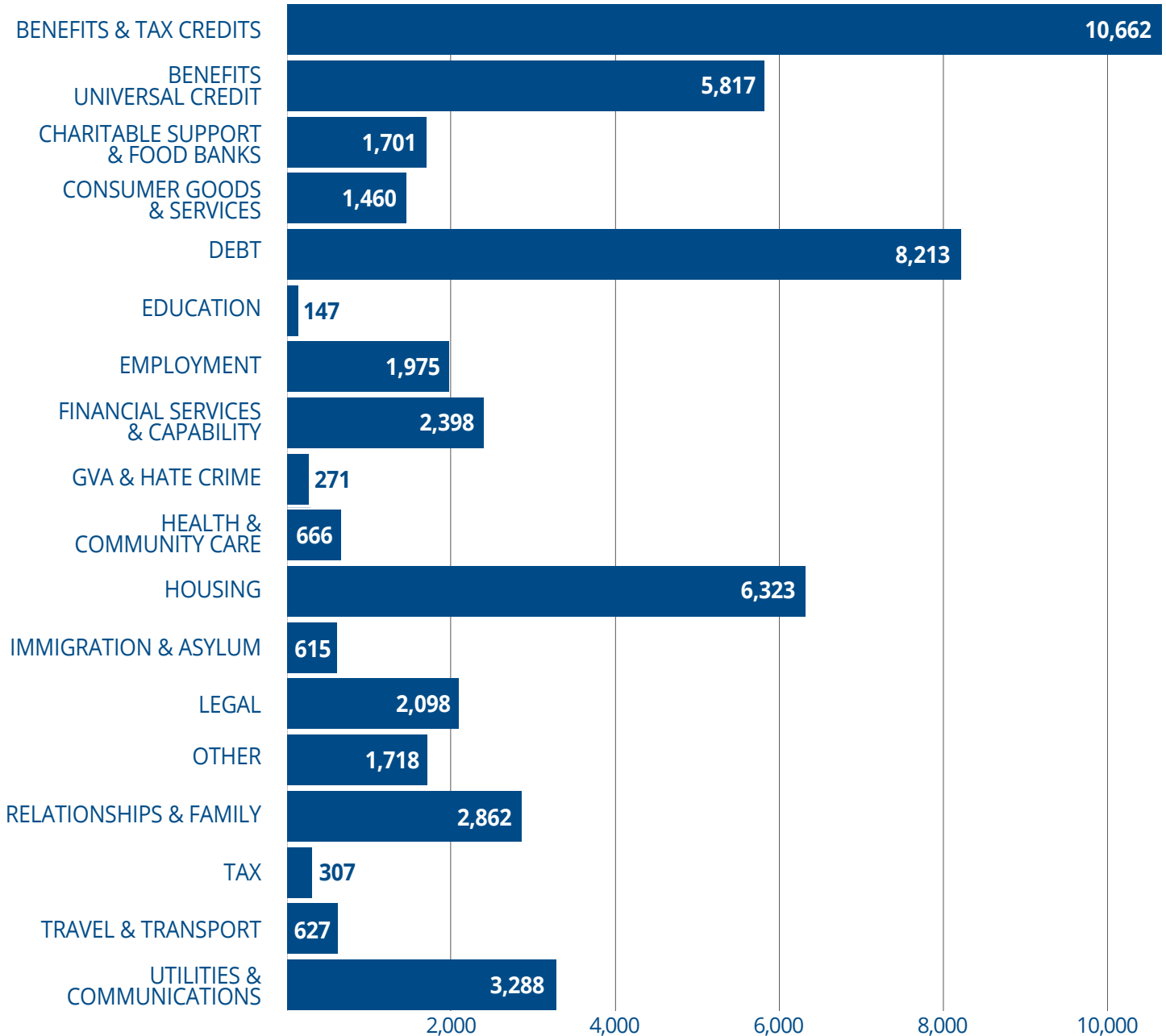


## TOP 10 DEBT ISSUES





# ISSUES



# South Essex Law Clinic

**Our South Essex Law Clinic provides legal advice to an average of 80 new local residents a quarter, over 300 in 2022/23.**

**The Law Clinic provides a one-off free appointment with a solicitor for up to 30 minutes for people who live or work in the local authority areas of Basildon, Brentwood, Castle Point, Rochford and Thurrock.**

The Law Clinic works with six local law firms and currently offers appointments covering Family, Housing and Civil Litigation. With up to 16 appointments available each week. We would like to thank all the solicitors involved with the Law Clinic, who give up their valuable time and expertise to offer this great community service.

The service can be accessed via Citizens Advice South Essex services or appointments can be requested direct on the Law Clinic's website, by email or over the phone:

**01268 219730**

**help@southessexlawclinic.com**

**www.southessexlawclinic.com**

The Law Clinic is in the process of trying to recruit additional solicitors so we can offer a broader range of legal advice and improvements to the information available on our law clinic website.



# CASE STUDY

## ANNE

### The Value of High Quality Holistic Advice

Anne\* is in her early 60's, she is living alone in a council property. Anne is disabled and has multiple long term health issues, unfortunately this includes 2 recent heart attacks. She is in receipt of various benefits including Employment Support Allowance, Personal Independence Payment, Housing Benefit and Council Tax Support.

Anne approached Citizens Advice for help because she is the victim of anti-social behaviour by a neighbour, she sought our help to try to move into sheltered accommodation.

We helped Anne successfully apply for Sheltered Housing. However while exploring her situation and income we found that she was entitled to the Severe Disability Premium (SDP), due to her health, care needs and because she lived alone with no one caring for her.

To cut a very long story short, she had been entitled to this Premium from 2014, due to a DWP error this had never been claimed or paid.

