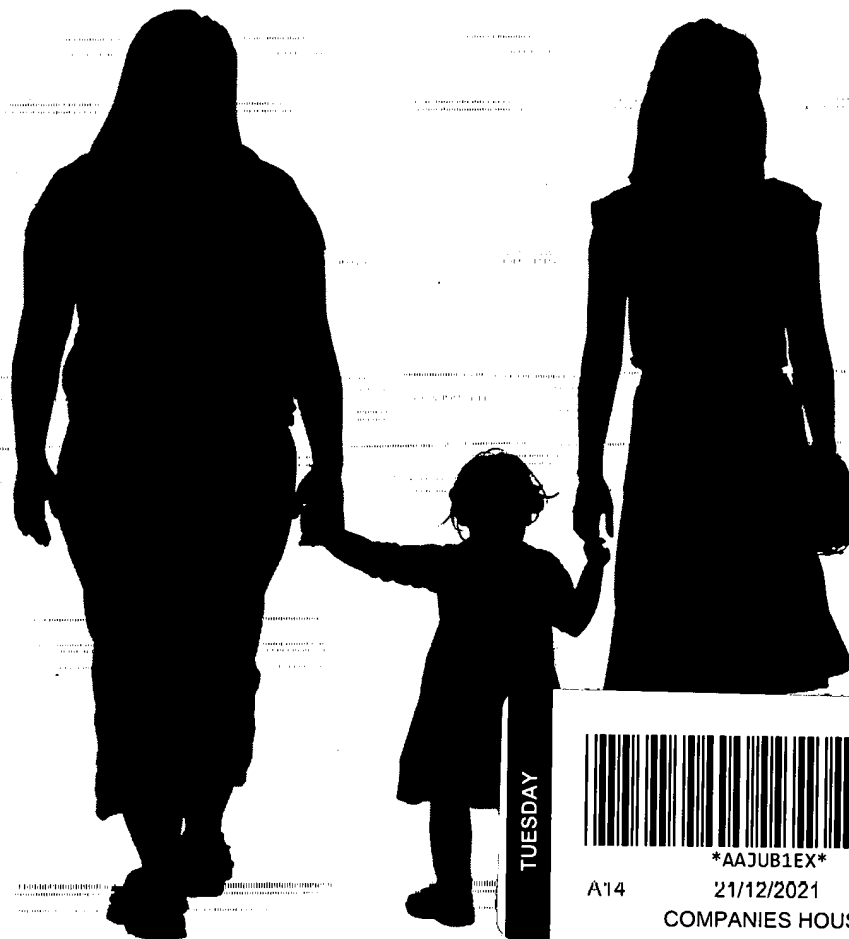


**citizens
advice**

Waverley

Annual Report and Accounts



2020-21

REGISTERED COMPANY NUMBER: 04823693 (England and Wales)

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Chair's Introduction

Our work during 2020/21 has focused on addressing the unprecedented challenges that individuals and communities have faced during the Covid pandemic, whether financial, housing, benefits-related or domestic abuse. We have needed to work very differently this year. Our doors may have been closed, but our focus remained firmly on continuing to serve our community and provide the advice that was needed more than ever before.

I would like to thank all of our funders, staff, volunteers and friends for their invaluable support during the year. Without them we would not have been able to support the thousands of people who came to us for help, many of them seeking advice from us for the first time.

I am very pleased to report that our Domestic Abuse team, under the guidance of their CEO Cath Jago, has won the prestigious Citizens Advice national award for Team of the Year. Congratulations to the whole team who continued to provide support to those in need during an extremely difficult period. We were very fortunate that the Ministry of Justice also provided much needed extra funding which enabled us to expand the team to meet the increasing demand for survivors of domestic abuse.

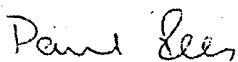
In another major step forward the Advice Service joined the national Citizens Advice telephone service (Adviceline) which significantly enhanced the call answer rate for our clients. The team also continued to provide help to nearly 1,000 people with their initial Universal Credit claims

We continue to look for multi-channel ways in which we can both develop the service and reduce costs. This includes enhancing the way we work in the community, responding seamlessly to the demand for digital services from our clients and matching office space more appropriately to the demand for a face to face service.

We are enthusiastic about the opportunity to create synergies by partnering with other local advice and information providers, including other Citizens Advice organisations. We are fortunate that Lynn Hannah joined us this year as Interim CEO for the Advice Service to help us develop our service to better serve our community.

Funding remains critical to our ability to support Waverley residents. The Advice Service funding from Waverley Borough Council was extended by one year to 31 March 2022. WBC are in the process of commissioning a range of services including the Information, Advice and Guidance support in the Borough. At this stage our future funding and therefore the level of service we will be able to provide from 1 April 2022 is unclear. We anticipate that this will be clarified early in the New Year.

