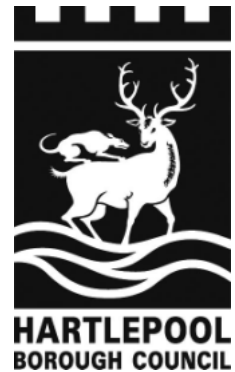


# **SCRUTINY COORDINATING COMMITTEE AGENDA**



**Friday 28<sup>th</sup> January 2011**

**at 2.00 pm**

**in the Council Chamber,  
Civic Centre, Hartlepool**

**MEMBERS: SCRUTINY COORDINATING COMMITTEE:**

Councillors C Akers-Belcher, S Akers-Belcher, Cook, Cranney, Flintoff, Griffin, James, London, A Marshall, McKenna, Preece, Richardson, Shaw, Simmons, Thomas and Wells.

Resident Representatives: Evelyn Leck, Linda Shields and Angie Wilcox

- 1. APOLOGIES FOR ABSENCE**
- 2. TO RECEIVE ANY DECLARATIONS OF INTEREST BY MEMBERS**
- 3. MINUTES**
  - 3.1 To confirm the minutes of the meeting held on 14<sup>th</sup> January 2011 (*to follow*)
- 4. RESPONSES FROM THE COUNCIL, THE EXECUTIVE OR COMMITTEES OF THE COUNCIL TO REPORTS OF THE SCRUTINY COORDINATING COMMITTEE**

No Items
- 5. CONSIDERATION OF REQUEST FOR SCRUTINY REVIEWS FROM COUNCIL, EXECUTIVE MEMBERS AND NON EXECUTIVE MEMBERS**

No Items
- 6. FORWARD PLAN**

No Items

**7. CONSIDERATION OF PROGRESS REPORTS / BUDGET AND POLICY FRAMEWORK DOCUMENTS**

No Items

**8. CONSIDERATION OF FINANCIAL MONITORING/CORPORATE REPORTS**

No Items

**9. ITEMS FOR DISCUSSION**

**The Provision of Face to Face Financial Advice and Information Services in Hartlepool**

9.1 Evidence from the Member of Parliament for Hartlepool:-

- (a) Covering Report – *Scrutiny Manager; and*
- (b) Verbal evidence from the Member of Parliament for Hartlepool.

9.2 Evidence from Providers and Navigators in Hartlepool:-

- (a) Covering Report – *Scrutiny Manager; and*
- (b) Evidence from Providers and Navigators in Hartlepool.

**10. CALL-IN REQUESTS**

**11. ANY OTHER ITEMS WHICH THE CHAIRMAN CONSIDERS ARE URGENT ITEMS FOR INFORMATION**

- i) **Date of Next Meeting Friday 25<sup>th</sup> February 2011, commencing at 2.00 pm in the Chamber**

## SCRUTINY CO-ORDINATING COMMITTEE

28 January 2011



**Report of:** Scrutiny Manager

**Subject:** PROVISION OF FACE TO FACE FINANCIAL ADVICE AND INFORMATION SERVICES IN HARTLEPOOL - EVIDENCE FROM THE MEMBER OF PARLIAMENT FOR HARTLEPOOL - COVERING REPORT

---

### 1. PURPOSE OF REPORT

- 1.1 To inform Members of the Forum that the Member of Parliament for Hartlepool has been invited to attend this meeting to provide evidence in relation to the investigation into 'The Provision of Face to Face Financial Advice and Information Services in Hartlepool'.

### 2. BACKGROUND INFORMATION

- 2.1 The Member of Parliament for Hartlepool has been invited to this meeting to provide evidence to the Forum in relation to his views on the provision of face to face advice and information services in Hartlepool.
- 2.2 During this evidence gathering session it is suggested that responses should be sought to the following key questions:-
- (a) What are your views on the level and quality of Face to Face Financial Advice and Information Services in Hartlepool?
  - (b) How effective do you feel the current provision of these services is in Hartlepool?
  - (c) What are your views on how these services could continue to be provided within the current economic climate and available resources?
  - (d) Do you have any suggestions as to how current or future services can be delivered more effectively and efficiently?
  - (e) What areas of improvement, if any, would you suggest for the Council to deal with child poverty and financial exclusion in Hartlepool?

### **3. RECOMMENDATION**

- 3.1 That Members of the Forum consider the views of the Member of Parliament for Hartlepool in relation to the questions outlined in section 2.2.

Contact Officer:- Joan Stevens – Scrutiny Manager  
Chief Executive's Department - Corporate Strategy  
Hartlepool Borough Council  
Tel: 01429 284142  
Email: joan.stevens@hartlepool.gov.uk

### **BACKGROUND PAPERS**

The following background paper was used in preparation of this report:-

- (i) Report of the Scrutiny Manager entitled 'Scrutiny Investigation into the Provision of Face to Face Financial Advice and Information Services in Hartlepool - Scoping Report' presented to the Scrutiny Co-ordinating Committee on 3 September 2010
- (ii) Report of the Extended Services and Early Years Manager / Hartlepool Financial Inclusion Partnership Development Officer entitled 'The Provision of Face to Face Financial Advice and Information Services in Hartlepool - Setting the Scene Report' presented to the Scrutiny Co-ordinating Committee on 15 October 2010

## SCRUTINY CO-ORDINATING COMMITTEE

28 January 2011



**Report of:** Scrutiny Manager

**Subject:** PROVISION OF FACE TO FACE FINANCIAL ADVICE AND INFORMATION SERVICES IN HARTLEPOOL – EVIDENCE FROM PROVIDERS AND NAVIGATORS IN HARTLEPOOL – COVERING REPORT

---

### 1. PURPOSE OF THE REPORT

- 1.1 To inform Members that representative's from a variety of groups / bodies that navigate residents to, and provide, face to face financial advice and information services in Hartlepool will be in attendance at today's meeting to contribute to the Committee's ongoing investigation.

### 2. BACKGROUND INFORMATION

- 2.1 Members will recall that at the meeting of this Committee on 3 September 2010, the Terms of Reference and Potential Areas of Inquiry / Sources of Evidence were approved by the Committee for this scrutiny investigation. As relevant sources of evidence Members identified the need to seek evidence and views from groups and bodies in Hartlepool who provide, and navigate residents to, the face to face financial advice and information services available in Hartlepool.
- 2.2 In accordance with the wishes of the Committee, invitations have been extended to a variety of groups and confirmation received that the following will be in attendance at today's meeting:-

(a) Providers:

- Hartlepool Citizens Advice Bureau (**Appendices B, C and D**)
- West View Advice and Resource Centre
- Connected Care
- Job Centre Plus (subject to availability)

(b) Navigators:

- Age UK Teesside
- TMJ Legal Services
- The Families Information Service (**Appendix A**)
- The Albert Centre
- Job Smart

2.3 In inviting today's meeting each of these organisations has been asked to consider the following questions:-

(a) What / how you provide your services;

(b) Would you have (or be willing to provide) any anonymous case studies to demonstrate:-

- (i) Your processes and practices;
- (ii) Positive outcomes of the help you have given; and
- (iii) Instances where there have been problems (this could help the Committee gain an understanding of the issues you face and look for potential solutions).

(c) Your views on the work being undertaken in Hartlepool on this issue, including partnership working; and

(d) How you feel the provision of these services could be improved in the future (taking into consideration potential budgetary restrictions).

2.4 Please note that these questions are only intended to form a starting point for discussions with the representatives present and all other questions and views will be welcomed. At the time that this report being circulated confirmation of availability had not been received from all of the groups / bodies invited (those others invited being as follows) and as such others may be in attendance on the day of the meeting:-

Parents in Need of Support  
North of England Refugee Service  
Hartlepool Carers  
Epilepsy Outlook  
Hartlepool MIND  
Hartlepool Special Needs Group  
PATCH  
The ORB Centre  
Hartlepool and District Dyspraxia Support Group  
B76

2.5 Should Members wish an invitation to be extended to any other groups, who were not previously identified as part of the scoping process, please do not hesitate to contact the Scrutiny Manager before today's meeting who will endeavour to facilitate this.

### **3. RECOMMENDATION**

- 3.1 That Members note the content of both this report and evidence provided by those representative's present from other groups and bodies in Hartlepool, seeking clarification on any relevant issues where felt appropriate.

