

# The difference we make to Somerset

1<sup>st</sup> April 2022 – 31<sup>st</sup> March 2023



# How to read this report

## core service

Our **core service** is our front-door, offering general advice on a wide range of topics, accessed via phone, email or in-person.

We provide:

- immediate assistance when needed
- follow-on help for complex problems
- 'warm transfer' to funded projects for specialist assistance

When describing our **core service** in this report, blue boxes are utilised and this logo is used

citizens  
advice

Somerset  
Core Service

# How to read this report whole service




Our service is complex.

We collect a large amount of information to measure how our various projects deliver advice.

This report concentrates on our core service, but also includes data about our **whole service**:

- where it is helpful for context
- if data cannot be broken down to core service delivery specifically

A large orange rectangular box containing text. An orange arrow points from the top-left corner of the box towards the 'whole service' logo in the top right corner of the slide.

When describing our **whole service** in this report, yellow boxes are utilised and this logo is used

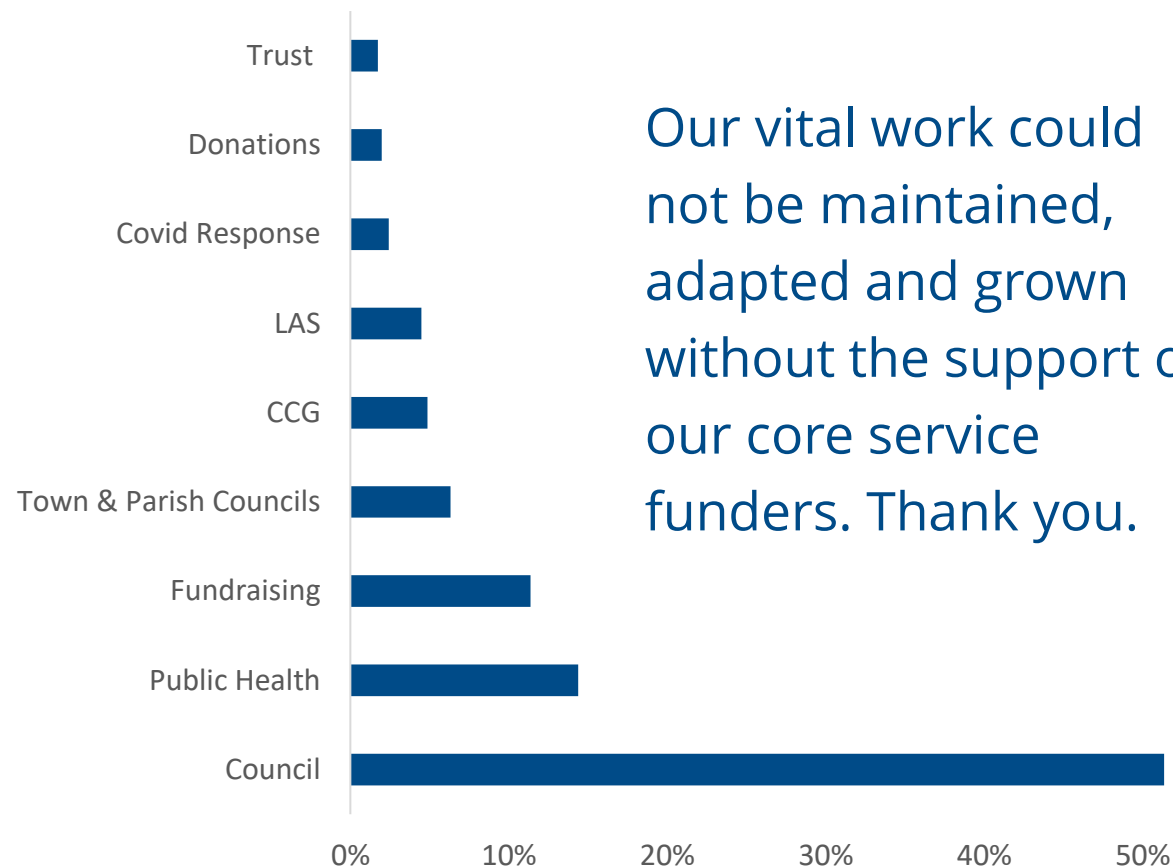
# What we do

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We provide a high quality, responsive advice service that meets client's needs:

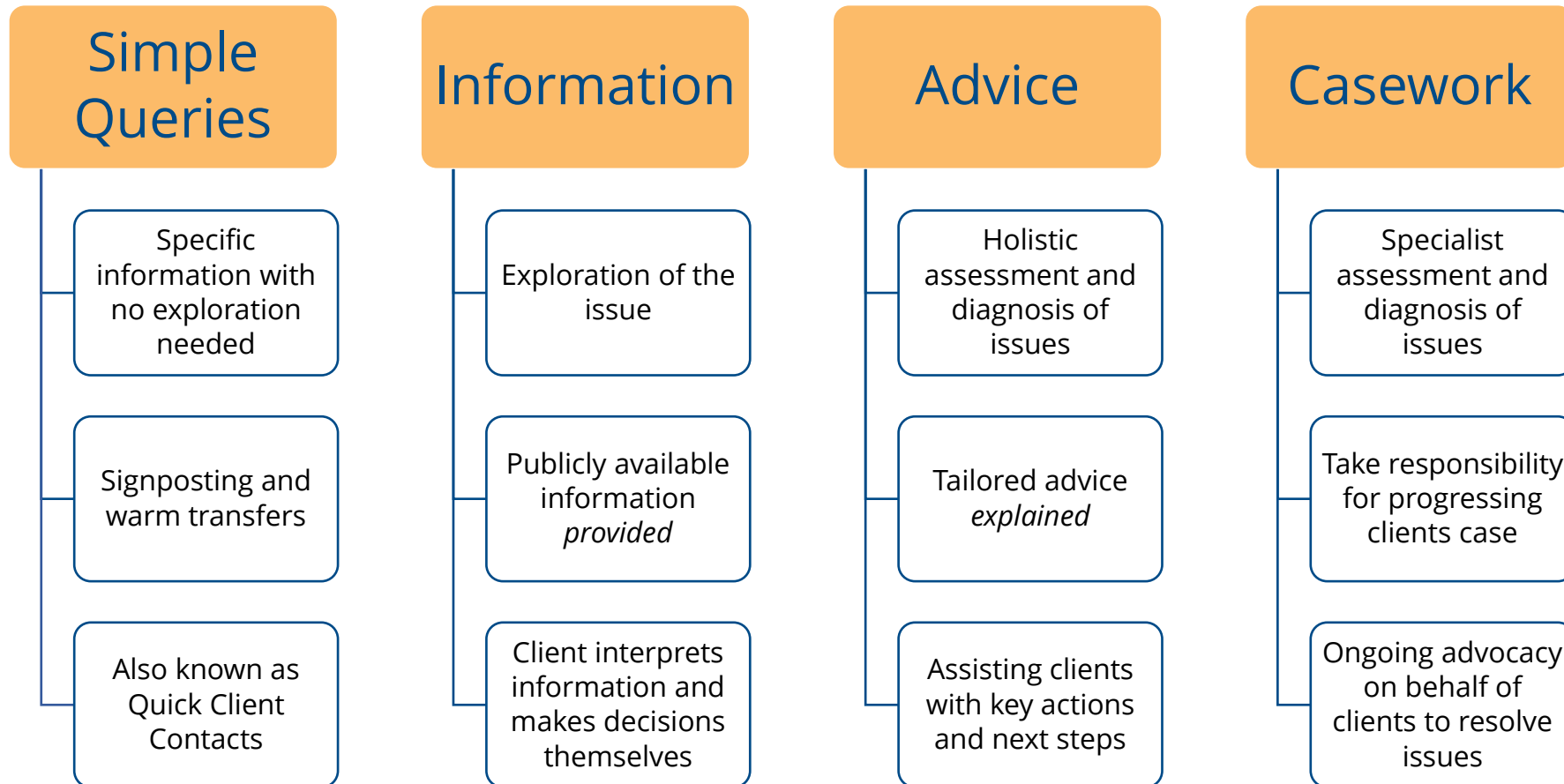
- empowering them to act early to avoid a problem escalating
- enabling them to address the issues that adversely affect their lives



Our vital work could not be maintained, adapted and grown without the support of our core service funders. Thank you.

# How we help

Our service assists people in different ways, depending on their needs and issues. Many people receive multiple 'tiers' of help.



# Who have we helped?

Between 1st April 2022 – 31st March 2023  
our core service was open to anyone in need of  
advice.

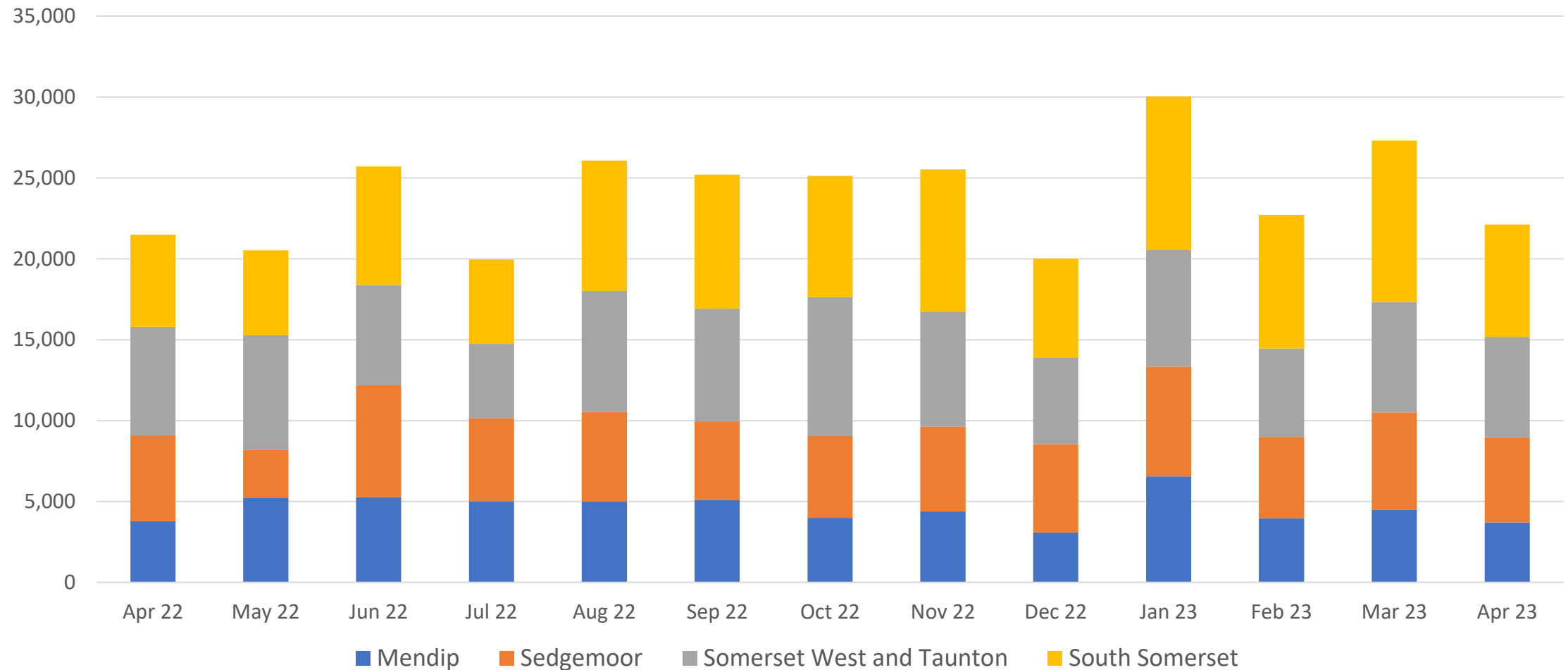
For people with complex problems or specific  
needs, specialist help was available through our  
variety of funded projects:



**25,194**  
Clients helped



Number of national CA website users per LA



# Recorded financial outcomes

Where we know the financial outcome of advice, we record this under the four categories below. **It is important to note we often do not know the financial outcome.**

## Income maximisation

Additional cash in client's pocket  
E.g. benefits awards, appeals won

£2,253,811

£7,966,639

## Debt written off

Money no longer owed  
E.g. Debt Relief Order

£212,034

£998,601

Core service

Whole service

## Repayments scheduled

Debt still owed, but manageable  
repayments agreed and set up

£13,313

£65,115

## Reimbursements

Financial benefit but not gain,  
E.g. social care costs reduced

£30,874

£53,951



# Cost-benefit analysis

As we cannot know the financial outcome of our advice for all clients, we also estimate the value of our advice using a [Treasury approved model](#) developed by New Economy (now merged with Greater Manchester Combined Authority).