We have all seen so much change this year and we expect that this will continue. But our goal to provide free, impartial and independent advice to anyone who needs it, will always remain.



PAUL REES

One Charity, Two Services

Citizens Advice Waverley consists of two separately managed services, our core Advice Service and the South West Surrey Domestic Abuse outreach service (SWSDAOS). Each of these services has its own management, separate funding and dedicated team of specialist staff delivering its client-facing services.

Bringing these two services together within one organisation has enabled us to build on the close working links and to ensure that clients of each service have ready access in one place to the specialist support they need across a range of different issues, without having to re-engage with different organisations.

Sharing a common “back-office”, including people and financial management, IT support and some other administrative functions, also enables cost efficiencies for both services.

Both services are overseen by a single Trustee Board.

Pages 6 to 20 of this report focus on the work of our Advice Service, with pages 21 to 36 outlining the work of SWSDAOS.

“ Citizens Advice Waverley has been an absolute life-saver! I can’t thank you enough. Several times in my life I’ve been overwhelmed and out of my depth. Citizens Advice is like a supportive parent, calmly helping resolve my dilemma. Thank you, thank you. ”

Client quote

Our Organisation

Citizens Advice Waverley is a local charity and company limited by guarantee providing a free, independent and non-judgemental information and advice service to people in Waverley borough and beyond, and support to people living in Guildford and Waverley boroughs affected by domestic abuse.

What we do and who we work with.

Our **Advice Service** offers free confidential advice on a wide range of issues, online, over the phone or in person. We work with other voluntary organisations, locally and nationally, to provide people with the information, support and practical help they need to find a way through their problems.

As a member of Citizens Advice (the operating name of the National Association of Citizens Advice Bureaux), we receive a range of support, including specialist information services, and research to use in our campaigning work. Citizens Advice also provides a range of infrastructure services to support the running of our business.

Waverley Borough Council extended our Service level agreement until 31st March 2022 and will commission continuing information, advice and guidance services thereafter. The result of this will be known by end 2021.

Our **Domestic Abuse Service** is also a member of the Surrey Domestic Abuse Partnership (SDAP) - a group of four independent charities working together across the whole of Surrey to ensure that survivors of domestic abuse are safe, and to build a future where domestic abuse is not tolerated. Working with partner agencies we support the delivery of the Surrey Against Domestic Abuse Strategy to:

- provide specialist domestic abuse outreach support within local communities empowering survivors to achieve independence, safe and free from harm caused by perpetrator behaviour.
- provide tailored specialist support for children and young people as well as adult survivors.
- work with affected non-abusive family members as part of a joined-up pathway delivering support at the right time in the right place.

Our Governance and Management

Our Trustee Board sets our vision and strategic direction. The Trustee Board meets at least four times each year. It delegates some of its responsibilities to committees, each of which has their own published terms of reference and membership. Each committee includes at least one Trustee who reports to the full Board. Each of our two services has its own Chief Executive, who works with their own management team, and is responsible for delivering the Trustee Board's vision and for the day-to-day operation of their service.

Citizens Advice provides detailed guidance to help develop and monitor our organisation. Each year we use Citizens Advice's process to benchmark our organisation against an agreed set of quality standards. The Board uses the outcomes of this and the related 3-yearly independent audits to ensure we are operating effectively and that any areas for improvement are addressed.

Our Organisation (continued)

Risk and Internal Controls

Our trustees are responsible for the effective management of risk and for making sure that internal controls are in place and operating as designed. They have reviewed their procedures in the light of corporate governance guidance contained in the Statement of Recommended Practice "Accounting and Reporting for Charities". A risk assessment report is contained in the business plan and anticipates potential changes to the environment in which we work and how these would impact on our services. In addition they maintain and regularly review a risk register which identifies key risks, including funding.

Election of Trustees

We recruit trustees through an open, competitive process, using local media and our own network to find people with suitable skills and experience to provide good leadership and make sound decisions. New trustees are provided with an Induction and have meetings with other trustees and relevant members of the Management Team. This provides an opportunity to learn more about the organisation's work, focus on current Board priorities and to assess any individual training needs.

Legal and administrative details

Citizens Advice Waverley is a company limited by guarantee. We are also a charity registered with the Charity Commission and authorised by the Financial Conduct Authority. We are governed by Directors, who are also the Charity Trustees for the purposes

of Charity law. Trustees confirm that they have complied with the duty in Section 4 of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Funding

Our **Advice Service** relies heavily on our local authorities for funding so maintaining good relations and increasingly agreeing multi-year funding arrangements help to mitigate this risk. We have also widened our sources of income by providing other related services and ensuring we maintain an appropriate level of reserves.