Contact Officer:- Joan Stevens – Scrutiny Manager  
Chief Executive's Department - Corporate Strategy  
Hartlepool Borough Council  
Tel: 01429 284142  
Email: joan.stevens@hartlepool.gov.uk

### **BACKGROUND PAPERS**

The following background paper was used in preparation of this report:-

- (i) Report of the Scrutiny Manager entitled 'Scrutiny Investigation into the Provision of Face to Face Financial Advice and Information Services in Hartlepool - Scoping Report' presented to the Scrutiny Co-ordinating Committee on 3 September 2010
- i. Report of the Extended Services and Early Years Manager / Hartlepool Financial Inclusion Partnership Development Officer entitled 'The Provision of Face to Face Financial Advice and Information Services in Hartlepool - Setting the Scene Report' presented to the Scrutiny Co-ordinating Committee on 15 October 2010

**Provision of Face to Face Financial Advice and Information Services in Hartlepool - Scrutiny Investigation Notes**

*In summary the overall aim of the scrutiny investigation is to explore and understand the key issues / factors relating to the provision of face to face advice and information services in the town and, in doing this, the Committee is looking to:-*

- (a) To gain an understanding of how 'face to face' financial advice and information services are provided in Hartlepool (including areas of partnership working);*
- (b) To examine how effective / efficient the provision of 'face to face' financial advice and information services in Hartlepool are in meeting the needs of Hartlepool residents;*
- (c) To seek the views of service users and the groups / bodies that are responsible for the provision of 'face to face' financial advice and information services in Hartlepool;*
- (d) To identify and compare examples of good practice in the provision of face to face financial advice and information services;*
- (e) To gain an understanding of the impact of current and future budget pressures on the way in which face to face financial advice and information services are provided in Hartlepool; and*
- (f) To explore how face to face financial advice and information services could be provided in the future, giving due regard to:-*
  - (i) Improving the effectiveness and efficiency of the way in which the service is currently provided; and*
  - (ii) If / how the service could be provided at a reduced financial cost (within the resources available in the current economic climate).*

*I am hoping that you will be able to assist in terms of providing information in relation to your work in relation to this issue. In particular:*

**What / how you provide your services;**

FISH is part of the Childcare Market Team which in turn is part of the larger Sure Start, Extended Services and Early Years team. The team is part of the Performance and Achievement team within Child and Adult Services Department of Hartlepool Borough Council.

FISH fulfils the statutory requirements of the Childcare Act 2006 section 12.

The FISH team consists of



- two Information Officers delivering frontline and outreach service, maintaining and updating provider records and supporting administration
- one Information Officer updating, maintaining and developing the FISH website “The Directory”.
- one Manager, who oversees operations across the Childcare Market Team including FISH and ensures quality and Key Performance Indicators are maintained and promotes the service to other partner organisations.

Originally set up in 2000 as “Jigsaw” under the Early Years and Development Childcare Partnership and later changing name to “Children’s Information Service”, the organisation has been under the jurisdiction of the Local Authority Education Department which has ultimately become Child and Adult Services. The current name change came about in 2008 to reflect a changing remit.

To begin with the service provided a telephone helpline between 10am and 1pm Monday to Friday, extending to a shop front service within Hartlepool Borough Council’s Civic Centre and eventually expanding to offer services from 9am to 5pm Monday to Friday in a shop front within the Central Library. Along the way, increasing from employing one part time member of staff and a Manager to four full time members of staff.

Providing information, advice and guidance services to parents, parents to be, carers, mothers, fathers and grandparents of children aged 0 to 19 is the mainstay of FISH’s work. This requires the maintenance of a specialist database (Evince) that holds details of childcare, play opportunities, positive activities and services for children and families and links to other sources of relevant information including financial support towards the cost of childcare and other benefits families can receive.

This database facilitates the download of childcare data from Ofsted and the upload of information to our website “The Directory” and Families Information Directory (FIDy) channel partners.

FISH holds the only official database of registered childcare, that is informed by the regulatory body “Office for Standards in Education” (Ofsted). In addition due to the relationship FISH has with childcare providers this information is enhanced and maintained to a high standard.

We take information out into the community directly through our wide ranging partners, for their clients’ benefit and also to assist practitioners to refer to FISH where suitable.

**Would you have (or be willing to provide) any anonymous case studies to demonstrate:-**

**(i) Your processes and practices;**

A typical enquiry is made either face-to-face within the Central Library or over the telephone. Details of parent's requirements are taken and every client is asked if they are claiming the basic Child Tax credits and if not are encouraged to do so.

If the enquiry relates specifically to childcare the Childcare Element of the Child Tax Credit is discussed and again parents are advised of the assistance they can get in making the claim. This may entail a minimal input of referring directly to the Tax Credits Helpline, however we will refer to Jobcentreplus, CAB or WVARC for further in depth advice if required using their standard referral forms or in the case of Jobcentreplus booking an appointment with an adviser.

During the previous 12 months we have referred 28 families to organisations such as WVARC, CAB and Children's Centres where all or part of the package of support involved financial assistance. During any enquiry we aim to build rapport with parents and find that although they do not present initially with a financial issue this can be identified during the course of the conversation.

We have also booked 34 appointments with the Jobcentreplus advisor based in our office from April 2010 to December 2010.

**(ii) Positive outcomes of the help you have given;**

We do not have complete records as once a referral is made to an organisation the client very rarely comes back to us. The outcomes will be recorded by the organisation.

**(iii) Instances where there have been problems (this could help the Committee gain an understanding of the issues you face and look for potential solutions).**

No specific problems have been recorded, however we are aware that there are long waiting periods for both CAB and WVARC and therefore promote our Jobcentreplus advisor where benefits are the main issue as appointments can usually be organised within a week.

**Your views on the work being undertaken in Hartlepool on this issue, including partnership working**

We have developed a number of partnerships with crucial partners, such as Jobcentreplus and Hartlepool Financial Inclusion Partnership (HFIP). These partnerships make it easy to refer into services and keep up to date on what is happening within these organisations. Within HBC we rely on the expertise of staff in the Housing Benefit and Council Benefit teams to advise clients as appropriate.

We currently work alongside a Jobcentreplus outreach advisor half a day per week. We refer clients and book appointments for them to meet the advisor who can then advise accurately of the amount of Tax Credits the family are entitled to and highlight other benefits. This service is increasingly used by parents through our referrals and selfreferrals where we have made parents aware of the service.

Through our work with HFIP we have contributed to and distribute the “Money Matters” information booklet to our clients.

These types of partnerships with statutory, voluntary and private organisations allow us to refer appropriately and provide specialist advice to a wide range of clients.

This is good for our clients and our service and continued partnership working and sharing of information is the way forward.

**- How you feel the provision of these services could be improved in the future (taking into consideration potential budgetary restrictions).**

10 Staff members from the Sure Start, Extended Services and Early Years team are due to attend basic benefits advice training being delivered by the Child Poverty Action Group (CPAG) in March following an introductory session in 2010 delivered to 20 multi-agency staff. CPAG have been funded to work closely with Sure Start staff in order to ensure families with young children are getting appropriate financial advice.

This training will enable staff to better assess clients situation and to raise awareness of benefits available. The intention is to provide low level signposting to the most appropriate organisation thus reducing some burden on more specialist in-depth services and providing an extra service to our own clients.

In addition the FISH staff are planning to re-locate into Children's Centres reducing overheads and being more accessible in local communities.

# HARTLEPOOL CITIZENS ADVICE BUREAU



## CLIENT PROFILE SURVEY (MAY 2010 – JULY 2010)

Designed and layout by Julie Malpass  
(Hartlepool CAB)

# INTRODUCTION

It is a requirement of our membership of the Citizens Advice Service that we carry out periodical client profile surveys. At the Hartlepool CAB, we undertake such surveys every two years and also combine questions about our clients personal and financial circumstances with questions about their experience of using our service.

This report summaries the results of our most recent client profile survey which was carried out during the months of May, June and July 2010. We asked 400 clients to assist with the survey following the conclusion of their interviews at our offices. The Bureau also used information from our standard client enquiry sheet to gather information for the survey. A copy of the standard survey form and the client enquiry sheet are at Appendix 1 & 2.

The results of this survey enable us to examine our service to try and ensure that it meets the needs of the local community and also to assess to what extent we are assisting all groups within the community. The overall results of this most recent survey shows that we advise and assist a broad cross section of people from the local community and that there is a very high level of satisfaction with the ability to access our service and also with the advice and assistance that we give clients.

At Appendix 3 we have summarised all of the suggestions made by clients for improving our office facilities and also for improving our general service. All of these suggestions will be considered by the Trustee Board.

Appendix 4 is a breakdown of which Local Authority Wards our clients come from.