We helped Anne apply for her SDP and applied for a backdate to 2014.

The outcome for Susan has been incredible she managed to move into a home where she feels safe and received over £18,000 as a



backdated payment for her severe disability premium. In addition her Employment Support Allowance has increased from £270.70 to £409.50 per fortnight.

\* Client names have been changed and certain details have been omitted or changed to preserve their anonymity.

# Research & Campaigns

Here at Citizens Advice South Essex, we are in a unique position to gather and analyse a huge amount of insight and data about the problems facing our clients in the local authority areas we covered in 2022-23, Basildon, Brentwood, Castle Point, Rochford & Thurrock. This means that we can see what issues are faced by our local residents.

## WE USE THIS INSIGHT AND DATA TO DO SEVERAL THINGS:

- To influence decision makers to change policies and practices
- To campaign to get decision makers to change policies and practices
- To work towards a better life for those in our local community

Everyone contributes towards our research and campaigns activity, often completing evidence forms where they find something that has affected our local residents unfairly or unjustly. Sue Murray and Marion Bayton lead our research and campaigns activity, often collating our local evidence ready for submission to national Citizens Advice.

By collecting evidence, we can use our clients' anonymised cases, backed up



with the quantitative data to analyse and inform. We can show the impact of an unjust or unfair local or national policy and do our best to campaign for change.

## LOCAL ISSUE

Sarah and Richard approached us for help with their housing situation. They had been tenants of their Local Authority for 16 years in a second floor, 1-bedroom flat.

They adopted once and were looking to adopt their child's sibling through an Adoption Agency. The Agency would only consider a second adoption if they had suitable bedroom arrangements. They applied to the Local Authority (LA) for a bigger, more suitable property.

The LA Housing Allocation Scheme did not give any priority to those looking to adopt as would have been the case if she was pregnant. The policy was considered discriminatory against parents who adopt children.

We provided advice and support to Sarah and Richard. We were able to refer to a local solicitor who, due to the complexity of the case and possible legal challenge, was willing to assist.

As a result, the LA reviewed and changed their policy in relation to bedroom allocation and banding when couples are looking to adopt. Sarah and Richard were put in the highest banding available with the adequate bedroom entitlement being given. They are now in a suitable property and the second adoption took place.

Sarah recounted that our involvement had made a massive difference to them and relieved the stress they were experiencing; but also to others looking to adopt. Without us they would not have accessed the legal advice they needed to resolve the problem.

**Marion Bayton**  
**Volunteer Research &  
Campaigns Adviser**



# CASE STUDY

## SUSAN

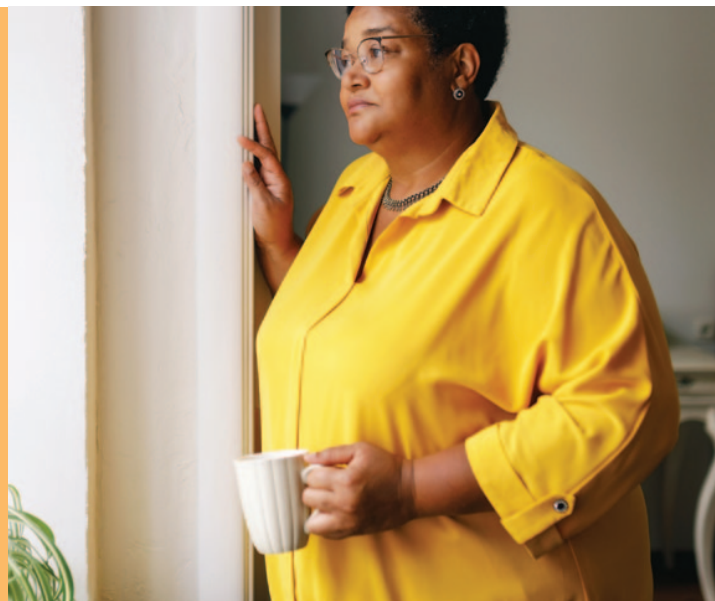
Susan\* is in her fifties, living with a non-dependent child in a housing association property, she suffers from multiple long term health conditions including mental health issues.

Susan approached us for help with her debts. She was struggling financially, her debts were gradually increasing and she was finding the whole financial situation stressful, which exasperates her mental health issues. She owed over £8k, all non-priority debts.

In addition she was confused about universal credit and wanted to understand if she would be better off transferring from Employment Support Allowance onto Universal Credit.

### Support provided over several appointments included:

- Emergency food and fuel vouchers
- Full debt advice, including checking income, maximising income, pros and cons of all debt options
- Help to reduce water and energy costs
- Working with the clients Mental Health practitioner to enter the client into a mental health breathing space
- Letters to her creditors
- Checking creditors including tracing a bank account



- Support to apply for a Debt Relief Order, as a long term debt solution
- Checking if client would be better off switching to Universal Credit (she shouldn't at this stage, she is financially better off on employment support allowance and she is better to wait for the managed transition to Universal Credit)
- We explained how her mobility vehicle is not included as an asset for her Debt Relief Order

Susan received the support she needed to manage and stabilise her financial situation, culminating in a successful Debt Relief Order application. The advice, support and actions taken all help improve her health and wellbeing, by dramatically reducing her worry and anxiety about her financial situation.

\* Client names have been changed and certain details have been omitted or changed to preserve their anonymity.

# Life is better with Citizens Advice

- Confidential
- Impartial
- Independent
- Free



# **Citizens Advice South Essex**

## **Life is better with Citizens Advice**

We provide free, confidential and independent advice to help people overcome their problems. We are a voice for our clients and consumers on the issues that matter to them.

We value diversity, champion equality, and challenge discrimination and harassment.

We're here for everyone.