Our **Domestic Abuse Service** is separately funded by Surrey County Council, Surrey Policy and the Office of the Police and Crime Commissioner for Surrey via a contract with the Surrey Domestic Abuse Partnership of which SWSDAOS is a member.



Our current Board of Trustees (2021-22)



**HR
Committee**

**Finance,
Operations
and Risk
Committee**

**Income
Generation
Committee**

**Research &
Campaigns
Committee**

**Comms
Committee**

Paul Rees—Chairman. Trustee since 2012

Paul is a retired PwC partner where he worked for 30 years in the UK and abroad. He has had a range of roles in the voluntary sector including being on the board of a care home group and a large housing association and is currently a Trustee with a supported housing charity in Surrey.

Jonathan Pepper—Treasurer (Chair FORC). Trustee since 2016

Jonathan has over 30 years experience of financial planning and analysis in retail and transport organisations and is also a trustee of an Arts sector social enterprise.

Jane Moore—Company Secretary. Trustee since 2015

Jane is a freelance solicitor having previously worked in a senior in-house legal position in a major publishing company. She is also a Certified Information Privacy Professional with a qualification in EU data protection.

Jane Armstrong—Chair Income Generation. Trustee since 2019

Jane has had a career in financial services of over 35 years. She retired in 2019 and is a non executive board director of a UK asset management team, a governor at Ardingly School in Sussex and a pension fund trustee.

Nigel Jewkes—Chair Communication Committee. Trustee since 2017

Nigel recently retired after 20 years in BOC Gases (Linde Group) and brings significant experience in strategy, planning and market development gained working in Asia, USA and Europe

Janet Edwards—Chair Human Resources. Trustee since 2020

Janet recently retired after 35 years experience in the pharmaceutical industry leading clinical research and the development of new medicines. Janet has worked globally and is expert in operational delivery and change management. She is also a Chartered member of CIPD.

Sue Briggs—SWSDA and Safeguarding. Trustee since 2020

Sue has significant experience in support for survivors of domestic abuse as well as other client focused activities in the voluntary sector. Sue also represents CAW/SWSDA on the board of the Surrey Domestic Abuse Partnership (SDAP).

Our Advice Service



**Whoever you are,
whatever the problem...**

Our Advice Service

Chief Executive's Overview

The Covid 19 pandemic dominated and shaped our work this year. It not only had a profound affect on the lives of many local people but also changed the way in which we delivered our services to them.

I was welcomed into Citizens Advice Waverley in April 2021 to pick up the reins from Phil Davies who retired after 14 years. Along with the staff and volunteers, I would like to thank Phil for the amount of hard work he committed to the community and the services at the bureau. We wish him the very best the future.

In line with government advice from Thursday 26 March 2020 we closed all our offices to the public and moved to a home-based service.

Within less than two weeks we had a team of 60 people working from home, delivering phone and online advice.

We also worked with key partners such as local authorities and foodbanks to ensure that these crucial services continued to operate effectively, as well as working with local community voluntary groups

More than half of the enquires we received during that period were directly related to issues arising from the Covid pandemic.

As we were conscious that the most vulnerable in the community rely heavily on our services, and that many regularly visit our offices for help, as

soon as the lockdown restrictions were eased we reopened our offices to the public, using video technology to provide a Covid safe service.

The service has worked relentlessly to provide the best possible advice services. I am extremely grateful for the commitment, perseverance and flexibility of staff and volunteers during this challenging period. They have enabled us to continue to champion the rights of people in Waverley.

Looking ahead we will be challenged with the new funding climate and commissioning for services, changes to the benefit system and the threat of housing eviction impacting on our clients.

We will be looking at innovative ways of improving access to our services to serve more people, exploring fundraising opportunities, recruiting more volunteers and involving more people to support services.

Finally, I would like to say thank you to our Trustees and Paul Rees, our Chair, for helping me to find my feet as the new interim CEO.

Lynn Hannah

Our Advice Service

About us

Citizens Advice Waverley provides high quality, impartial, independent and confidential advice free of charge to all the people of Waverley. We offer general advice on welfare benefits, money/debt, housing, employment, consumer rights, immigration, family and personal matters.

Our work in Waverley continues to significantly help some of the most vulnerable people in the borough. We provide accessible services and respond to each individual's needs and circumstances, with services spread throughout the borough, working through our four main advice centres. We recognise that we are unlikely to be able to meet all demand for our clients, and so where possible we seek to work in partnership with other organisations, professionals and community groups to deliver our services.

We emphasise the importance of early intervention and prevention, seeking to understand and act on the underlying causes of demand for our services by tackling preventable systemic failure.