For every **£1** invested in Citizens Advice Somerset in the financial year 2022/23, we generated:

## Fiscal value

**£3.46**

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.

## Public value

**£26.46**

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.

## People we help

**£12.76**

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

# Whole service key stats

This data represents our key stats for the **whole service** (core and projects) delivered by CA Somerset between 1<sup>st</sup> April 2022 – 31<sup>st</sup> March 2023

## Clients



25,194

We count the number of **unique clients** we have helped in the reporting period – clients are only counted once regardless of number of interactions.

## Issues



86,733

Clients often present with complex, **interrelated problems**. Multiple issues are recorded to describe the full breadth of any one client's advice needs.

## Activities



125,096

Counting activities provides insight into **workload** – we count each interaction between advisers, clients and third parties and which channel is used.

## Cases

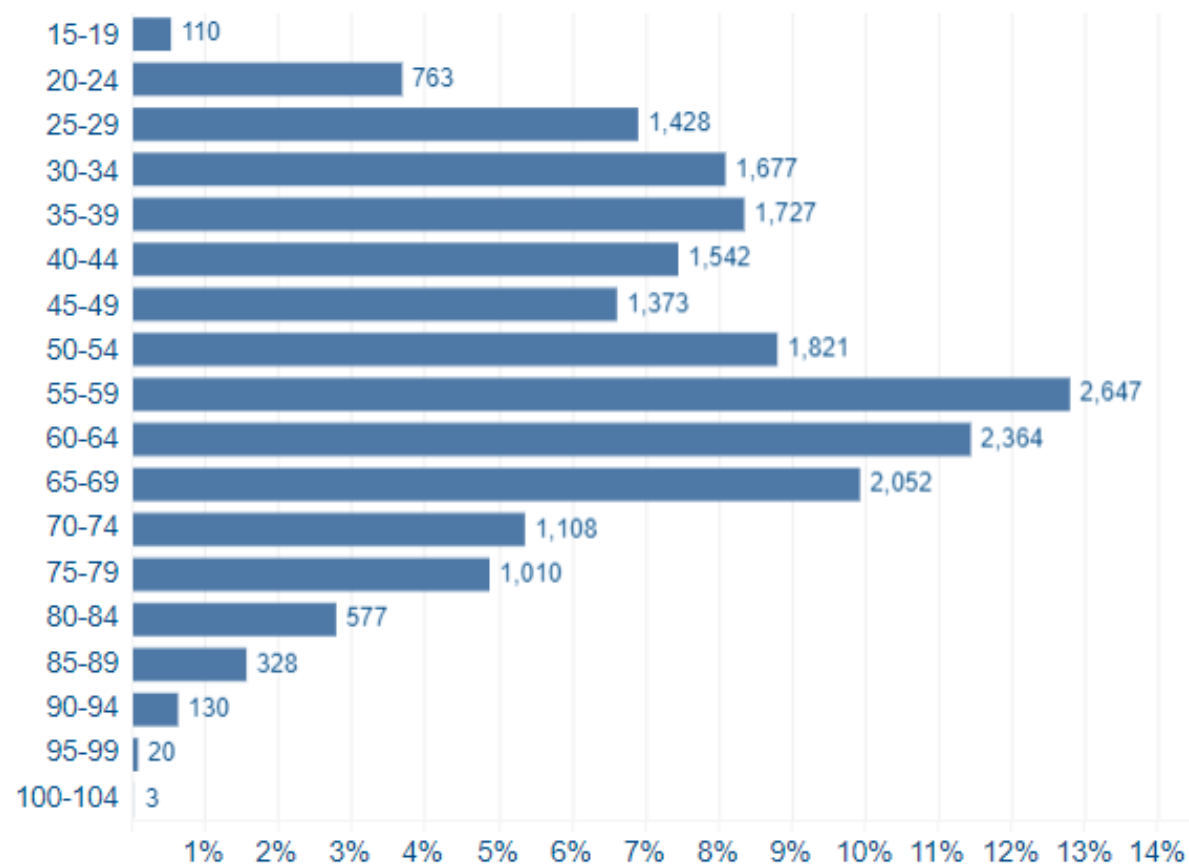


24,899

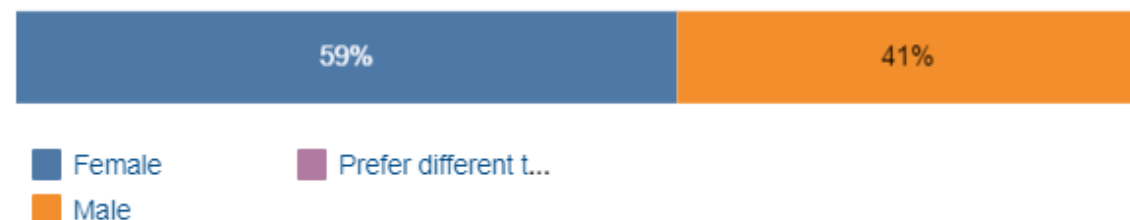
We count the number of **new cases** opened. A case is a kind of virtual 'file', made up of the activities, issues and channels used. Clients can have more than one case.

# Client demography

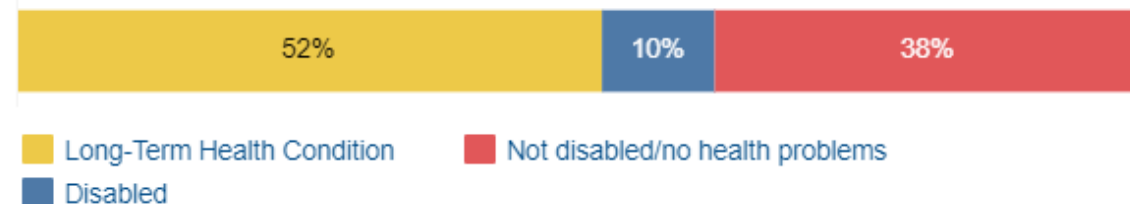
## Age



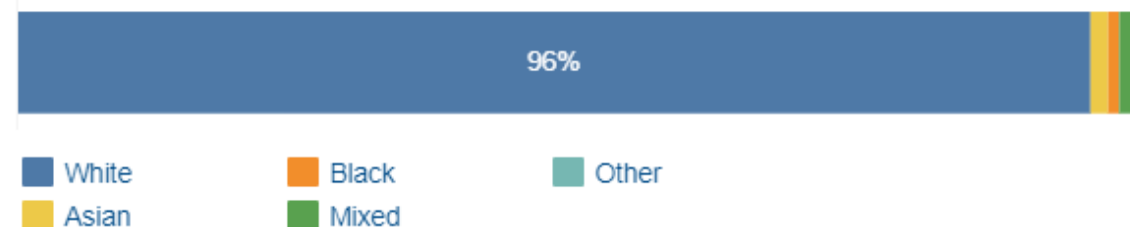
## Gender



## Disability / Long-term health



## Ethnicity



# Core service

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Our core service is open to anyone in need of advice.

For some people, we provide immediate advice at first contact to prevent problems escalating.

For others, accessing our core service opens the door to follow-on advice or casework until their problem is resolved.

**Advice  
at first  
contact**



**54%**

**Advice  
requiring  
follow-up**



**46%**

# Follow-on advice

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The impact of the advice and support our advisers deliver can be significant:

January 2023

Volunteer adviser Chris successfully assisted a client with a PIP appeal, the client has been awarded **£12,947.49** of PIP arrears, is receiving **£156.90** of ongoing weekly payments and is now also entitled to a weekly severe disability premium of **£69.40**, which will need to be backdated for almost 2 years of missed payments.



# Follow-on advice

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March 2023

A very vulnerable client was supported with his PIP appeal and **empowered to attend and advocate for himself**, despite being very anxious about having to share very personal information with us and the tribunal panel. The client was awarded PIP at the enhanced rate of daily living until 2026, and received nearly **£8,000** of arrears.

# Core Service Key Stats

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This data represents our key stats for the **core service** (excluding projects) delivered by CA Somerset between 1<sup>st</sup> April 2022 – 31<sup>st</sup> March 2023

## Clients



13,961

We count the number of **unique clients** we have helped in the reporting period – clients are only counted once regardless of the number of interactions.

## Issues



49,705

Clients often present with complex, **interrelated problems**. Multiple issues are therefore recorded to describe the full breadth of any one client's advice needs.

## Activities



54,805

Counting activities provides insight into **workload** – we count each interaction between advisers, clients and third parties and which channel is used.

## Cases



16,648

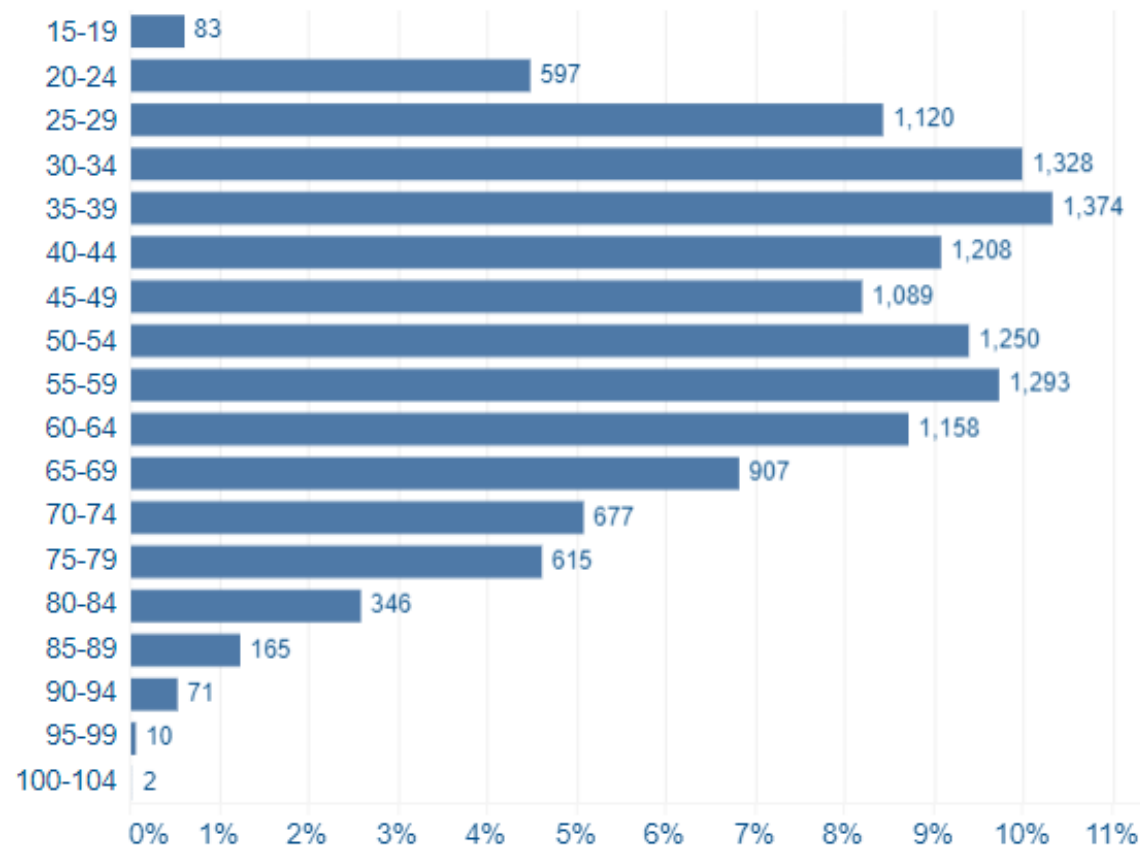
We count the number of **new cases** opened. A case is a kind of virtual 'file', made up of all the activities, issues and channels used. Clients can have more than one case.