JOE MICHNA  
BUREAU MANAGER

August 2010

Hartlepool Citizens Advice Bureau  
87 Park Road  
Hartlepool  
TS26 9HP

E-mail: [manager@hartlepool.cabnet.org.uk](mailto:manager@hartlepool.cabnet.org.uk)

Website: [www.hartlepool-cab.co.uk](http://www.hartlepool-cab.co.uk)

Ex-directory No: 01429 268242 (Not Advice Line)

Fax No: 01429 868803



## QUESTION 1

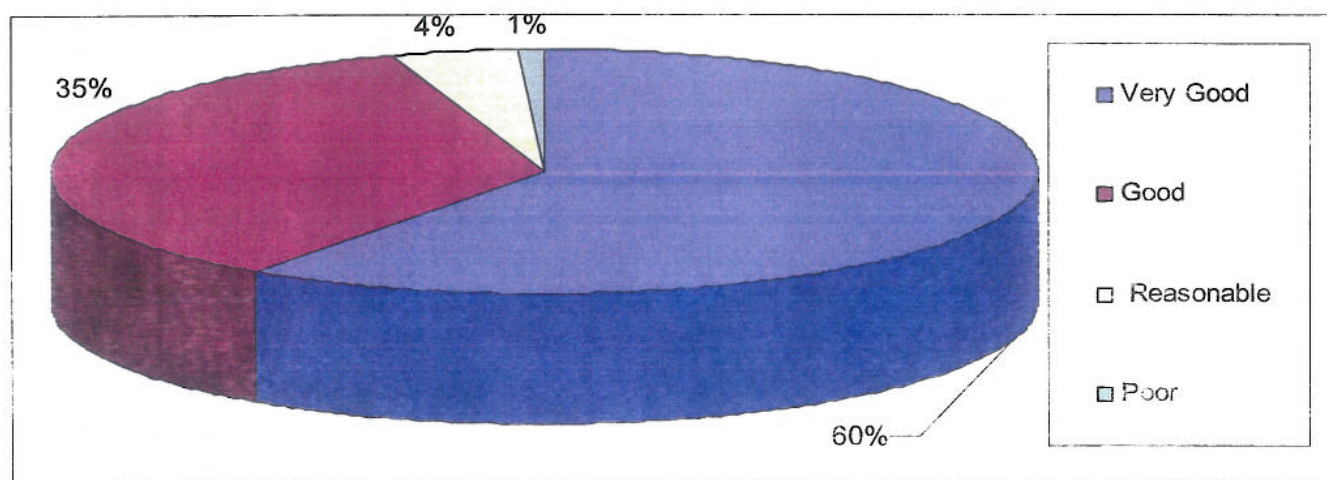
Have you been to the Hartlepool CAB before?

• Been Before	224	56%
• New Clients	176	44%

## QUESTION 2

How do you rate our office facilities?

• Very Good	240	60%
• Good	140	35%
• Reasonable	17	4%
• Poor	3	1%



## QUESTION 3

Are there any areas in which we can improve these facilities for clients?

• Yes	14	3%
• No	386	97%

(For a summary of the suggestions clients made on how we can improve our facilities, see Appendix 3)

#### QUESTION 4

Male or Female?

• Male	190	49%
• Female	210	51%

#### QUESTION 5

Which age group are you in?

• Under 20	26	6%
• 20 - 24	69	18%
• 25 - 44	135	34%
• 45 - Under Pension Age	90	22%
• Pension Age or Over	81	20%

#### QUESTION 6

Are you currently:

• Single	133	33%
• Married/Living as a Couple	170	42%
• Divorced/Separated	63	16%
• Widowed	34	9%

#### QUESTION 7

Are any children aged under 16 living with you?

• Yes	167	42%
• No	233	58%

## QUESTION 8

Are any young people aged 16 or over living with you?

• Yes	92	23%
• No	308	77%

## QUESTION 9

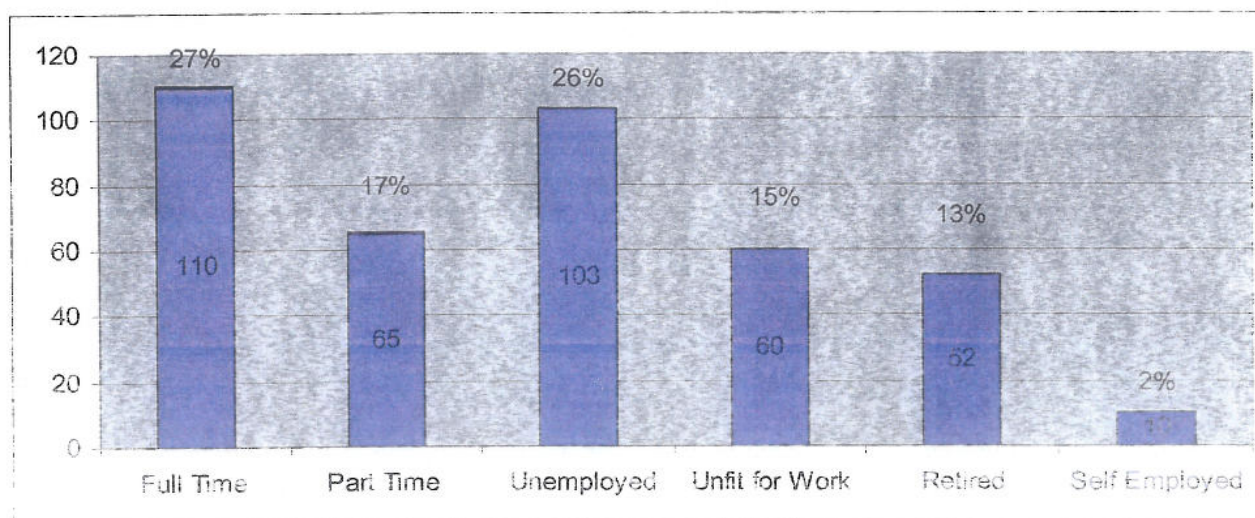
What kind of housing does your household have?

• Housing Hartlepool	76	19%
• Private Rented	80	20%
• Other Housing Association	25	6%
• Owner Occupier	182	46%
• Staying With Relatives/Friends	37	9%

## QUESTION 10

Are you:

• In Work Full Time (30 or more)	110	27%
• In Work Part Time (under 30 hours)	65	17%
• Unemployed	103	26%
• Unfit for Work	60	15%
• Retired	52	13%
• Self Employed	10	2%





## QUESTION 11

Is your household entitled to Income Support, Income-Based Jobseekers Allowance, Income-Based Employment and Support Allowance or Pension Credit?

• Yes	189	47%
• No	211	53%

## QUESTION 12

Does your household receive income from:

• Earnings only	89	22%
• Earnings and Benefits (including Tax Credits)	101	25%
• Welfare Benefits only	152	38%
• Any income which includes Pensions	55	14%
• Other Income	3	1%

## QUESTION 13

Would you describe yourself as:

• White	385	96%
• Black – African or Caribbean	5	1%
• Indian/Pakistani/Bangladeshi	6	2%
• Chinese	2	0.5%
• Other	2	0.5%

## QUESTION 14

Would you describe yourself as disabled?

• Yes	74	18%
• No	326	82%

### QUESTION 15

How long did it take you to get to our offices from home or work?

• Less than 15 minutes	207	52%
• 15 – 30 minutes	150	37%
• 30 minutes – 1 hour	23	6%
• More than 1 hour	20	5%

### QUESTION 16

How did you travel to the CAB today?

• Public Transport	125	31%
• Car/Taxi/Motorbike	180	45%
• Walking/Bike	95	24%

### QUESTION 17

Who suggested you came to the CAB with this enquiry?

• Self knowledge of CAB	244	61%
• Friend/Relative	85	21%
• Jobcentreplus/DWP	20	5%
• Local Authority Department	19	5%
• Court/Police	12	3%
• Solicitor	20	5%

### QUESTION 18

Is there anything that makes it difficult for you to use the Bureau?

• Yes	30	7%
• No	370	93%

## QUESTION 19

Do you have any health problems or disabilities which make it difficult for you to use the Bureau?

• Yes	25	6%
• No	375	94%

## QUESTION 20

How long did you wait to be seen by an Advice Worker?

• Under 5 minutes	48	12%
• 5 minutes - 15 minutes	143	36%
• 15 minutes - 30 minutes	122	31%
• 30 minutes - 45 minutes	56	14%
• 45 minutes - 1 hour	20	5%
• More than 1 hour	11	2%

## QUESTION 21

How long was your interview in our offices?

• Up to 15 minutes	140	35%
• 15 minutes – 30 minutes	120	30%
• 30 minutes – 45 minutes	101	25%
• 45 minutes – 1 hour	24	6%
• More than 1 hour	15	4%

## QUESTION 22

Are there any suggestions you have for improving the service we offer?