What we do

- We help people to overcome their problems through advice, education and support.
- We campaign on the big issues that affect people's lives

How we do it

- We provide everyone with free and easy access to independent, confidential and impartial advice and support
- We value diversity, challenge discrimination and champion equality

Our impact

- For every £1 invested in our services we financially benefit clients by over £20 and save public funds of at least £25
- We reduce public expenditure on homelessness, legal action, unemployment and better mental and physical health
- We use volunteering to bring the community together, improve the lives of our volunteers, their communities and the people they help.



Our Advice Service

Year at a Glance

The people our Advice Service helped



6,264* people helped by us in person, by telephone, email or webchat

*This figure does not include people who have obtained advice directly from our own website or Citizens Advice's national website.

How our Advice Service helped people**



12%

In person



47%

Telephone
Adviceline /



41%

Other
Email / Webchat /

**Based on first contact method.

Our Advice Service's workload



13,231

Issues handled



14,328

Client, third party
& casework contacts



2,143,814

Financial outcome

What people came to our Advice Service about***



40%

Benefits



8%

Debt



10%

Housing



6%

Relationship/
Family &
Employment

*** The remaining 36% of people came to us about other issues.

The resources of our Advice Service



114+

Volunteers
providing around
60,000 hours
of support



4

local offices

1

outreach



9,300

Visitors to our
website.

Our Advice Service

Key Achievements in 2020/21

Supporting local people

Despite the limitations placed on our services by the Covid 19 crisis, during 2020/21 our core advice service supported 6,264 people with information and advice on well over 18,000 different issues, helping raise over £2 million of entitlements for our clients.

Maintaining our services during the Covid 19 crisis

In previous years more than half of our clients have used our office based face-to-face services. The introduction of the "lockdown" measures in March 2020 created a new challenge for us in how to maintain our vital services for local people. Within less than two weeks we had moved from an office based advice and information service to one entirely delivered from home by telephone and email. As lockdown measures eased in the summer, and in response to an increasing recognition that there were some people who needed our face-to-face support, we returned to offering a limited Covid 19 safe face-to-face service, using video technology in each of our four offices. This necessitated a temporary move from our office in Bridge Street, Godalming, to space at the Godalming Baptist Church in Queen Street, Godalming.

Help to Claim service

We continued to contribute to the national "**Help to Claim**" service in 2020/21. "Help to Claim" is a dedicated service providing free support to people through the early stages of a new Universal Credit (UC) claim from application to first payment. It includes help with things like how to gather evidence for an application or how to prepare for a first JobCentre appointment.

We provide both a face-to-face service at each of our four offices, and support the national "Help to Claim" telephone helpline service.

During 2020/21 we helped over 750 people make their initial claim through this service.

This service is entirely funded nationally by the Department for Work and Pensions.

Surrey Crisis Fund

Over the year 2020/21 we continued to help local people in financial crisis to access financial support from Surrey County Council's "Surrey Crisis fund".

Our Advice Service

Key Achievements in 2020/21 (continued)

Healthwatch Surrey

In 2020/21 we reported on 31 different issues. The evidence we provide helped Healthwatch Surrey to highlight key issues to decision-makers within the health and care sector.

Healthwatch Surrey acts as the voice of local people in helping to improve the local provision of health and care services.

Since the onset of Covid-19 cases we have also provided specific support to Healthwatch Surrey's work in helping the NHs and social care providers to understand what is working and what is not working so well for local people during this health crisis.

Research and Campaigns

Our twin and equal aims are to provide the advice people need for the problems they face and to improve the policies and practices that affect people's lives. Therefore, we need to ensure that we maximise our ability to spot trends, highlight issues and provide a bank of evidence to influence present and future policies. It will continue to be a core aim of Citizens Advice Waverley and national Citizens Advice to provide evidence to support and stimulate debate, to campaign and lobby on key social policy issues, and to influence both policy makers and service providers.

We endeavour to influence policy in the areas of:

- Benefits and tax credits;
- Consumer goods and services;
- Credit;
- Debt and financial services;
- Employment;
- Essential services;
- Equality and discrimination;
- Health and social care;
- Housing;
- Immigration and asylum;
- Legal issues;
- Other local issues.

Most of the issues championed by our local R&C team in 2020/21 related to the impact Covid had on the community. These issues were passed onto Government and our MP.

In addition the local R&C team provided feedback on possible improvements to the Disability claims system to the DWP in national sessions.

Our Advice Service

Key Achievements in 2020/21 (continued)

Maintaining high quality services

Training our People

Training remains a key element of our ability to provide local people with the best possible quality information and advice services.

It is a tribute to our paid staff and volunteer team that they managed to maintain a full, wide-ranging training programme during the Government restrictions imposed to combat the Covid 19 pandemic, through new and innovative use of our online and video technology. I would like to thank Maria Mateo our Training Manager for her support to our volunteers. Maria has now moved on and we wish her every success in her new venture.