# Demography

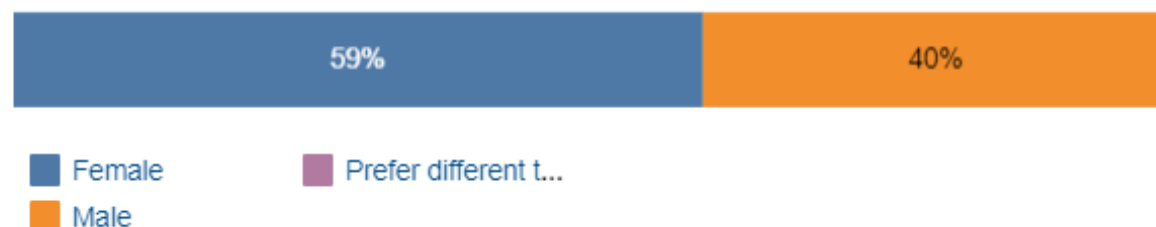
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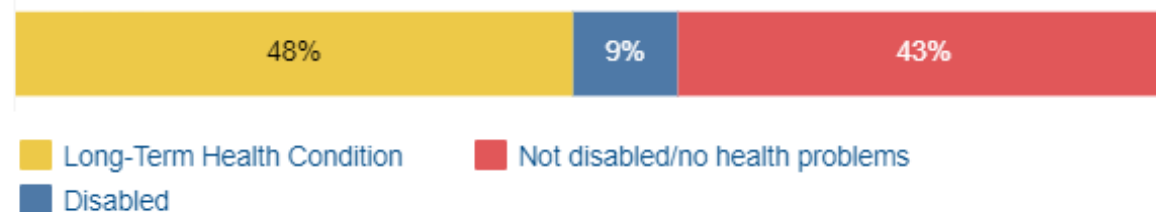
## Age



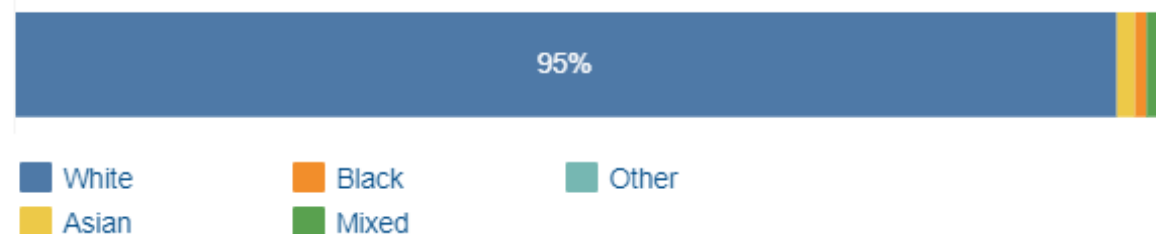
## Gender



## Disability / Long-term health

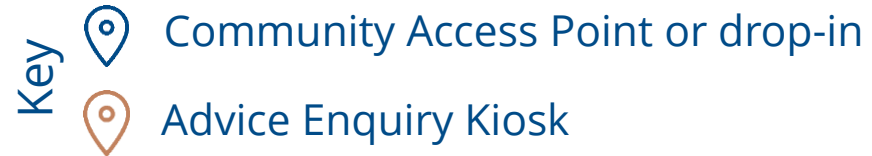


## Ethnicity





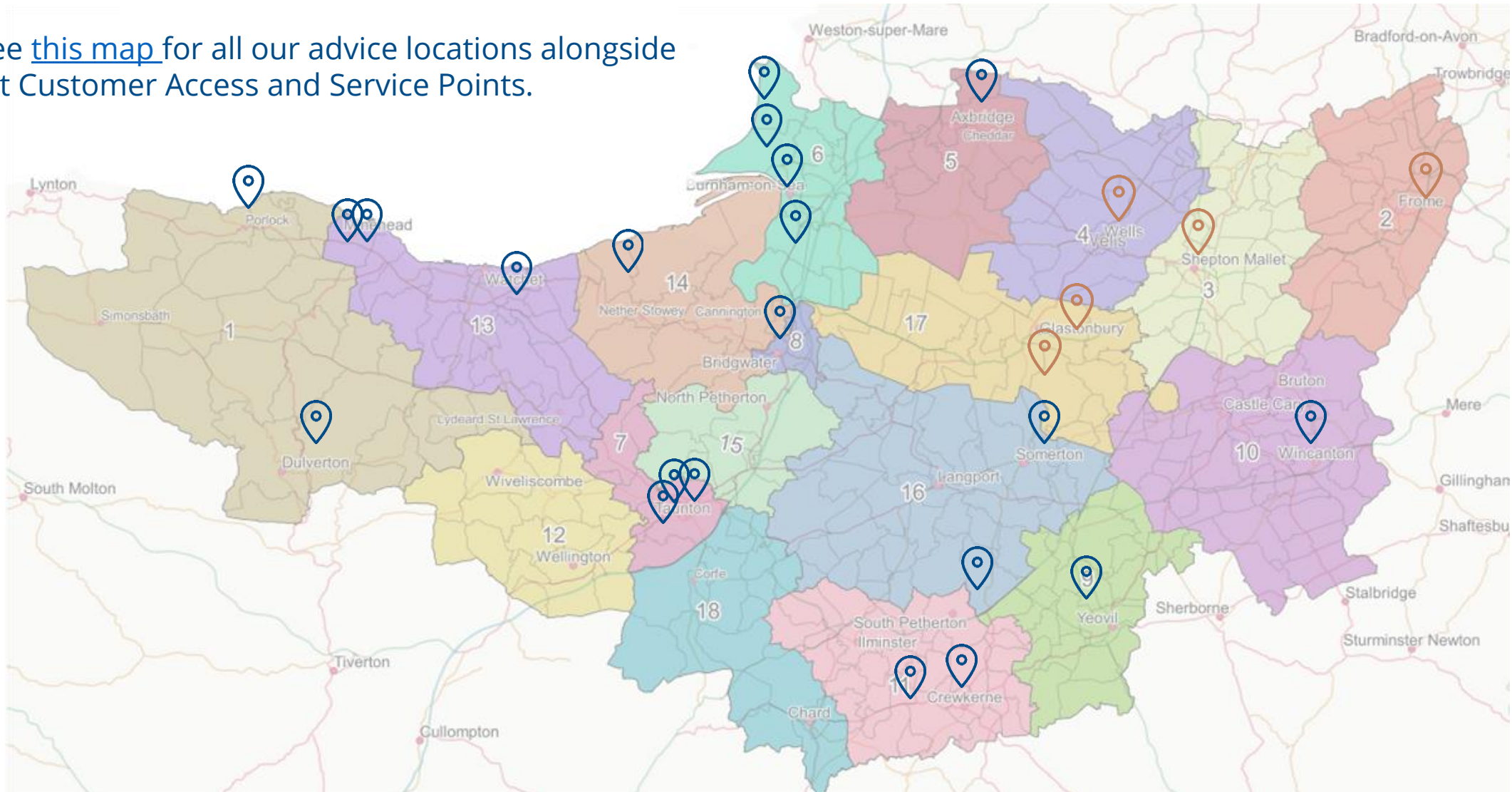
# Where we help



**citizens  
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**Somerset**  
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Please see [this map](#) for all our advice locations alongside Somerset Customer Access and Service Points.

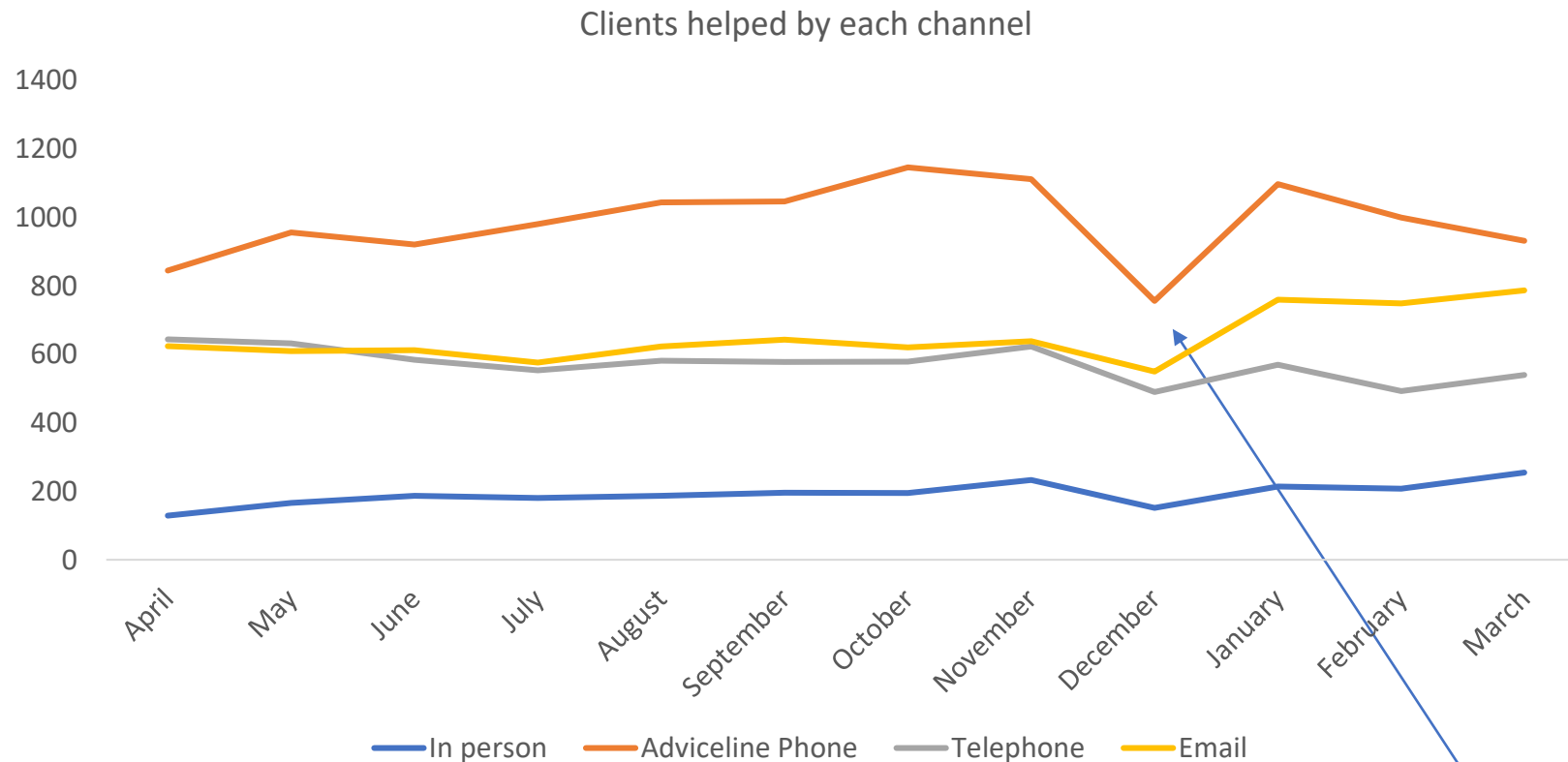


# How do advisers interact with clients?

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We record the channel for each interaction between advisers and clients. If a client and adviser interact across more than one channel (e.g. a phone call and an email), a count of one will be added to each channel.



The Citizens Advice network experiences a seasonal drop in demand every December

# What do clients think about us?

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We conduct a regular Client Experience survey to help us understand how well we're meeting the needs and expectations of clients and to identify where improvements could be made.