• Yes	19	5%
• No	381	95%

(For a summary of the suggestions clients made on how our service can be improved, see Appendix 3)

### QUESTION 23

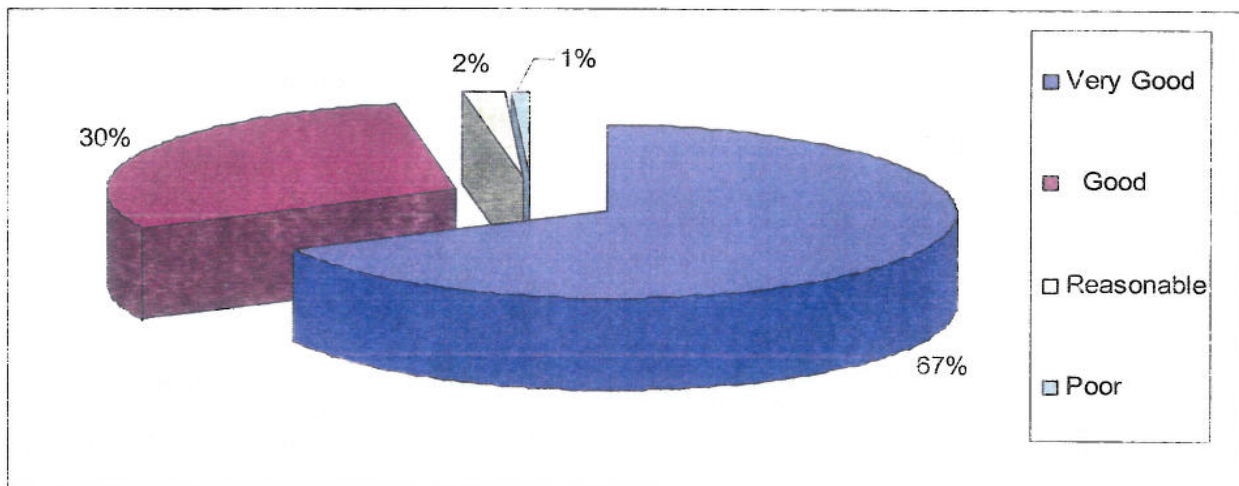
Did you know that the Bureau has a Complaints Procedure?

• Yes	190	48%
• No	210	52%

### QUESTION 24

How would you rate our service?

• Very Good	271	68%
• Good	118	29%
• Reasonable	8	2%
• Poor	3	1%



# APPENDIX I

<b>Part 1</b> <b>Please Complete Both Sides</b>		Date	For office use only Ref No:
Title: Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Mr <input type="checkbox"/> Other			
Christian Name:		Surname:	
Address: ..... ..... ..... Postcode:		Date of Birth: Nationality: Do you have a Disability? Yes <input type="checkbox"/> No <input type="checkbox"/> May we write to you at this address should this be necessary? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Telephone Number(s):  Home: ..... can we contact you/leave a message if necessary? Yes <input type="checkbox"/> No <input type="checkbox"/>  Mobile: ..... can we contact you/leave a message if necessary? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Is this the first time you have contacted the Hartlepool CAB regarding this particular enquiry? Yes <input type="checkbox"/> No <input type="checkbox"/>			

<b>Part 2 – The following information is optional but it would assist us in ensuring that we are delivering our service to all sections of the community.</b>			
Household type: (please tick)		single <input type="checkbox"/> couple <input type="checkbox"/>	single with children <input type="checkbox"/> couple with children <input type="checkbox"/>
How many children:		Age(s):	
<u>Employment Details: (please tick)</u>		<u>National Insurance No:</u> .....	
Employed (more than 30 hours per week) <input type="checkbox"/> Employed (less than 30 hours per week) <input type="checkbox"/> Unemployed <input type="checkbox"/> Self Employed <input type="checkbox"/>		Retired <input type="checkbox"/> Sick <input type="checkbox"/> Other <input type="checkbox"/>	
Have you ever been to the Bureau before for advice and assistance on any other matter? Yes <input type="checkbox"/> No <input type="checkbox"/>			



**HARTLEPOOL CITIZENS ADVICE BUREAU****CLIENT SURVEY**

Advice Worker's Name .....

Date .....

1 How do you rate the facilities in our office?	1 Very Good 2 Good 3 Reasonable 4 Poor
2 Are there any ways in which we can improve these facilities for our clients?	
3 Which Group are you in?	1 Under 20 2 20 – 24 3 25 – 40 4 40 – Under pension age 5 Pension age
4 Are you currently?	1 Single 2 Married/living as a couple 3 Divorced/separated 4 Widowed
5 Are any young people aged 16 or over living with you?	1 Yes 2 No
6 What kind of housing does your household have?	1 Housing Hartlepool 2 Private rented 3 Housing Association 4 Owner Occupied 5 Staying with relatives/friends 6 Other
7 Is your household entitled to Income Support/Income Based Jobseeker's Allowance/Income Based Employment Support Allowance/Pension Credit?	1 Yes 2 No
8 Would you describe yourself as:	1 White 2 Black – African 3 Black – Caribbean 4 Black – other (please specify) 5 Indian 6 Pakistani 7 Bangladeshi 8 Chinese 9 Any other ethnic group (please describe)
9 How long did it take you to get here from home or work?	1 Less than 15 minutes 2 15 – 30 minutes 3 30 minutes to one hour 4 More than one hour

## APPENDIX 3

### Summary of suggestions for improving our Office Facilities

We received 14 suggestions for improving our office facilities and these were:

- 2 clients suggested we should have a television in the reception area
- 1 client suggested we need a sign to indicate where the toilets are
- 10 clients suggested some form of coffee/tea/drinks machine in the reception area

- 1 client suggested we need some client car parking facilities



### Summary of suggestions for improving our Service

We received 19 suggestions for ways to improve our service and these were:

- 9 clients suggested reducing client waiting times

- 5 clients suggested having more advice work staff
- 3 clients suggested being able to make appointments for first visits to the Bureau
- 2 clients suggested a better telephone advice service



## APPENDIX 4

### CLIENTS BY LOCAL AUTHORITY WARD

Stranton	9.5%
Burn Valley	7.5%
Owton Manor	7.5%
Rift House	7.3%
Foggy Furze	6.7%
Dyke House	6.5%
St Hildas	6.5%
Brus	6.3%
Grange	6.3%
Rossmere	6.1%
Throston	6.0%
Seaton	4.7%
Fens	4.4%
Hart	3.7%
Park	2.4%
Greatham	1.2%
Elwick	0.6%
Other	6.8%

Figures compiled in 2009/2010



# HARTLEPOOL CITIZENS ADVICE BUREAU



Report of the Results of the  
Client Feedback Survey  
February, March, April & May 2010

Designed and layout by Julie Malpass  
(Hartlepool CAB)

## **Introduction to Report**

---

This report summarises the results of a Client Feedback Questionnaire Survey carried out by the Hartlepool Citizens Advice Bureau in 2010. It is both a requirement of our membership of the National Association of Citizens Advice Bureaux and also of the Legal Services Commission that we take steps to obtain feedback and comments from clients on the service they receive from the Bureau. This has to be done at least annually.

### **Methodology**

The way in which the Bureau decided to seek the views and opinions of clients was as follows:

#### **For Paid Caseworkers**

During the three month period February, March and April 2010, when a client case was closed, they would be sent a standard Client Feedback Questionnaire to complete and also a freepost addressed envelope to encourage them to return the form to us.

#### **For the Telephone Advice Service**

During the month of April 2010, every client contacting the Bureau for advice via our Telephone Advice Service was sent a Client Feedback Questionnaire plus a freepost addressed envelope.

#### **For the Generalist Advice Service**

During the month of May 2010, every second client seeking generalist advice (normally one off advice) was sent a Client Feedback Questionnaire plus a freepost addressed envelope.

## Section 1

### Summary of all the 168 Client Feedback Questionnaires returned by clients

#### Question 1

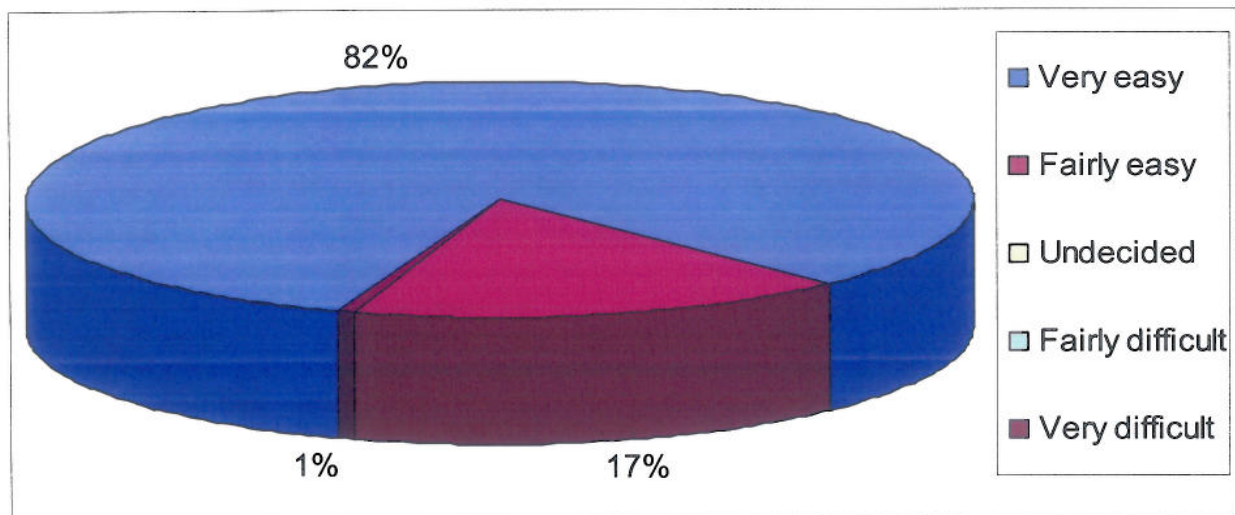
How satisfied were you with our overall level of service

Very satisfied	159	94.5%
Fairly satisfied	9	5.5%
Undecided	-	-
Fairly dissatisfied	-	-
Very dissatisfied	-	-

#### Question 2

Did we give you information/advice that was easy to understand?