Benchmarking our processes

In 2020/21 Citizens Advice's auditors again found our processes to be fully meeting their national standards and awarded us their top, "Green" status across the board

Telling our story

Telling people about the positive impact and benefits of our work to individuals and the community as a whole is key to our maintaining local support for our services. Over the year our Communications Group produced a series of detailed articles published in the local media. In addition they posted regular updates about our work on Facebook and Twitter, reaching audiences of up to 20,000 local people.

Raising funds

The funding we receive from our local authority grants does not cover the full running costs of the wide range of services we offer. Each year we therefore need to supplement our income through:

- additional grants from charitable trusts
- raising money from project funding, including our Help to Claim and our Energy Advice projects, and
- volunteer led popular fundraising activities, including quiz nights, stalls at local fairs and other sponsored events.

In 2020/21, despite the cessation of all local fundraising events, we were able to raise over £25,000 of additional funding from charitable trusts and project funding.

Much of this funding was directed at ensuring that those people affected by the Covid 19 pandemic were able to get the support they required in ways that they could easily access.

Our Advice Service

Our staff team

Chief Executive



**Advice
Session
Supervisors
Cranleigh**

**Advice
Session
Supervisors
Farnham**

Finance Officer

IT Officer

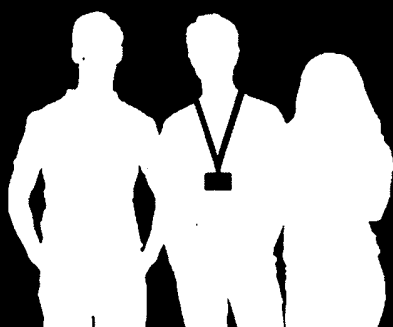
Our Advice Services

Our volunteers (2020/21)

114

Volunteers

(including trustees, advisers, assessors, receptionists, administrators, campaigners and fundraisers)



66

Advisers

10

Assessors

76

**Money & Pension
service**

Trained & Accredited



**Money &
Pensions
Service**

25

Trainees

10

**Admin /
Reception**

**Youngest: 20 years old
Longest serving: 27 years**

**5 people have
volunteered with us for
more than 20 years!**

5

Campaigners / Fundraisers

7

Trustees

Our Advice Services - Changing lives in 2020-21

Giving back control

The right advice provided at the right time can really change people's lives. It provides them with the information, support and confidence to find a way forward and take back control of their lives.

We deliver money-management training to people at risk of financial exclusion. We also provide locally-based advice services in Waverley's most deprived areas as well as a home-visiting service for older or disabled people who can't get into our advice centres*.



2 in every 3
clients have their
problem solved



4 in 5
clients said advice
improved their
lives, including
reducing stress
and improving
finances



90%
of our clients
reported
satisfaction with
the overall
service

Benefitting Everyone



Reducing social exclusion by helping with over 18,000 different issues, including securing nearly £2 million in unclaimed financial entitlements



Supporting working people with over 2,000 employment related issues.



Saving taxpayers money by helping 112 local individuals and families who were homeless or at immediate risk of losing their homes.



Improving people's lives by highlighting examples of poor or ineffective policy or services; by providing volunteer opportunities for more than 114 volunteers, handling over 166 family and relationship issues and 96 consumer related issues.



Partnering with Surrey County Council to deliver Surrey Crisis Fund (SCF) payments to local people facing severe financial crisis and providing evidence to Healthwatch Surrey to improve local health and social care services.

“ I had reason to use Citizens Advice Waverley two years ago and I can't tell you how amazing they were and sorted a very complicated situation out for a vulnerable adult I was looking after. ”

Client quote

Our Advice Services

Helping to shape a fairer world

Tackling the big issues

Because we help many thousands of people each year we have our finger on the pulse of what's happening in society, both locally and nationally. We use the evidence we collect in this way to campaign for social justice.



13,231 Issues



3,038 benefit issues



1,282 housing issues

Over 1,100 evidence forms submitted to support change in local / national organisations and government processes, 160 of which were Universal Credit issues and 60 Debt issues.



753 clients helped by our Help to Claim (Universal Credit) team.



3,240 calls to our Adviceline



£ 2.1m Financial outcome for our clients

“

I found the person I spoke to extremely helpful and gave good advice. I was really pleased.

”

Client quote

Our Advice Services

Looking forward

Looking forward

The restrictions imposed by the Covid pandemic required everyone to find new and innovative ways of working and delivering their services.

Citizens Advice Waverley was no exception and we quickly developed a home-based volunteer team to provide support by phone, email and webchat to both local people and national clients. We also developed a video-technology based approach to delivering our face-to-face sessions at our offices to ensure we were able to provide this critical service whilst complying with the social distancing rules.

In this way we were able to provide more people with the help they needed in the ways that best suited them during this crisis.