86%



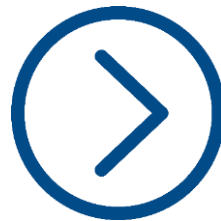
clients would  
**recommend**  
our service

78%



Clients found it  
**easy to access**  
our service

83%



Clients were  
**helped forward**  
by our service

72%



Clients say their  
**problem is now**  
**resolved**

66%



Clients felt less  
**stressed, anxious**  
**or depressed**

# Issues

Clients have complex, interrelated problems due to their circumstances and support needs.

We refer to these as issues and record three levels of information:

**Category:** This is the main category of the problem e.g. benefits, debt or housing.

**Subject:** This is more detailed information like the type of benefit e.g. Attendance Allowance, or debt e.g. rent arrears

**Detail:** This is the type of advice we give e.g. eligibility for benefits

## 22/23 Core Service Issues (category)

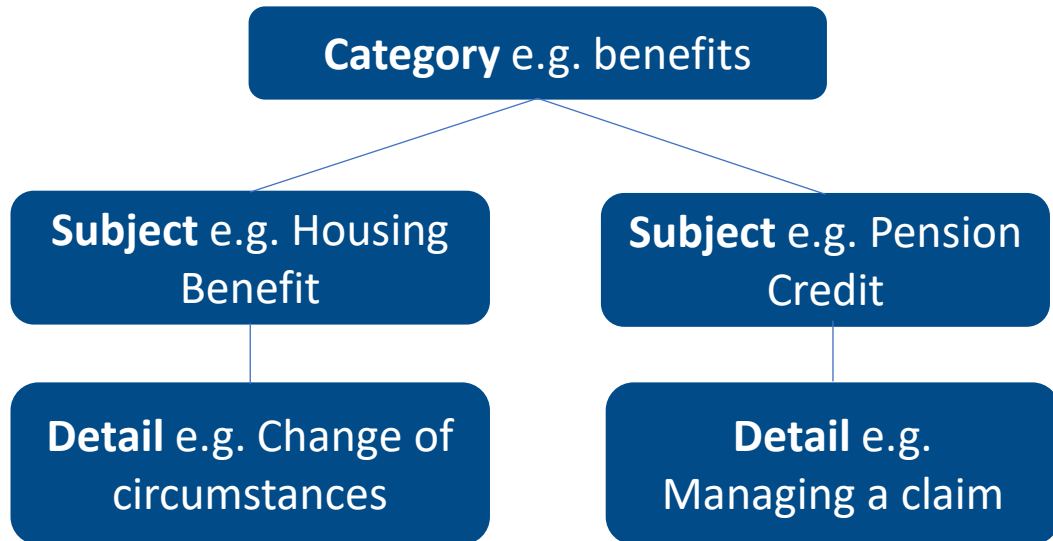
	Issues	Clients
Benefits & tax credits	14,097	5,136
Housing	6,548	2,599
Benefits Universal Credit	4,495	2,006
Debt	4,345	1,787
Relationships & family	3,776	1,869
Charitable Support & Food Ban..	3,477	1,779
Employment	3,353	1,313
Legal	2,074	1,278
Utilities & communications	1,496	812
Consumer goods & services	1,362	803
Health & community care	978	553
Financial services & capability	906	638
Immigration & asylum	798	351
Travel & transport	670	477
GVA & Hate Crime	484	287
Tax	435	315
Other	239	230
Education	172	117
<b>Grand Total</b>	<b>49,705</b>	

# How we count issues

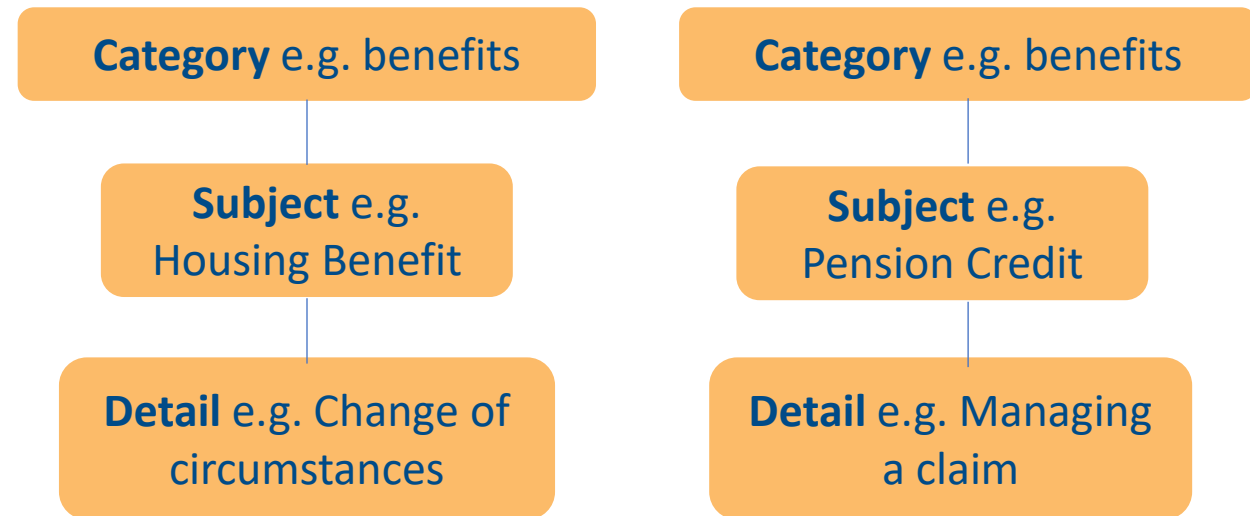
We count issues in two ways, as illustrated below:

- Total **number of clients** with a new issue in the reporting period
- Total **number of issues** in the reporting period (clients often have more than one issue)

**number of clients = 1**



**number of issues = 2**



# Trends – top issues

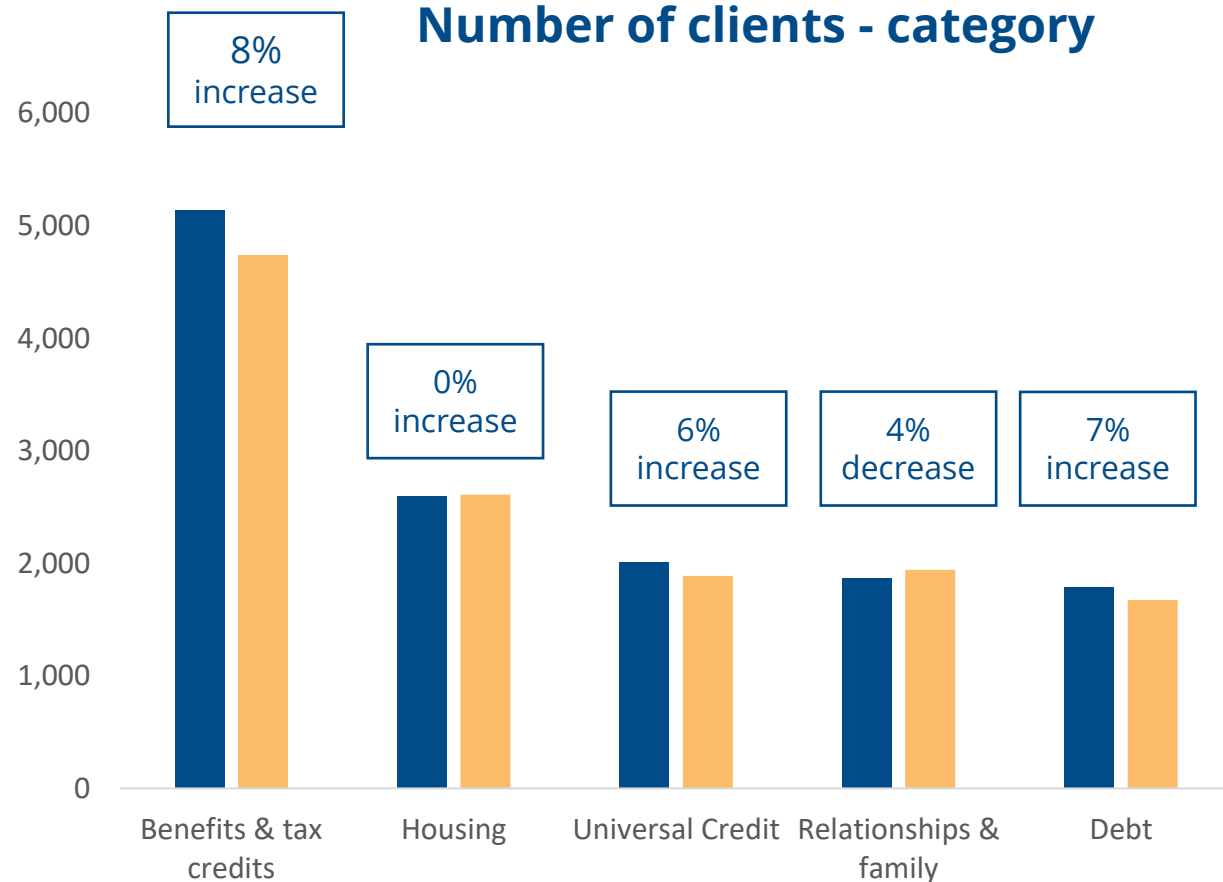
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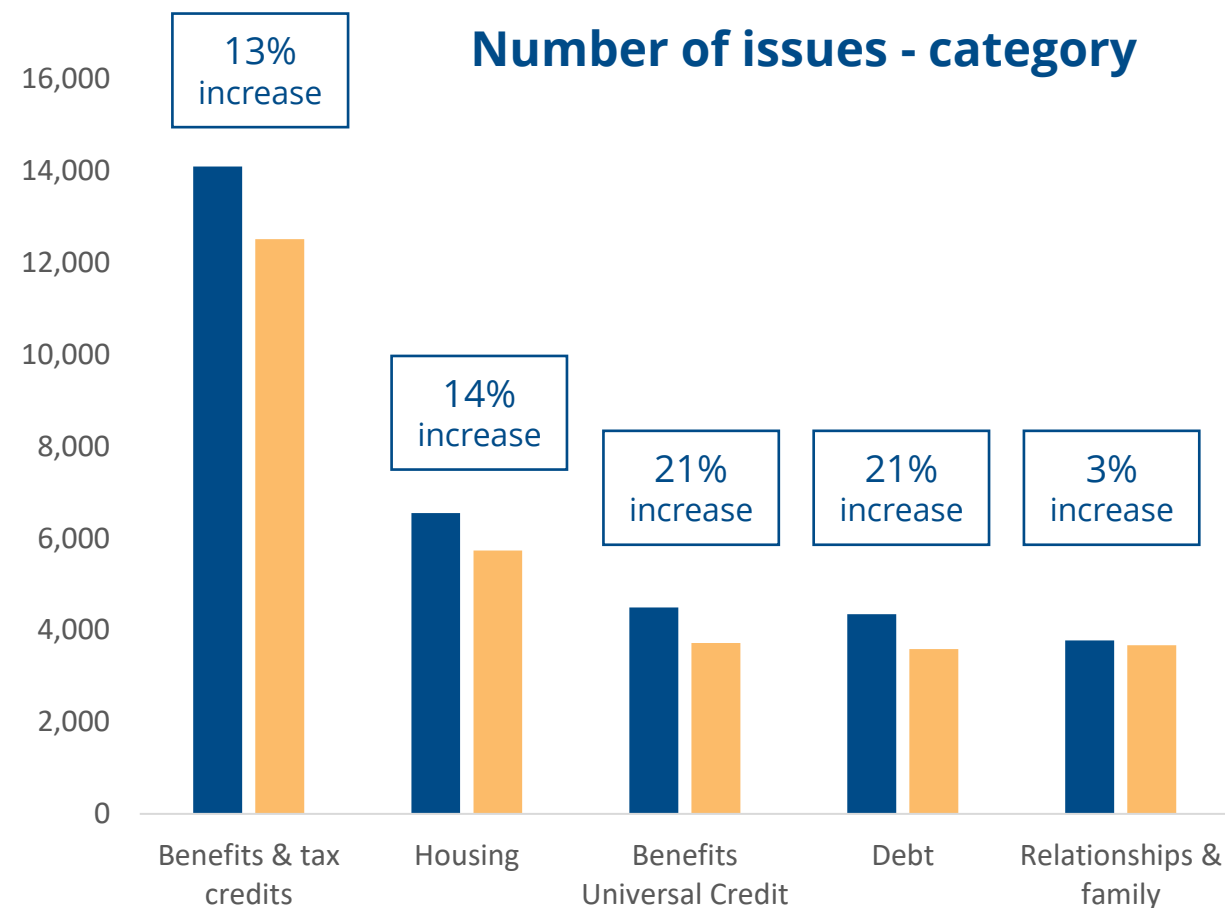
Comparing the number of clients and issues across the two reporting periods shows how advice needs change over time.