Very easy	138	82%
Fairly easy	29	17%
Undecided	-	-
Fairly difficult	-	-
Very difficult	1	1%



## Section 2

**Summary of the 34 Client Feedback Questionnaires returned for the Money Advice Service (Caseworkers Angela Goodall, Janet Noble, Ann Brown, Jill Hutton & Jenny Conway Deputy Manager)**

### Question 1

How satisfied were you with our overall level of service

Very satisfied	33	97%
Fairly satisfied	1	3%
Undecided	-	-
Fairly dissatisfied	-	-
Very dissatisfied	-	-

### Question 2

Did we give you information/advice that was easy to understand?

Very easy	22	65%
Fairly easy	11	32%
Undecided	-	-
Fairly difficult	-	-
Very difficult	1	3%

### Question 3

How informative did you find our staff?

Very good	32	94%
Fairly good	2	6%
Undecided	-	-
Fairly poor	-	-
Very poor	-	-

### Question 4

How well did we keep you up-to-date with progress?

Very well	31	81%
Fairly well	2	6%
Undecided	1	-
Fairly poor	-	-
Very poor	-	-
Not applicable – one off advice given	-	3%



Selection of comments made by clients of  
The Money Advice Service

---

- I found Miss Angie Goodall very understanding and helpful. A credit to the CAB.
- I can not fault your service, I would say to anyone go and see the CAB for help. Your service is excellent. Thank You
- I found Janet Noble very helpful and courteous.
- All the staff were very helpful and nothing was too much trouble. Excellent Service.



- Ann advised and helped me with a fairness and without judgement enabling me to begin to clear my debts and cope with repayments.
- Very understanding, helpful and reassuring.
- Jill was very helpful and got me out of trouble. I would certainly recommend you.
- Very helpful and understanding



Selection of comments made by clients of the  
Welfare Rights Service:

---

- Mr Tony Wright was excellent. Very very helpful and a pleasure to be with. Thank You for your kind help.



- The help and advice that you give is first class.
- I think everything you do is excellent and done very efficiently. Thank you for all your kindness and help



- Very helpful at all times.
- Claire Harrington was very helpful and understanding
- All staff were very cheerful and very helpful.
- You get to the problem and sort it out.
- You are a very good service and do a good job for the people.



### Question 5

How well did we listen to what you had to say?

Very well	18	100%
Fairly well	-	-
Undecided	-	-
Fairly poor	-	-
Very poor	-	-

### Question 6

Did we treat you fairly at all times?

Yes	18	100%
No	-	-
Don't know	-	-

### Question 7

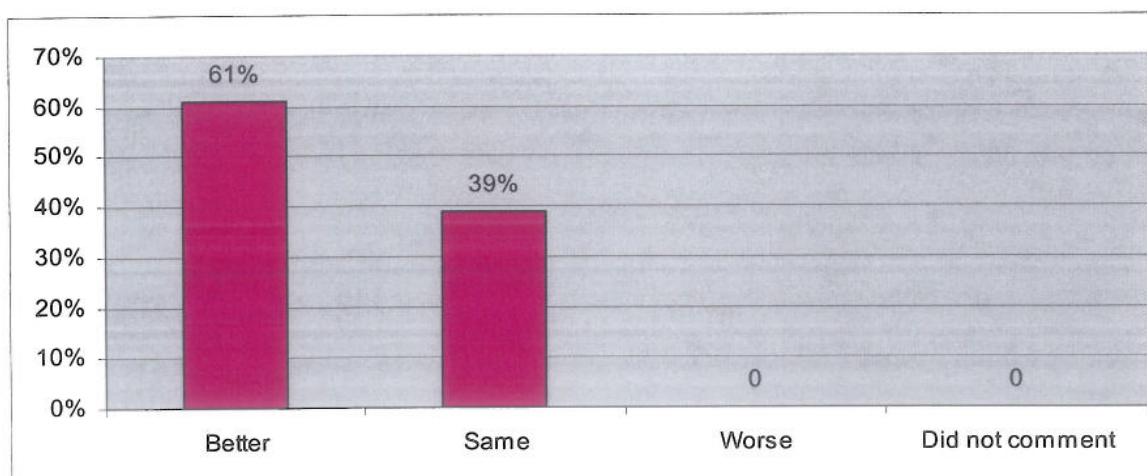
Would you recommend us to someone else if they need legal help or advice?

Certain to	18	100%
Likely to	-	-
Undecided	-	-
Unlikely to	-	-
Certain not to	-	-

### Question 8

Was the result of your case better, worse or the same after we had advised you?

Better	11	61%
Same	7	39%
Worse	-	-
Did not comment	-	-



Selection of comments made by clients of the  
Employment Law Service:

---

- I received a great all round helpful, friendly and understanding service from Simon Buckle.



- You pointed me in the right direction, without your help I would have been in the dark.
- Very helpful and supportive.



- You provided solid and accurate advice for my situation of an Employment Tribunal.
- Very helpful and informed me of all action that I could take.
- I am very pleased with everyone especially Joe Michna. Thank You
- I would like to say a Big Thank You
- Very accommodating, easy to talk to and understanding. Great communication and contact. Thanks for everything.
- I think you do a good job and would recommend you to someone else.
- Excellent support and help. Highly recommended to others





## Section 5

### Summary of the 3 Client Feedback Questionnaires which were returned for the Representational Advocacy Service (Caseworker Dave Halcrow)

#### Question 1

Did you find the staff who referred you to the Advocacy Worker helpful?

Yes	3	100%
No	-	-

#### Question 2

How long did you wait before you were contacted by the Advocacy worker?

Less than 10 days	3	100%
More than 10 days	-	-

#### Question 3

Was the Advocacy worker able to assist you?

Yes	3	100%
No	-	-

#### Question 4

Were you satisfied with the service of the Advocacy Worker?

Yes	3	100%
No	-	-

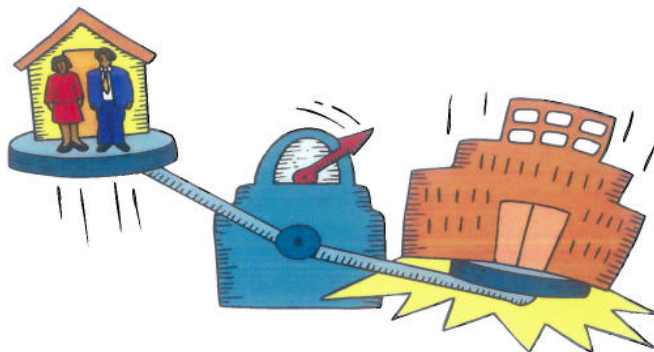
Selection of comments made by clients of the  
Representational Advocacy Service:

---

- Dave gave me advice and supported me. Very Helpful.
- I had a really difficult time coming to terms with putting my mother in a home. Your help got me through, I wasn't pressured into anything, just advised.



- Very Good I have recommended to other carers.
- My complaint and disability were dealt with to a very high standard. Well Done.
- Very good and helpful.



## Section 6

### Summary of the 26 Client Feedback Questionnaires which were returned for the Telephone Advice Service (Caseworker Lynda Monaghan)

#### Question 1

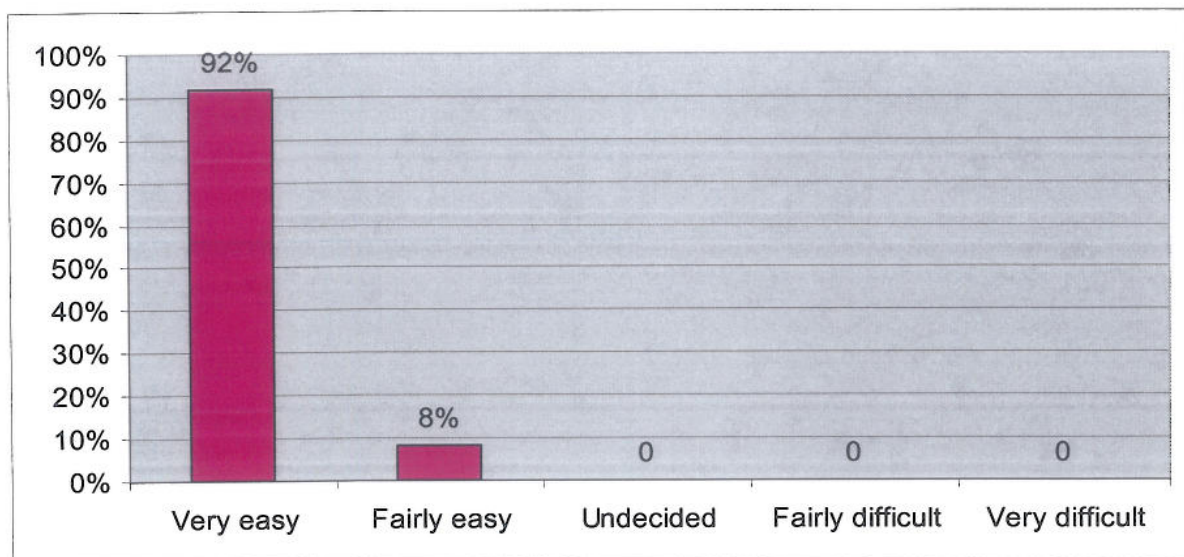
How satisfied were you with our overall level of service and information?