The move to digital

Whilst our face-to-face service will always remain central to what we do, and crucial to supporting the most vulnerable people, we must also respond to the increasing demand to receive services digitally. This has been building for a number of years across many areas of life and was accelerated dramatically by the advent of Covid 19. We need to respond to this change and ensure that we use the valuable lessons we have learnt during the current crisis

to expand the accessibility of our services. This will include increased phone, email, webchat and potentially video services.

Working together

Another lesson is that services can be delivered more efficiently if we work together with others. That is why we are joining the Citizens Advice Single Queue Adviceline phone project this year. By pooling our resources with other Citizens Advice offices across the country we will be able to provide local people with longer operating hours and improved call answer rates. We are also sharing with other Citizens Advice offices our experience of using video and how we might expand this service into the local community.

The next few years will present fresh challenges for many of our funders, as they face the prospect of reductions in their income and increasing demands on services. We will liaise closely with them to ensure that our organisations work together as effectively and efficiently as possible, maximising the benefits of joint working wherever possible.

The next year is likely to see many changes, but these will all be underpinned by our core values and our determination to provide the best possible support for local people in these difficult times.

Our Advice Services

Case Study

Nicky's story

Nicky* and her partner Clare* had rented a cottage two years ago. It was their dream home, and they were so happy. Then came the pandemic. Initially they didn't worry too much as they were not elderly, but as the pandemic progressed Clare did get Covid, she got it badly and four weeks later she tragically died. Nicky was devastated.

This was not a situation they had considered at all. Nicky didn't know how to start figuring out what to do. A friend suggested that she might contact her local Citizens Advice – although their offices were closed, she could still contact them by phone or e-mail via their website. Nicky followed her friend's advice.

How we helped Nicky

Nicky spoke to an adviser who checked what type of tenancy she had. The adviser went through her finances with her, checked if she could reduce any of her bills, claim any benefits or maximise her income in other ways. The rent on the property was the major problem with only one income to contribute. Nicky did not want to run up debts which she couldn't repay, and which would eventually lead to eviction. One option the adviser offered was to take in a lodger (assuming that the landlord agreed) but she could not bear to think of sharing the cottage where she and Clare had been so happy with someone else.

Leaving her to consider her options, the adviser gave Nicky the details of a bereavement counselling service.

Then a colleague announced that she was moving from her one bedroom rented flat to look after her elderly father. Clare asked about the flat and found that it was convenient and would be affordable. She would need to put down a deposit, but she had a small amount of savings and should be due the return of the deposit which had been put down on the cottage, so she decided to proceed with the flat and give in her notice on the cottage.

Return of the deposit

However things don't always go as planned and the cottage landlord was only prepared to return half of the deposit because of damage caused by leaks during the tenancy. Nicky rang Citizens Advice again and asked for help with the deposit. The adviser asked if the deposit had been placed in a deposit protection scheme. Checks revealed that her landlord had not met this legal requirement. Nicky also said that they had informed the landlord of the leaks (which were the landlord's responsibility).

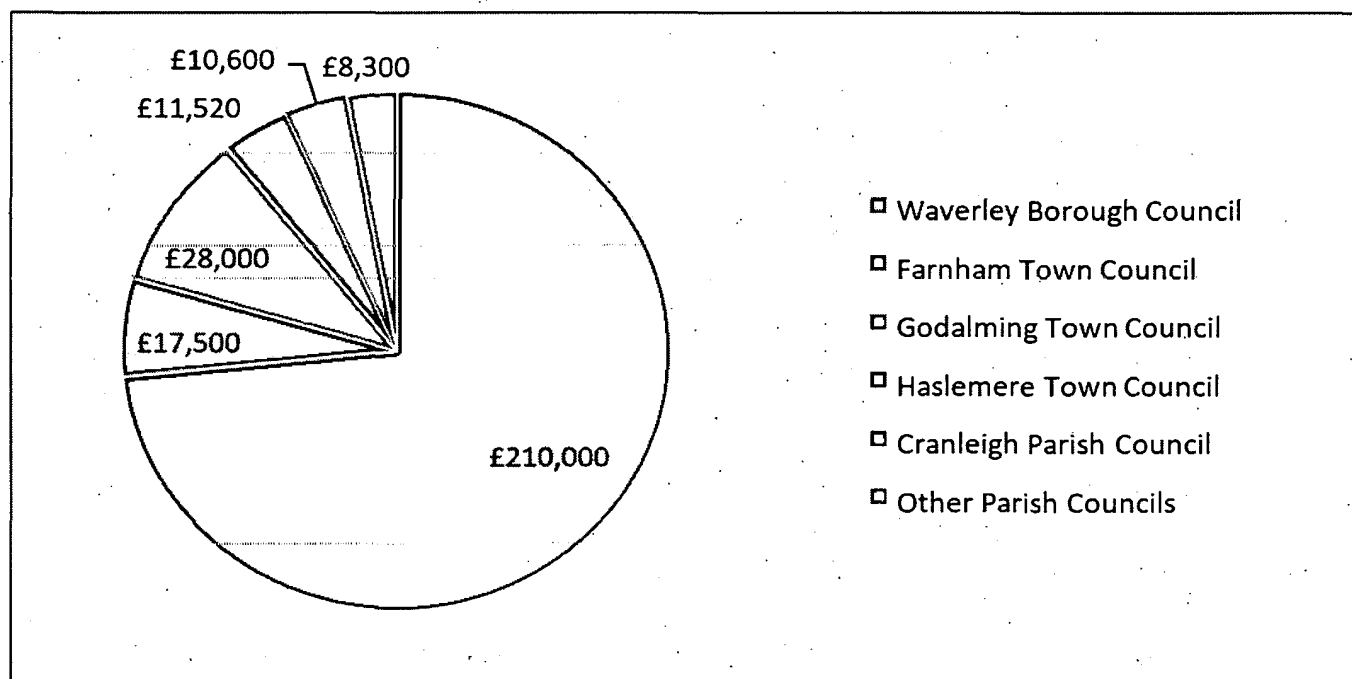
The adviser offered to help Nicky to write a letter to the landlord pointing out the responsibilities and setting a deadline for return of the full deposit.