■ 22/23 ■ 21/22

## Number of clients - category

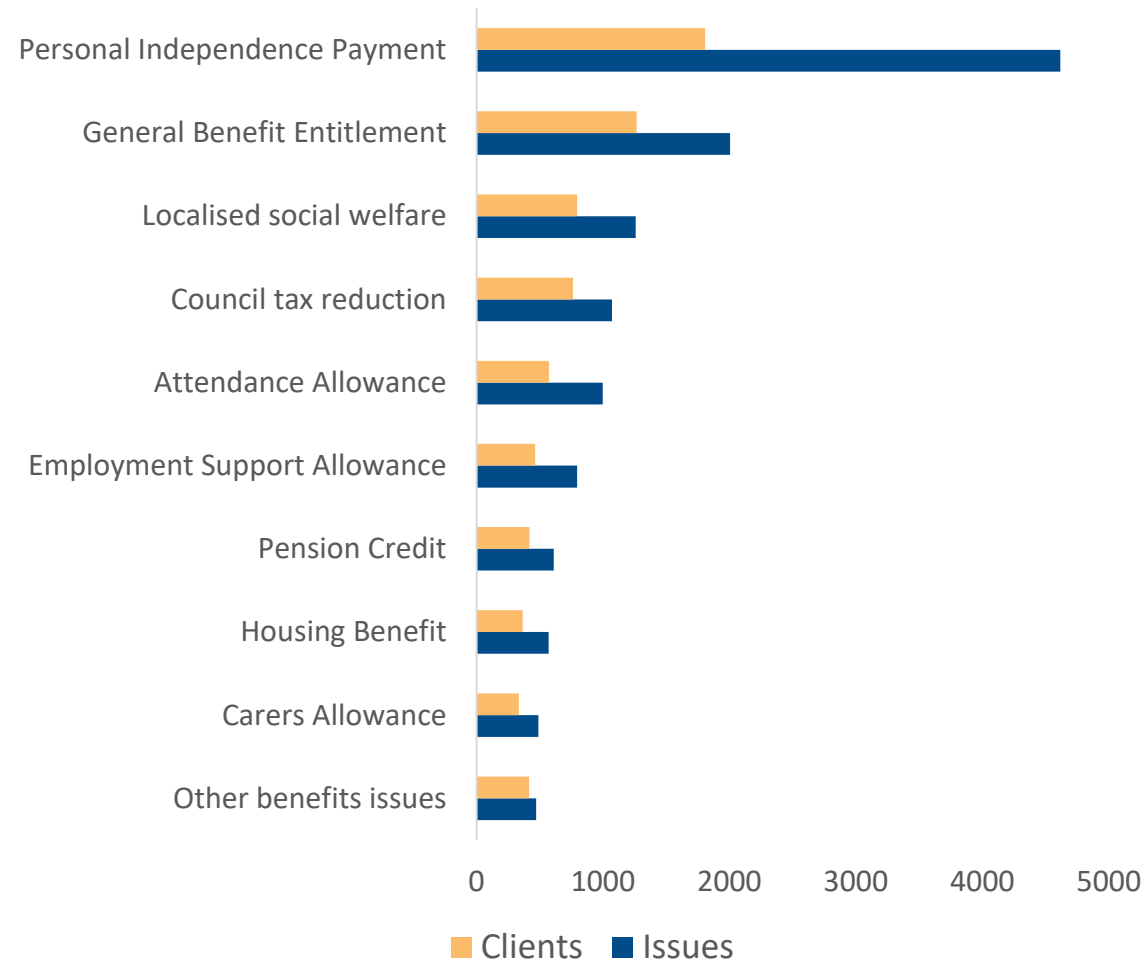


## Number of issues - category

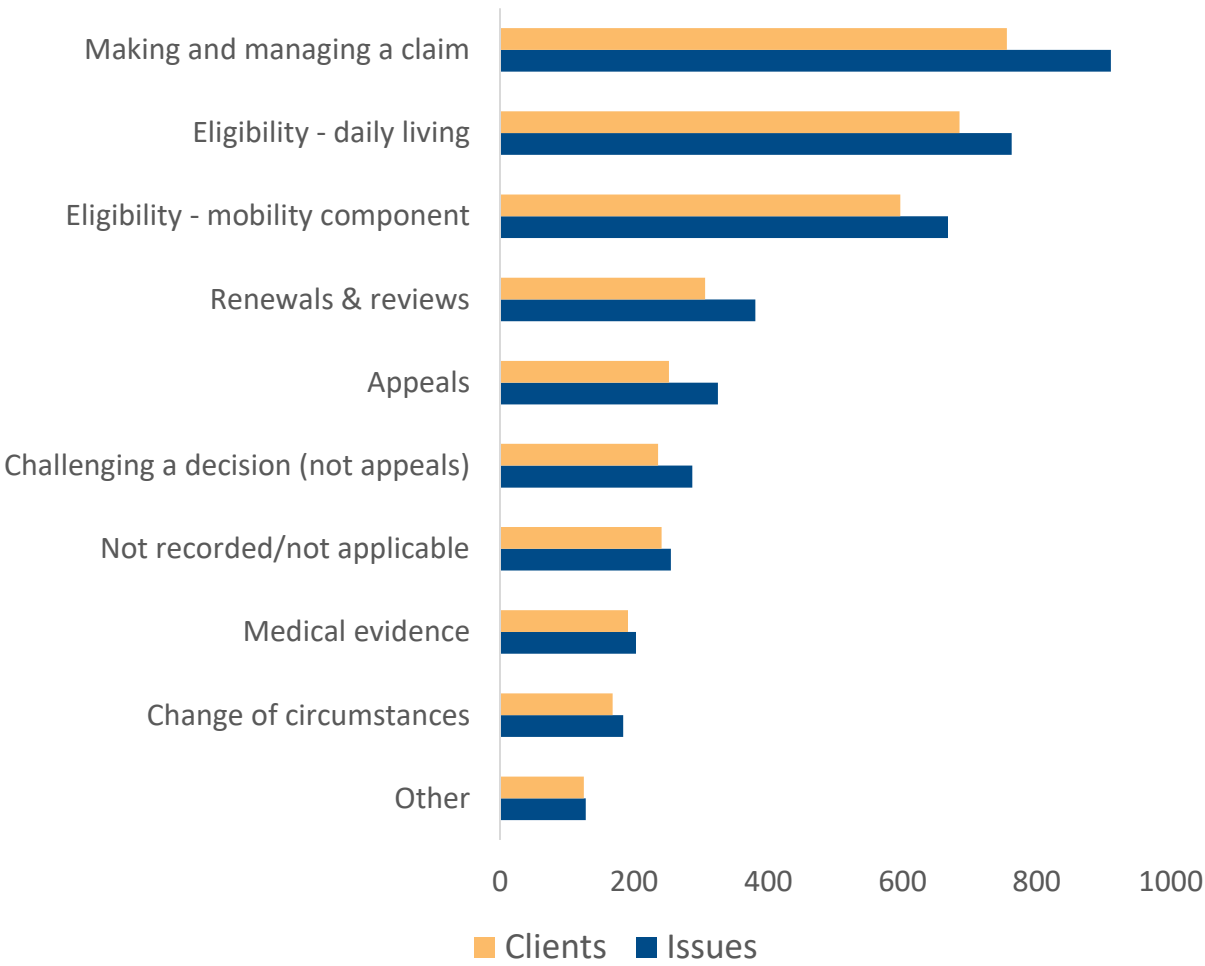


# Drilling down – Top benefit issues

Benefits and tax credits - subject

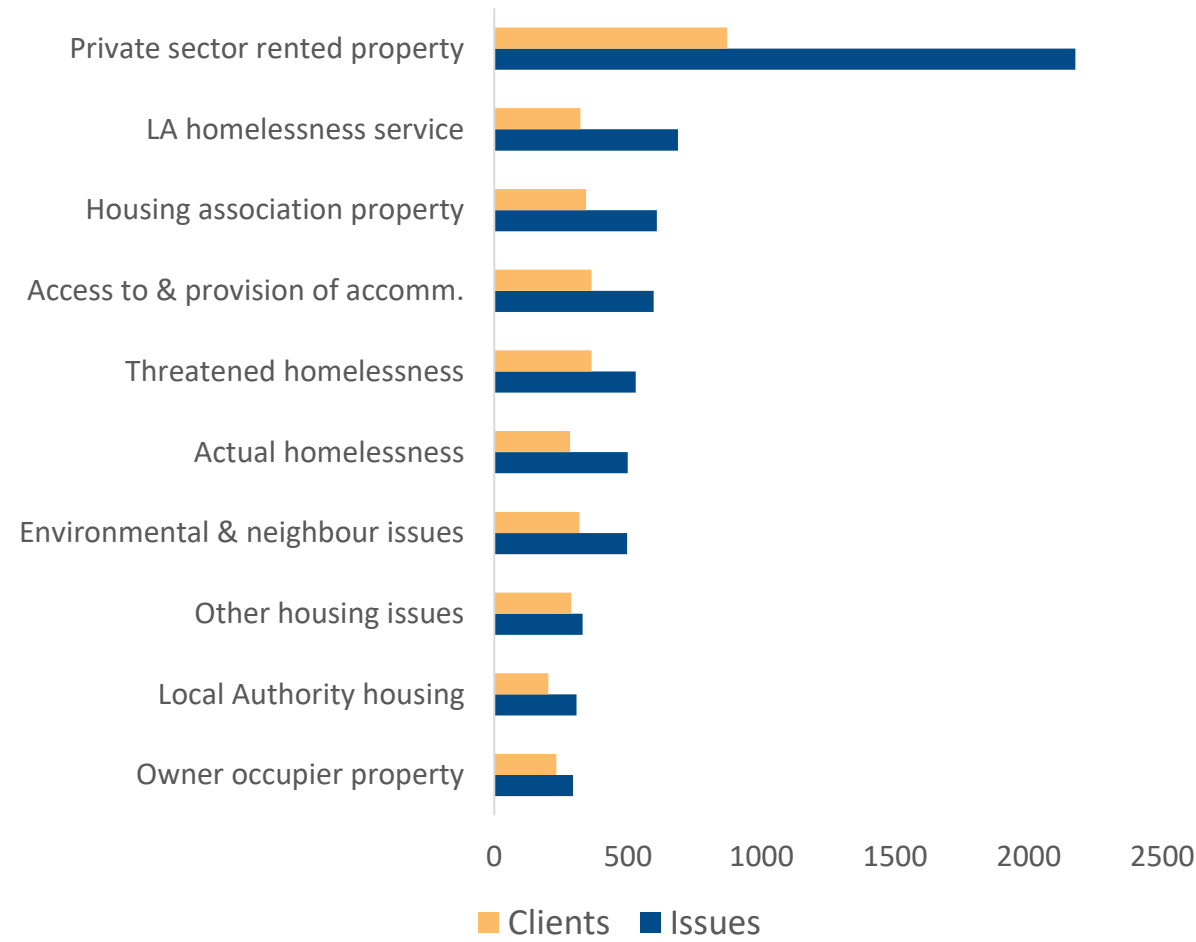


Personal Independence Payment - detail

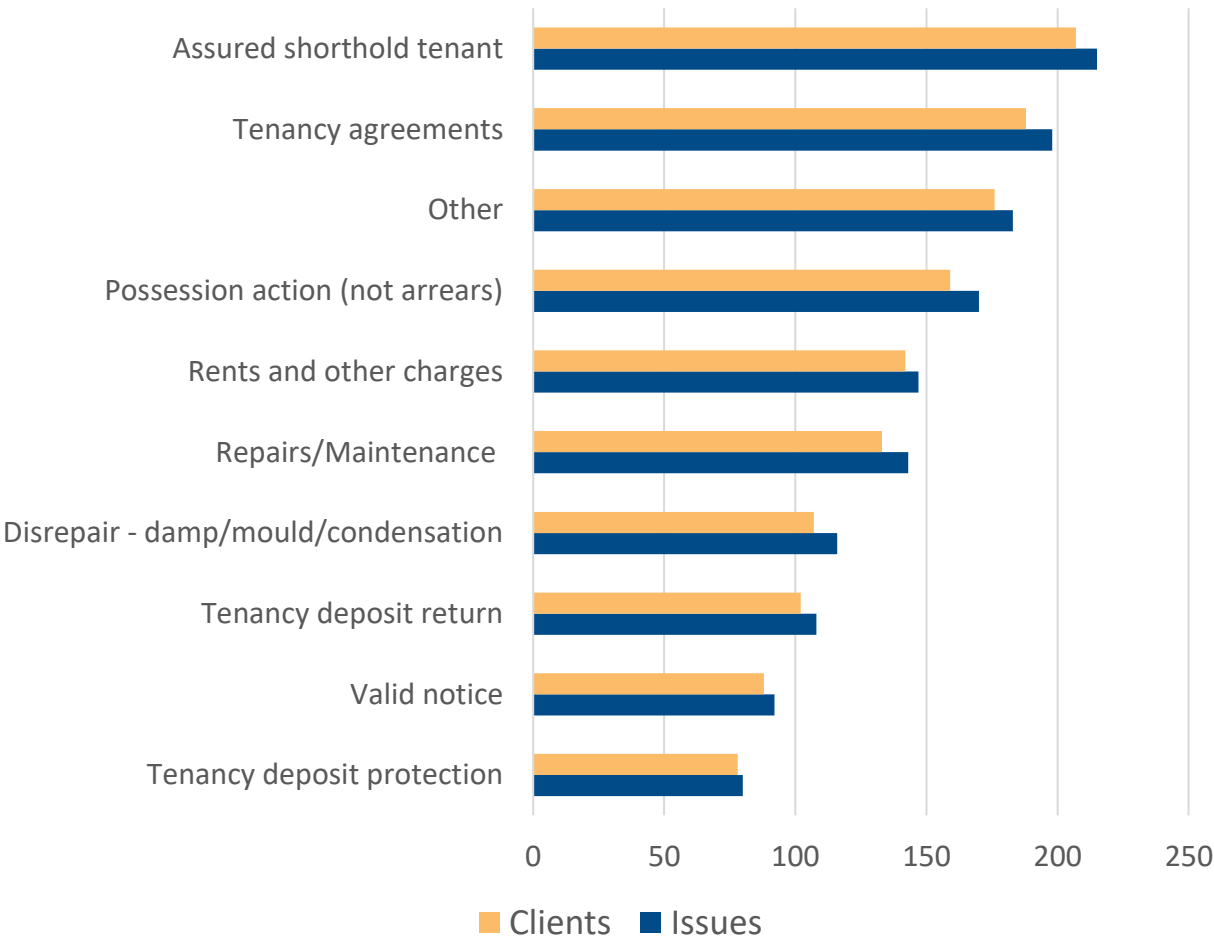