Very satisfied	25	96%
Fairly satisfied	1	4%
Undecided	-	-
Fairly dissatisfied	-	-
Very dissatisfied	-	-

#### Question 2

Did we give you information/advice that was easy to understand?

Very easy	24	92%
Fairly easy	2	8%
Undecided	-	-
Fairly difficult	-	-
Very difficult	-	-



### Question 3

How well did we listen to what you had to say?

Very well	26	100%
Fairly well	-	-
Undecided	-	-
Fairly poor	-	-
Very poor	-	-

### Question 4

Did we treat you fairly at all times?

Yes	26	100%
No	-	-
Don't know	-	-

### Question 5

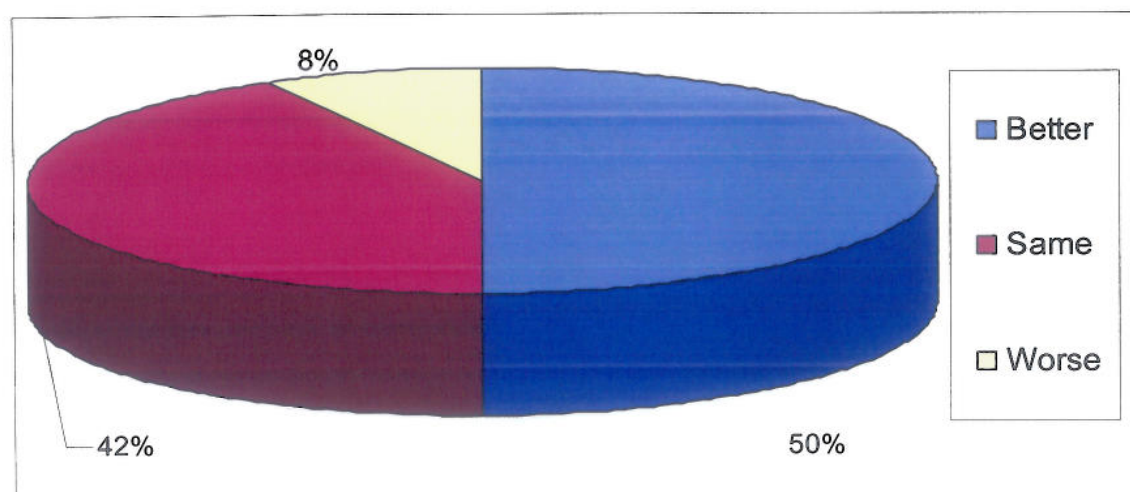
Would you recommend us to someone else if they need legal help or advice?

Certain to	22	85%
Likely to	4	15%
Undecided	-	-
Unlikely to	-	-
Certain not to	-	-

### Question 6

Was the result of your case better, worse or the same after we had advised you?

Better	13	50%
Same	11	42%
Worse	2	8%



Selection of comments made by clients of  
The Telephone Advice Service:

---

- I found your service very helpful and sent me in the right direction.
- I was very pleased with the service, and Lynda who took the time to find more information and phone me.



- Very helpful and pleasant manner.
- Good advice was given by Lynda, she was a friendly lady and was very helpful. Thank you for all your help and advice.
- I found you very helpful so I would advise friends to seek similar advice if needed.
- The lady was very helpful and very attentive.
- Always been satisfied with the service provided.
- 





## Section 7

### Summary of the 15 Client Feedback Questionnaires returned for the Housing Advice Service (Caseworkers Angie Brough, and Beverly Goodwin).

#### Question 1

How satisfied were you with our overall level of service?

Very satisfied	15	100%
Fairly satisfied	-	-
Undecided	-	-
Fairly dissatisfied	-	-
Very dissatisfied	-	-

#### Question 2

Did we give you information/advice that was easy to understand?

Very easy	12	80%
Fairly easy	3	20%
Undecided	-	-
Fairly difficult	-	-
Very difficult	-	-

#### Question 3

How informative did you find our staff?

Very good	13	86.5%
Fairly good	2	13.5%
Undecided	-	-
Fairly poor	-	-
Very poor	-	-

#### Question 4

How well did we keep you up-to-date with progress?

Very well	14	93.5%
Fairly well	1	6.5%
Undecided	-	-
Fairly poor	-	-
Very poor	-	-
Not applicable – one off advice given	-	-

#### Question 5

How well did we listen to what you had to say?

Very well	14	93.5%
Fairly well	1	6.5%
Undecided	-	-
Fairly poor	-	-
Very poor	-	-

#### Question 6

Did we treat you fairly at all times?

Yes	15	100%
No	-	-
Don't know	-	-

#### Question 7

Would you recommend us to someone else if they need legal help or advice?

Certain to	14	93.5%
Likely to	1	6.5%
Undecided	-	-
Unlikely to	-	-
Certain not to	-	-

#### Question 8a

Could you have moved without the Scheme's help?

Yes	-	-
No	15	100%

#### Question 8b

Was the result of your case better, worse or the same after we had advised you (5 responded)?

Better	4	80%
Same	1	20%

Selection of comments made by clients of  
The Housing Advice Service:

---

- I was very happy with all the help and information I received from CAB. Angie Brough was fantastic. Thanks.
- I think you are doing a great job without the help from you I would not be where I am now, its changed my life and improved my children's life. Thank You.
- The service was very good and applied me and my partner with accommodation very quick.
- Your help was spot on to me when I was having a bad time. Thank You
- All I can say about CAB is that you helped us when we needed some help to move house and start again in another part of town. Thanks to Beverley Goodwin
- The Bureau was very helpful and was ready to tackle any problem I had.
- Very helpful.





## Section 8

### Summary of the 56 Client Feedback Questionnaires returned for the Generalist Advice Service (Volunteers and Paid Staff)

#### Question 1

How satisfied were you with our overall level of advice and information?

Very satisfied	50	89%
Fairly satisfied	6	11%
Undecided	-	-
Fairly dissatisfied	-	-
Very dissatisfied	-	-

#### Question 2

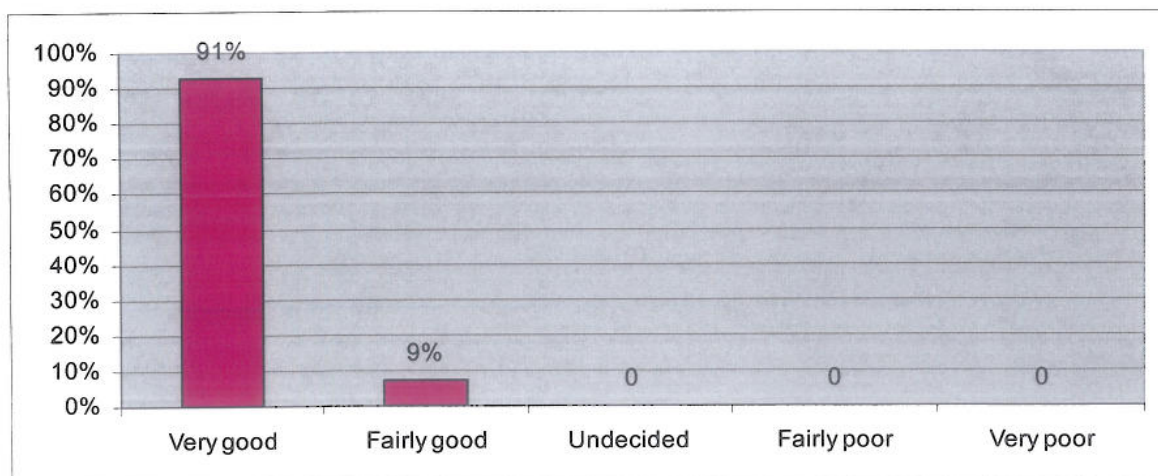
Did we give you information/advice that was easy to understand?

Very easy	46	82%
Fairly easy	10	18%
Undecided	-	-
Fairly difficult	-	-
Very difficult	-	-

#### Question 3

How informative did you find our staff?

Very good	51	91%
Fairly good	5	9%
Undecided	-	-
Fairly poor	-	-
Very poor	-	-



#### Question 4

How well did we listen to what you had to say?