*This is a typical story of a client's problem. Names and some details have been changed to ensure client confidentiality.

Our Advice Services - Thanks to our supporters

Local Authority Grants

Our work would not be possible without the financial support we receive from our local authorities. The chart shows grants received in 2020/21 from Waverley Borough Council and our towns and parishes towards the costs of running our advice service.



Other Parish Council contributions received during 2020-21

Bramley
Busbridge
Chiddingfold
Dunsfold
Lurgashall
Lynchmere
Northchapel
Shere
Witley

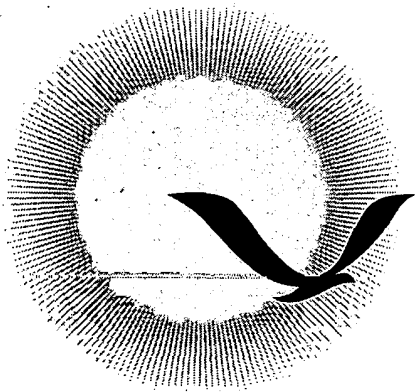
Our Advice Services

Thanks to our supporters (continued)

We would like to thank the many people and organisations who provide generous financial support in addition to the grants we received from our local authorities, in 2020/1. Without these contributions we would not be able to continue the level of support we give to Waverley residents and workers during the course of the Covid pandemic.

Rotary Club Godalming
Charities Trust
Hedgehogs
Waitrose Godalming
Waitrose Farnham
MVM Charitable Trust
Charities Trust
Godalming Unitarians
Inner Wheel Farnham
NEXUS
Ellens Green Mission Fund
National Lottery
Community Foundation for Surrey

We would also like to give a special thanks to the members of our volunteer led Income Generation Team who helped identify and successfully apply for this funding.



South West Surrey

Domestic Abuse Outreach Service



Domestic Abuse Outreach Service

Chief Executive's Overview

The year commenced with the team working from home as the country went into the first national lockdown. We had to quickly adapt our ways of working to ensure we could continue to support those in need.

We worked closely with partner agencies to raise public awareness of domestic abuse. We needed to ensure survivors were aware that we were still operational and there to provide continuing support by looking at different ways individuals could reach out to us.

The service saw a 50% increase in referrals in 2020/21 compared to the previous year placing significant additional demands on an already busy team. We were fortunate to receive vital funding through various donors, including the Ministry of Justice, to provide additional resources to support this increase.

Group work was put on hold for the first part of the year due to the lockdown and we were unable to facilitate face to face meetings. However, in September we were pleased to recommence the Freedom Programme for our survivors. This followed careful risk assessment and planning to ensure the safety of all concerned. In addition, we were able to provide our monthly survivor groups enabling face to face meetings with an outreach worker and access to a solicitor.

One of the most significant developments this year was the growth of our volunteer resource. We were able to appoint a volunteer co-ordinator to oversee and manage this important piece of work.

Discussions took place with health

and commissioning colleagues to provide an IDVA (Independent Domestic Violence Advocate) within each of the acute hospital settings in Surrey. We worked closely with our local hospital to develop this post with the successful implementation of the new role taking place in April 2021.

Due to the expansion of the team and the necessary social distancing requirements, we had to seek alternative accommodation as the shared office with our advice colleagues was no longer suitable. We managed a successful move to new premises overseen by the team with minimal disruption to the service and quickly established ourselves within the new office.