# Drilling down – Top housing issues

Housing - subject



Private sector rented property – detail





# Trends – other issues

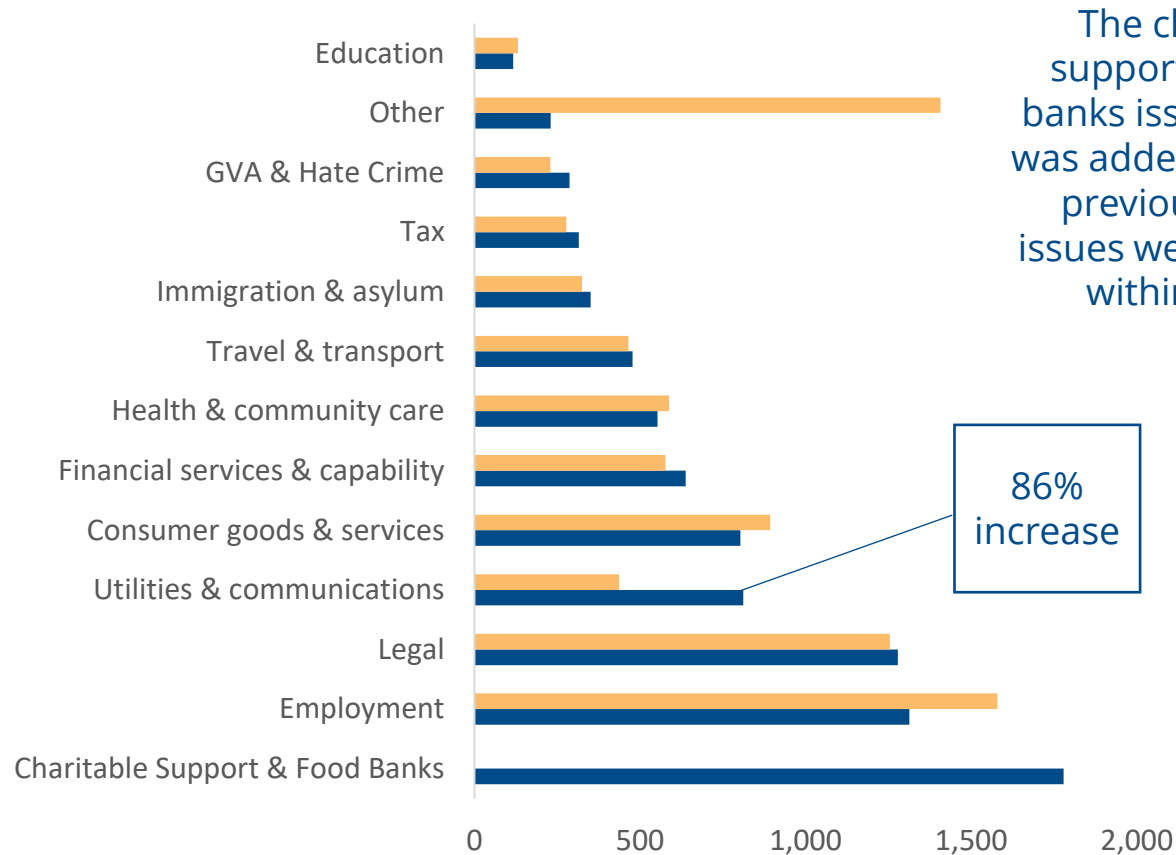
citizens  
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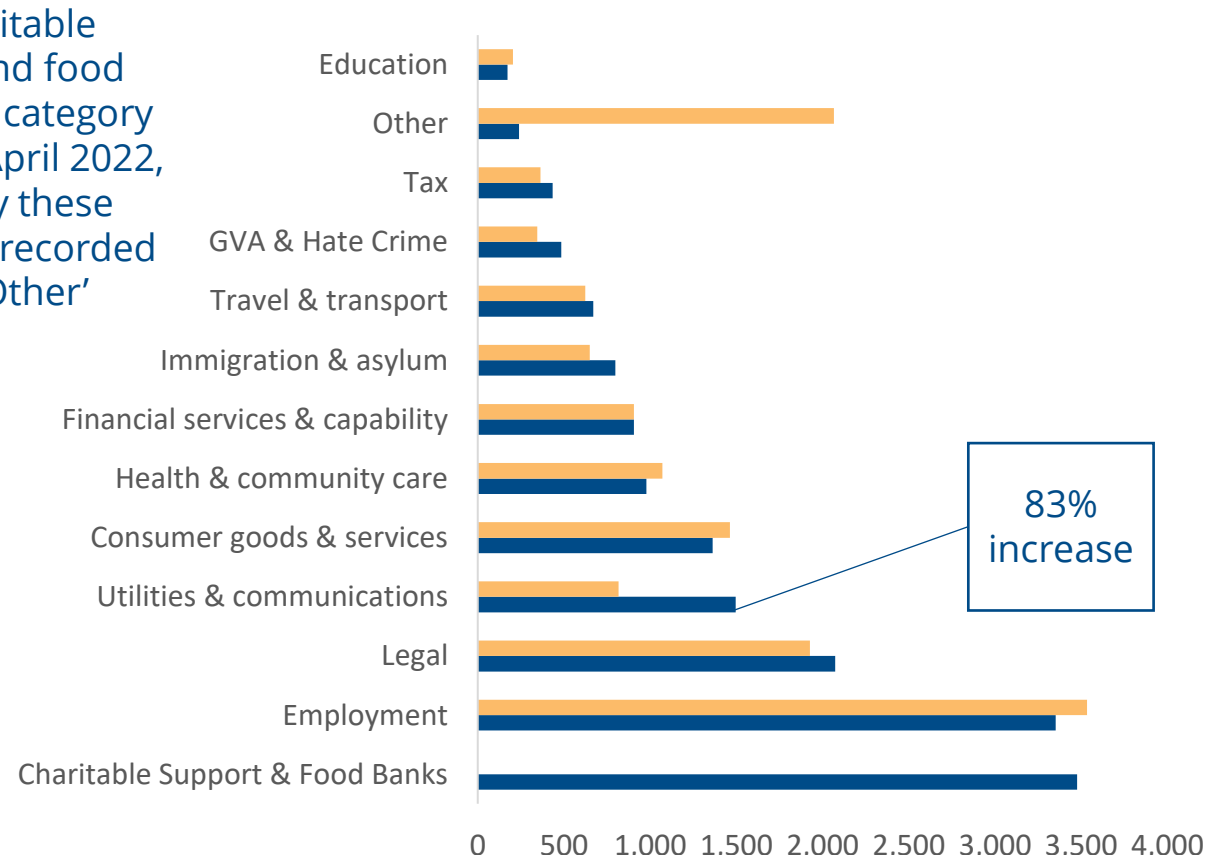
Comparing the number of issues across the two reporting periods shows how advice needs change over time.