Very well	50	89%
Fairly well	6	11%
Undecided	-	-
Fairly poor	-	-
Very poor	-	-

#### Question 5

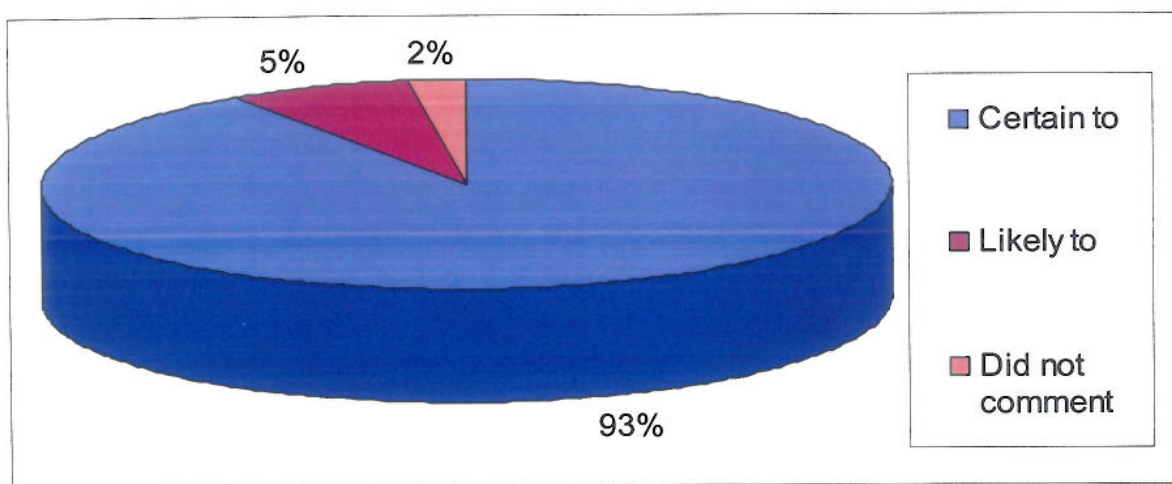
Did we treat you fairly at all times?

Yes	55	98%
No	-	-
Don't know	-	-
Did not comment	1	2%

#### Question 6

Would you recommend us to someone else if they need legal help or advice?

Certain to	52	93%
Likely to	3	5%
Undecided	-	-
Unlikely to	-	-
Certain not to	-	-
Did not comment	1	2%



#### Question 7

Was the result of your case better, worse or the same after we had advised you (48 people responded)?

Better	32	67%
Same	16	33%
Worse	-	-

## Selection of comments made of the Generalist Advice Service

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- I found that the service provided was of satisfying nature. I was presented with additional information which helped my case.
- I was very satisfied with the help and advise I received.
- The service I received could not have been any better.
- The lady we dealt with was very good.
- We felt much better when we got good advice, what our options were. Excellent.
- Very helpful staff.



- Your service was spot on I just disagree with the law in my case, it lets people play God sat in the office and that's playing with peoples lives (wrong).
- The help I received was really helpful and I Thank You.
- I was very satisfied with the advice you gave me.
- The personnel in reception and at the interview could not have been more pleasant and helpful. This is the second time I have had help from you and I have been very well advised and assisted in every way.



## Section 9

**This section of the report provides details of the responses received to 'Community Awareness' of the Bureau and the services we provide and, also the replies received to whether it was easy or difficult to contact the Bureau.**

The question on the Client Feedback Questionnaire was:

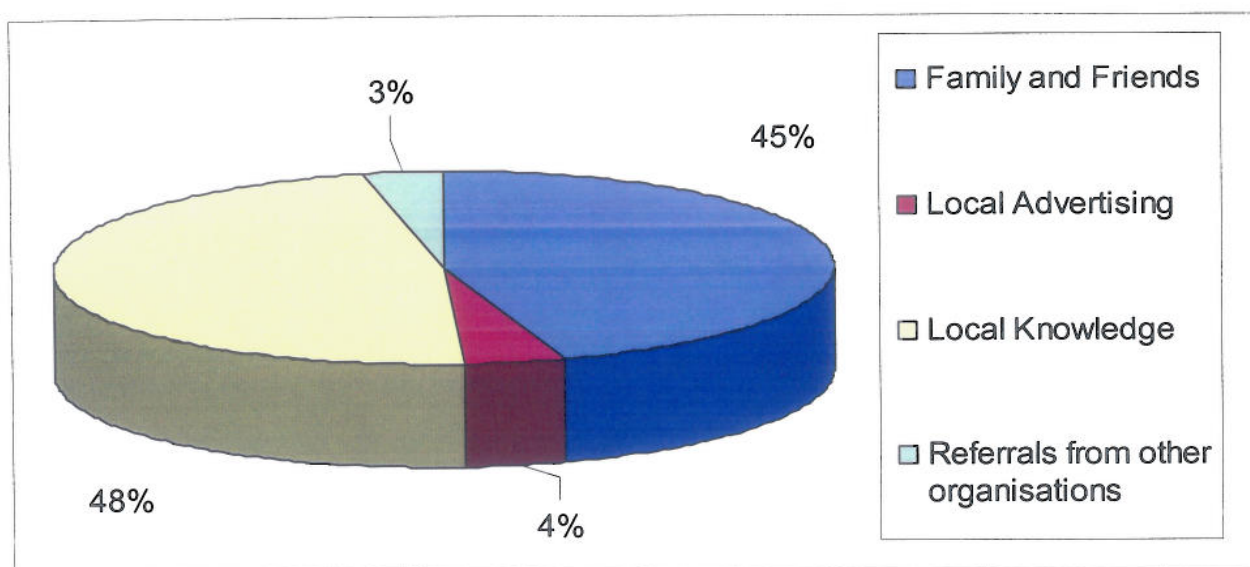
**Please tell us how you heard about our organisation and whether it was easy or difficult to make initial contact.**

The responses to the first part of this question can be broken down into four categories, which are:

Family & Friends (word of mouth)  
Through Local Advertising (Hartlepool Mail etc)  
Local Knowledge  
Referrals from other Organisations

We had 118 clients responding to this question and the breakdown of these were as follows:

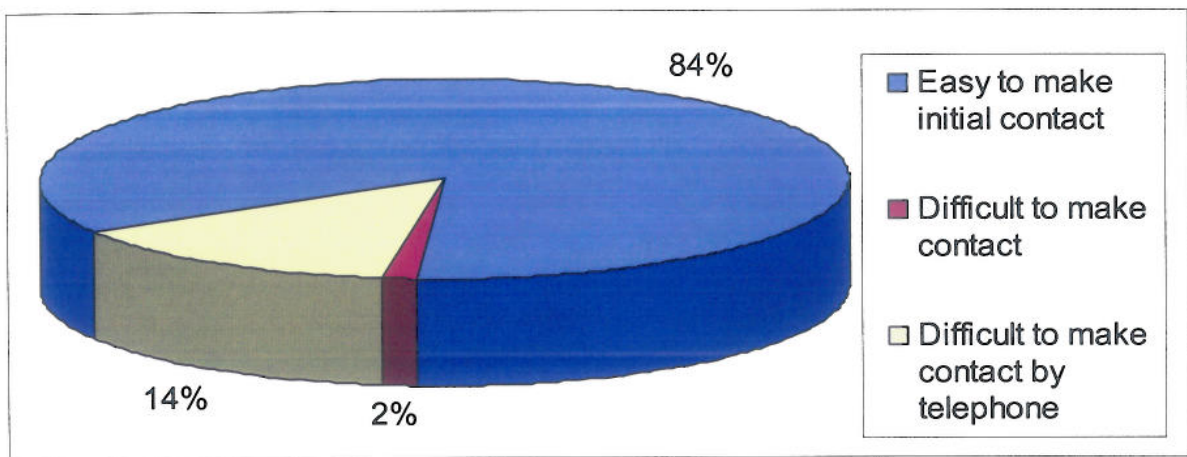
Family and Friends	53	45%
Local Advertising	5	4%
Local Knowledge	56	48%
Referrals from other organisations	4	3%





The second part of the question, which asked '**whether it was easy or difficult to make initial contact with the Bureau**', we had 64 people responding to this part of the question with the following results:

Easy to make initial contact	54	84%
Difficult to make contact	1	2%
Difficult to make contact by telephone	9	14%



Taken as a percentage of all the people who replied to the survey, only 14 % of clients indicated that they had difficulty in making initial contact by phone when contacting the Bureau.

## Section 10

### Analysis of Questionnaire Returns

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The overall results from the Client Feedback Survey are good and this is consistent with the previous surveys we have carried out. The total number of clients indicating that they were either very satisfied or fairly satisfied with the level of service they received from the Bureau is 100% with some services, and 89% with the Generalist Advice Service.

Given the wide range of issues that the Bureau deals with and also the diverse mix of clients that we provide advice and assistance to, such as the young, the elderly, those in debt, the homeless, those with learning difficulties and also those with mental health problems, it was also reassuring that 97.5% of clients felt that we had treated them fairly.