■ 22/23 ■ 21/22

## Number of clients - category

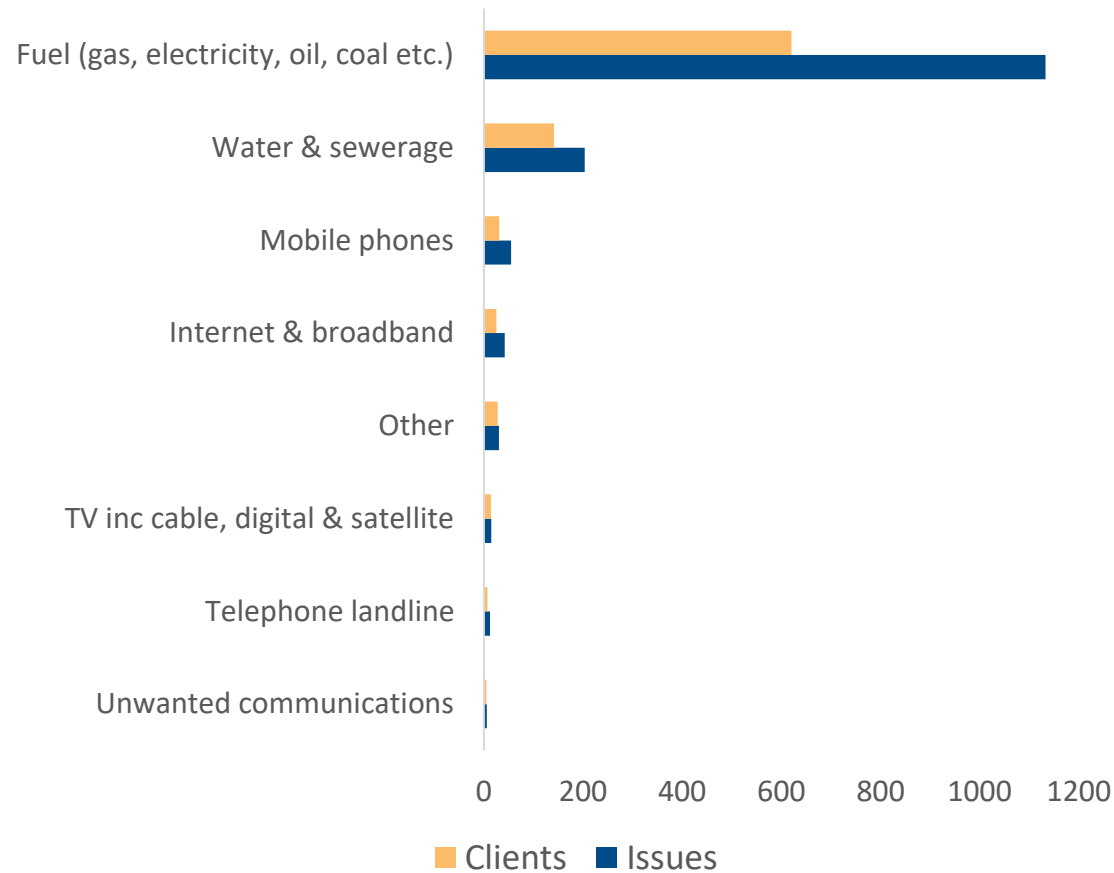


## Number of issues - category

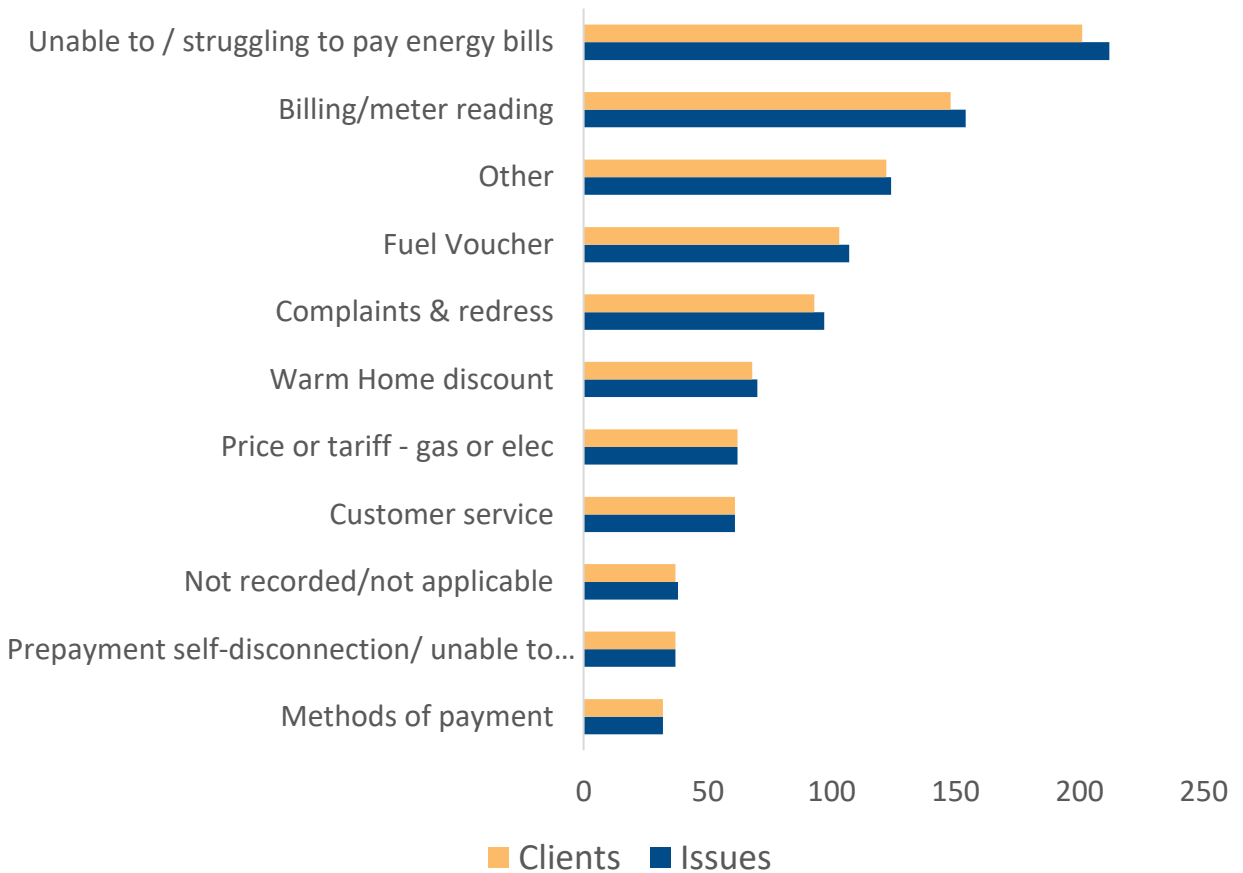


# Drilling down – Top utilities issues

Utilities & communications - subject



Fuel (gas, electricity, oil, coal etc.) - detail



# Issues: demography

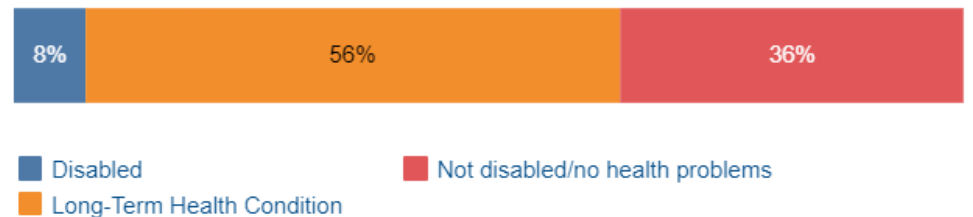
Our key stats show the demography of clients across the service. We can also look at this data for clients with particular issues.

These charts show the demography of clients who were advised on **debt** issues by our core service advisers.

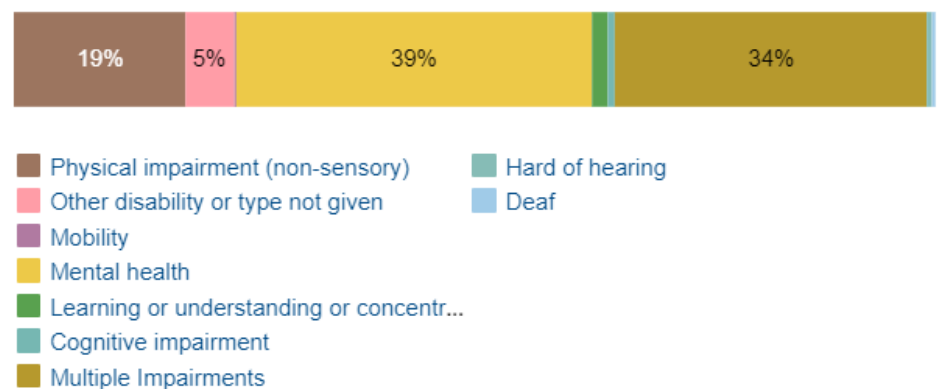
Gender



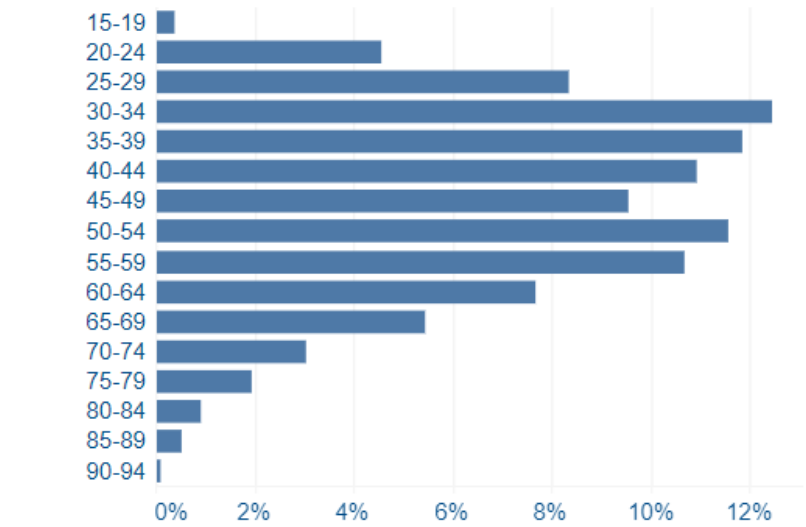
Disabled / Long term health condition



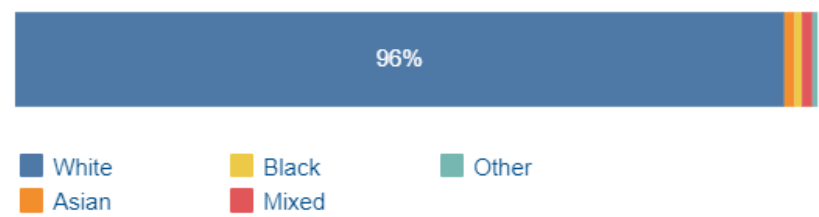
Type of disability (% of disabled clients)



Age



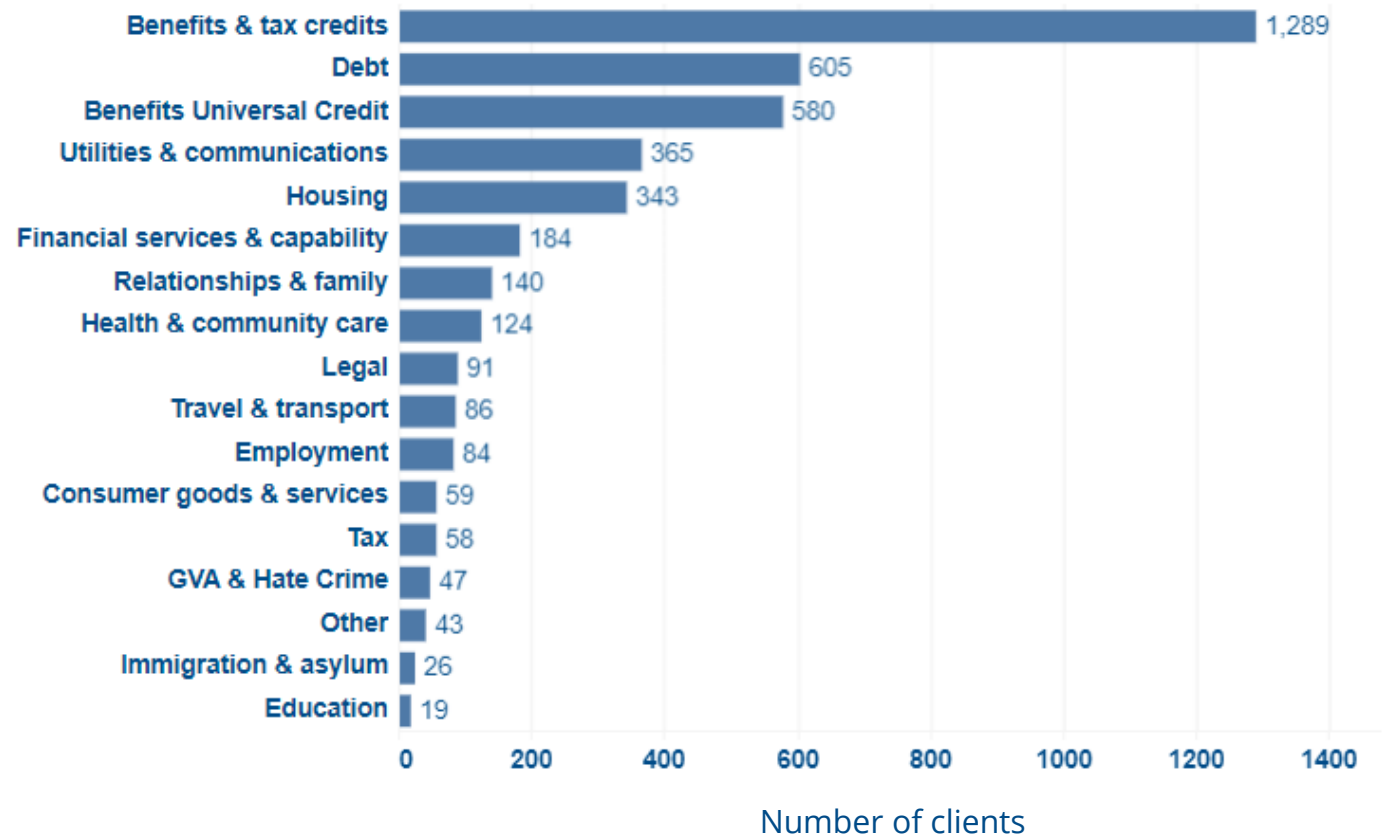
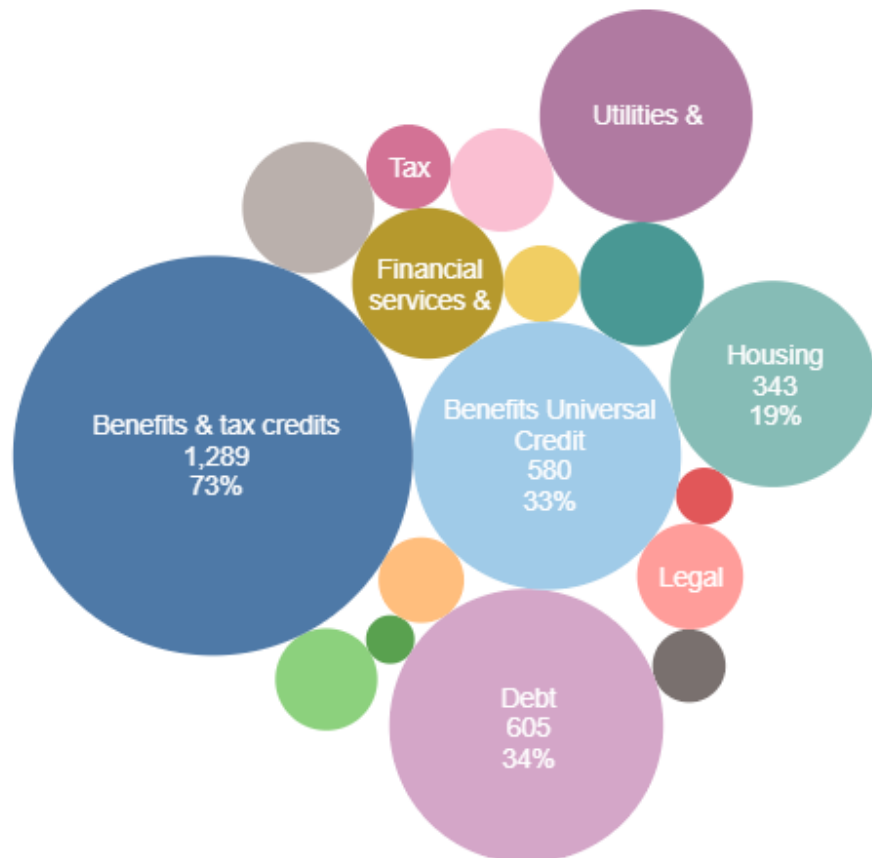
Ethnicity



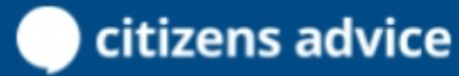
# What issues co-exist for clients?

We use cluster reports to look at issues that coexist for clients.

These charts show **clients who were also advised on other issues as well charitable support & foodbank issues**, across our whole service between 1<sup>st</sup> April 2022 – 31<sup>st</sup> March 2023.



# Issues: interactive report



The data we collect about the issues our clients face is vast and complex.

We have worked with our national colleagues to create an [interactive report](#) so you can look for the data most relevant to you. This is updated every month.

We welcome feedback!

## Advice trends

Explore anonymous data from the Citizens Advice charities that serve Somerset



**See the problems  
people have**



**Search by issue, sub  
issues and office**



**Examine the changes  
over time**

This data is updated monthly. It is gathered from the five independent, local Citizens Advice charities who give advice across Somerset; helping people directly - face to face, on the phone and by email.

# Quality of advice

We use the QAA framework to ensure our work maintains good standards.

Sample cases are reviewed for **accuracy and appropriateness of advice** and **case administration** by considering:

- How well the needs of the client have been understood and what their issues were.
- How the advice and information given was researched, to ensure accuracy and relevancy.
- Whether there were related or missed advice issues and how they impacted on the client.
- Whether the right next steps were agreed with the client.

These cases are scored to enable conversation between advisers, supervisors and the quality team about how to work together to ensure that clients get the best advice we can give.

During the financial year 22/23, we received the highest ranking for both **accuracy and appropriateness of advice** and **case administration** - more than 73% of cases.

# Our people

The team delivering our service between 1<sup>st</sup> April 2022 – 31<sup>st</sup> March 2023:

84  
paid staff

120  
volunteers

# Volunteers

We asked our volunteers why they volunteer for Citizens Advice so we could bring their voices directly to you:

"I like being part of a team; we all bring something different, so have different views. This makes for a great support network. I need the mental challenge. I enjoy seeing clients take back control"

"The work is so important and is needed during cost of living more than ever. It is a very supportive environment. The training is extensive and there is a very clear process to the work"

"To help others to feel supported and know they have somewhere and someone to turn to."

"Supporting others, using my skills and experience, working in a team. Making a contribution and feeling positive."

"In order to try and continue to be useful and have some meaningful activity beyond retirement age. For contact with other people"

"To help citizens in my local area. To contribute to improving life for citizens nationally through data provided. To be part of a group who have similar objectives"

"To help people in my community access public services that they would otherwise struggle without"

"Helps my community while keeping my brain active. Doing something useful in retirement. My work is valued by clients and supervisors / managers."



# Volunteer impact

To help our volunteers understand their impact we asked them to put themselves 'in the shoes' of someone they helped in the last 6 months and to describe how the client felt before and after advice.

## Before Advice:

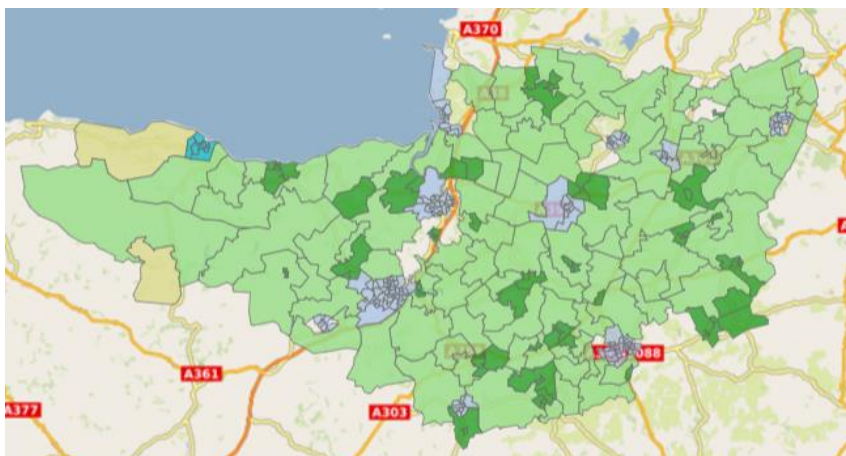


## After Advice:



# Rural/urban dashboard

- urban city and town
- urban city and town in a sparse setting
- rural town and fringe
- Rural village
- rural town and fringe in a sparse setting



Urban 60%	Rural 40%
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	%	Clients
Urban	60%	11,145
Rural	40%	7,530
<b>Grand Total</b>	<b>100%</b>	<b>18,675</b>

	%	Clients
Urban city and town	57%	10,640
Urban city and town in a sparse setting	3%	505
Rural town and fringe	19%	3,629
Rural Village	20%	3,816
Rural town and fringe in a sparse setting	0%	85
<b>Grand Total</b>	<b>100%</b>	<b>18,675</b>

Gender	Urban	Rural	All
Female	59%	60%	59%
Male	41%	40%	41%
Prefer different term (Other)	0%	0%	0%

Disability	Urban	Rural	All
Disabled	10%	9%	10%
Long-Term Health Condition	51%	51%	51%
Not disabled/no health problems	39%	40%	40%

Age Group (group)	Urban	Rural	All
<26	5%	4%	5%
25-29	9%	6%	8%
30-34	10%	8%	9%
35-39	10%	8%	9%
40-44	9%	7%	8%
45-49	8%	7%	8%
50-54	9%	9%	9%
55-59	9%	11%	10%
60-64	9%	11%	10%
>64	20%	29%	24%

	Urban city and town	Urban city and town in a sparse setting	Rural town and fringe	Rural Village	Rural town and fringe in a sparse setting
Benefits & tax credits	55%	4%	20%	21%	1%
Benefits Universal Credit	58%	2%	20%	19%	0%
Charitable Support & Food B..	65%	3%	17%	15%	1%
Consumer goods & services	57%	2%	20%	21%	0%
Debt	61%	3%	19%	16%	1%
Education	64%	2%	17%	16%	1%
Employment	60%	2%	17%	20%	0%
Financial services & capability	54%	2%	19%	24%	1%
GVA & Hate Crime	63%	1%	19%	16%	0%
Health & community care	56%	3%	17%	23%	1%
Housing	60%	2%	18%	19%	0%
Immigration & asylum	70%	1%	14%	15%	0%
Legal	58%	1%	19%	21%	0%
Other	53%	3%	18%	25%	1%
Relationships & family	60%	2%	19%	20%	0%
Tax	60%	2%	19%	19%	0%
Travel & transport	50%	1%	23%	26%	0%
Utilities & communications	59%	3%	18%	18%	1%
<b>Grand Total</b>	<b>57%</b>	<b>3%</b>	<b>19%</b>	<b>20%</b>	<b>0%</b>

## Top 15 wards by number of core clients helped:

District Ward	District LA	Number of clients helped
Priorswood	Somerset West and Taunton	349
Yeovil College	South Somerset	308
Yeovil Lyde	South Somerset	302
Victoria	Somerset West and Taunton	296
Halcon & Lane	Somerset West and Taunton	288
Yeovil Westland	South Somerset	287
Yeovil Summerlands	South Somerset	277
Highbridge and Burnham Marine	Sedgemoor	253
Blackbrook & Holway	Somerset West and Taunton	225
West Monkton & Cheddon Fitzpaine	Somerset West and Taunton	223
Bridgwater Westover	Sedgemoor	219
Watchet & Williton	Somerset West and Taunton	211
Shepton East	Mendip	210
Wellsprings & Rowbarton	Somerset West and Taunton	197
Comeytrove & Bishop's Hull	Somerset West and Taunton	192

# Top wards

## Top 15 wards by number of whole service clients helped:

District Ward	District LA	Number of clients helped
Priorswood	Somerset West and Taunton	457
Yeovil Lyde	South Somerset	443
Yeovil College	South Somerset	441
Yeovil Summerlands	South Somerset	397
Yeovil Westland	South Somerset	396
Halcon & Lane	Somerset West and Taunton	372
Victoria	Somerset West and Taunton	343
Highbridge and Burnham Marine	Sedgemoor	309
Crewkerne	South Somerset	289
Watchet & Williton	Somerset West and Taunton	287
Blackbrook & Holway	Somerset West and Taunton	282
West Monkton & Cheddon Fitzpaine	Somerset West and Taunton	278
Bridgwater Westover	Sedgemoor	262
Brympton	South Somerset	253
Wellsprings & Rowbarton	Somerset West and Taunton	241