That 98% of those responding to the survey had sufficient confidence in our service to either be certain to, or likely to recommend us to someone else if they needed legal help, is also a good measure of the overall quality of the service we provide and the confidence that they have in our service. The confidence can also be measured by the number of clients who have been advised to contact us through 'word of mouth', that is when friends, family members and others suggest that they contact us. A third of clients responding to this question said it was through 'word of mouth' that they decided to contact us.

That the Bureau has a high profile within the local community can be evidenced from the 52% of clients who stated that they contacted us either through their own local knowledge or because of our local advertising.

Perhaps the most encouraging part of the survey is that related to how easy or otherwise it was for clients to contact the Bureau. Of those 64 clients responding to this question on the survey form, 84% stated that it was 'easy to make contact' with the Bureau. Only 2% of those people responding to this question said it was 'difficult to make contact' generally with the Bureau and 14% of our clients refer to our Telephone Advice Service. As a percentage of all of those people, who replied to the survey, only 16% said they had difficulty contacting the Bureau as a whole.

Whilst the results of this survey are very encouraging, the Hartlepool Citizens Advice Bureau will not become complacent about the service we provide and how this is provided.



# HARTLEPOOL CITIZENS ADVICE BUREAU

## Client Feedback Questionnaire

Hartlepool  
Citizens  
Advice  
Bureau

*As part of our commitment to improving the service we provide, we send our clients this feedback questionnaire. We would be grateful if you could help us by completing this form and returning it in the enclosed envelope (you do not need a stamp). Please be assured that the survey is completely confidential and unless you complete your details at the end, we will not know who has taken part.*

You may recall that ..... dealt with your enquiry/case. Date issued .../.../10

Q1 How satisfied were you with our overall level of service?

**PLEASE TICK ONE BOX**

- |   |  |
|---|--|
| <input type="checkbox"/> Very satisfied   | <input type="checkbox"/> Fairly dissatisfied |
| <input type="checkbox"/> Fairly satisfied | <input type="checkbox"/> Very dissatisfied   |
| <input type="checkbox"/> Undecided        |  |

Q1a If dissatisfied, please tell us briefly why this is.

---

Q2 Did we give you information/advice that was easy to understand?

**PLEASE TICK ONE BOX**

- |                                      |   |
|--------------------------------------|---|
| <input type="checkbox"/> Very easy   | <input type="checkbox"/> Fairly difficult |
| <input type="checkbox"/> Fairly easy | <input type="checkbox"/> Very difficult   |
| <input type="checkbox"/> Undecided   |   |

Q2a How might we improve?

---

Q3 How informative did you find our staff?

**PLEASE TICK ONE BOX**

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> Very good   | <input type="checkbox"/> Fairly poor |
| <input type="checkbox"/> Fairly good | <input type="checkbox"/> Very poor   |
| <input type="checkbox"/> Undecided   |                                      |

Q4 How well did we keep you up-to-date with progress?

**PLEASE TICK ONE BOX**

- |                                      |  |
|--------------------------------------|--|
| <input type="checkbox"/> Very well   | <input type="checkbox"/> Fairly poor                           |
| <input type="checkbox"/> Fairly well | <input type="checkbox"/> Very poor                             |
| <input type="checkbox"/> Undecided   | <input type="checkbox"/> Not Applicable – one off advice given |

Q5 How well did we listen to what you had to say?

**PLEASE TICK ONE BOX**

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> Very well   | <input type="checkbox"/> Fairly poor |
| <input type="checkbox"/> Fairly well | <input type="checkbox"/> Very poor   |
| <input type="checkbox"/> Undecided   |                                      |

# HARTLEPOOL CITIZENS ADVICE BUREAU

## Client Feedback Questionnaire

Hartlepool  
Citizens  
Advice  
Bureau

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You may recall that ..... dealt with your enquiry/case. Date issued

Q1 How satisfied were you with our overall level of service?

**PLEASE TICK ONE BOX**

- ☐ Very satisfied
- ☐ Fairly satisfied
- ☐ Undecided

- ☐ Fairly dissatisfied
- ☐ Very dissatisfied

Q1a If dissatisfied, please tell us briefly why this is.

---

Q2 Did we give you information/advice that was easy to understand?

**PLEASE TICK ONE BOX**

- ☐ Very easy
- ☐ Fairly easy
- ☐ Undecided

- ☐ Fairly difficult
- ☐ Very difficult

Q2a How might we improve?

.....

Q3 How informative did you find our staff?

**PLEASE TICK ONE BOX**

- ☐ Very good
- ☐ Fairly good
- ☐ Undecided

- ☐ Fairly poor
- ☐ Very poor

Q4 How well did we keep you up-to-date with progress?

**PLEASE TICK ONE BOX**

- ☐ Very well
- ☐ Fairly well
- ☐ Undecided

- ☐ Fairly poor
- ☐ Very poor
- ☐ Not Applicable – one off advice given

Q5 How well did we listen to what you had to say?

**PLEASE TICK ONE BOX**

- ☐ Very well
- ☐ Fairly well
- ☐ Undecided

- ☐ Fairly poor
- ☐ Very poor

# HARTLEPOOL CITIZENS ADVICE BUREAU

## Client Feedback Questionnaire

### Generalist Advice Service

Hartlepool  
Citizens  
Advice  
Bureau

*As part of our commitment to improving the service we provide, we send our clients this feedback questionnaire. We would be grateful if you could help us by completing this form and returning it in the enclosed envelope (you do not need a stamp). Please be assured that the survey is completely confidential and unless you complete your details at the end, we will not know who has taken part.*

Date issued . . . 2010

Q1 How satisfied were you with our overall level of service?

**PLEASE TICK ONE BOX**

- |   |  |
|---|--|
| <input type="checkbox"/> Very satisfied   | <input type="checkbox"/> Fairly dissatisfied |
| <input type="checkbox"/> Fairly satisfied | <input type="checkbox"/> Very dissatisfied   |
| <input type="checkbox"/> Undecided        |  |

Q1a If dissatisfied, please tell us briefly why this is.

---

Q2 Did we give you information/advice that was easy to understand?

**PLEASE TICK ONE BOX**

- |                                      |   |
|--------------------------------------|---|
| <input type="checkbox"/> Very easy   | <input type="checkbox"/> Fairly difficult |
| <input type="checkbox"/> Fairly easy | <input type="checkbox"/> Very difficult   |
| <input type="checkbox"/> Undecided   |   |

Q2a How might we improve?

.....

Q3 How informative did you find our staff?

**PLEASE TICK ONE BOX**

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> Very good   | <input type="checkbox"/> Fairly poor |
| <input type="checkbox"/> Fairly good | <input type="checkbox"/> Very poor   |
| <input type="checkbox"/> Undecided   |                                      |

Q4 How well did we listen to what you had to say?

**PLEASE TICK ONE BOX**

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> Very well   | <input type="checkbox"/> Fairly poor |
| <input type="checkbox"/> Fairly well | <input type="checkbox"/> Very poor   |
| <input type="checkbox"/> Undecided   |                                      |



HARTLEPOOL CITIZENS ADVICE BUREAU  
REPRESENTATIONAL ADVOCACY SERVICE  
CLIENT SATISFACTION SURVEY



INTRODUCTION

Hartlepool Citizens Advice Bureau would value your view on your experience of the above Advocacy Service in order to monitor the service and make any necessary improvements. Please take a minute of your time to complete this client satisfaction survey. The information will be totally **confidential**. (Please tick the appropriate box as necessary).

1. How did you find out about the Representational Advocacy Service.....  
.....
2. Did you find the staff who referred you to the Advocacy Worker helpful?  
Yes ☐ No ☐ Please specify.....  
.....
3. How long did you wait before you were contacted by the Advocacy worker?  
Less than 10 days ☐ More than 10 days ☐
4. Was the Advocacy worker able to assist you? Yes ☐ No ☐
5. Were you satisfied with the service of the Advocacy Worker?  
Yes ☐ No ☐ Please specify.....  
.....
6. Are there any changes you would like to suggest to improve the service.....  
.....  
.....
7. What comments, complaint or compliments would you like to make about the Advocacy Service? .....  
.....  
.....
8. If you would like us to contact you with regard to any of your comments please write your name and address below (only if you wish us to do so).  
  
Name: .....  
Address: .....  
.....  
..... Tel No: .....

Please complete and return to the Citizens Advice Bureau in the freepost envelope provided. Thank you for spending time to complete this Client Satisfaction Survey.

**Information From Hartlepool CAB**

1. our only funding for Debt Advice currently is from the Government's Financial Inclusion Fund (2 FTE Debt Caseworkers)
2. this funding currently ends on the 31st March 2011 although Citizens Advice are lobbying Government strongly to get the funding to continue
3. no decision has yet been made by Government and locally we shall have to stop taking on new Debt Cases from around mid February as there will be a need for the existing caseworkers to wind-down and close all of their existing client files before the 31st March 2011
4. should no further FIF funding be available we would be left without any specialist Debt Advice service
5. although we are making efforts to obtain funding for Debt Advice from other sources, we have nothing guaranteed at this moment in time.