Towards the end of the year, we were fortunate to secure funding which enabled us to expand our counselling service and to engage the services of a clinical psychologist. This role provides further support for our children whose mental health has deteriorated, not only as a result of the domestic abuse being experienced but also by the anxieties of the pandemic.

Domestic Abuse Outreach Service

Chief Executive's Overview (continued)

The past year has presented the domestic abuse team with significant operational challenges against a backdrop of rising demand for our services. However, despite the additional restrictions and uncertainty that the pandemic has presented, the team have remained positive and committed. They have risen to the challenge and worked above and beyond expectation to not only maintain the service but to continually seek ways in which they can enhance the support we offer. I was delighted

that the team won 'Team of the Year' at the National Citizens Advice Annual Conference Awards 2021. This is testament to their ongoing determination to support survivors of domestic abuse no matter how daunting the circumstances may be. We are one of the very few Citizens Advice organisations to provide a dedicated domestic abuse service and we can be very proud of what we have achieved and the quality of support we deliver.

Cath Jago

What We Do

South West Surrey Domestic Abuse Outreach Service is a member of the Surrey Domestic Abuse Partnership - a group of four independent charities - working together across the whole of Surrey to ensure that survivors of domestic abuse are safe, and to build a future where domestic abuse is not tolerated.

The service does this by providing free, confidential, independent and impartial advice to anyone aged 16 or above affected by domestic abuse living in the boroughs of Waverley and Guildford. The service provides skilled practical help, ongoing emotional support, and information and advice on issues such as safety planning, housing rights, relationships and separation, civil and criminal court proceedings, and the needs of children affected by domestic abuse. The support offered can be on the telephone, face to face at a safe venue, or by email.

“ Without the support, I would not have been able to move forward, the team has given me strength and hope for the children and myself ”

Survivor quote

Domestic Abuse Outreach Service

Year at a Glance

The people our domestic abuse service helped:



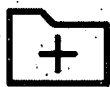
902

clients supported



1,292

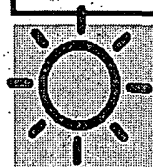
new referrals



225

cases supported through MARAC

(Multi Agency Risk Assessment Conference)



35

women supported through the Freedom Programme



Over 450

professionals trained



244

one to one sessions provided to children and young people

Domestic Abuse Outreach Service

Key Achievements in 2020/21

Our outreach service provides emotional and practical support to those experiencing domestic abuse in the Guildford and Waverley Boroughs. We work from a needs-led and strengths-based perspective to ensure that each client is treated as an individual. We offer a wide range of services including:

- One to one support providing information and support both short and long term
- Risk assessment and safety planning
- Providing advocacy for clients when approaching other agencies for other help and support
- Referral or signposting to other agencies when client needs cannot be fully met by Outreach
- Supporting and referral of those needing refuge accommodation
- One to one support for children affected by domestic abuse from specialist children's workers
- Work in schools and support for Home School Link Workers
- Access to legal support through Survivors Group.
- Access to free qualified counselling to clients

Not only do we work with clients on a one to one basis we also deliver the Freedom Programme. These groups enable survivors to understand more about the abuse they have experienced and grow in confidence and self-esteem as well as being a great opportunity to build friendships and benefit from peer support. We follow on from the Freedom Programme providing confidence building and social skills sessions.

As part of the Surrey Domestic Abuse Partnership services, our Outreach Workers also provide an IDVA (Independent Domestic Violence Advocate) service to individuals who are going through the criminal court system. This support can be vital as many people find the criminal justice system confusing and frightening. Our IDVAs provide information to the survivor as well as ensuring the survivor's voice is heard in the court hearing themselves.

We also attend our local MARAC (Multi Agency Risk Assessment Conference) where the highest risk victims in our areas are discussed confidentially with other agencies such as the police, social care, housing, probation and others and a risk management plan is put together.

Our monthly drop in Survivor Groups provide an informal setting for clients to meet with other survivors as well as members of the Outreach team for mutual support and practical help, including access to free legal advice from a solicitor during the session.

Our outreach service also strives to ensure that other professionals, agencies and organisations are more aware of domestic abuse and are able to give

Domestic Abuse Outreach Service

Key Achievements in 2020/21 (continued)

an appropriate response to survivors who may approach them for help.

This year we delivered training and awareness raising sessions to the following organisations:

- Amnesty International
- Cranleigh Community Radio
- Community Mental Health Services
- Young Carers
- Schools within Guildford and Waverley

Our children's outreach service provides one to one therapeutic support to children who have been affected by domestic abuse. The children are referred from our adult outreach service and usually the children of our outreach clients. During one to one sessions the children are encouraged to speak openly in a safe and non-judgemental environment. They are supported through therapeutic art and are enabled to explore their thoughts and feelings around their personal safety, self awareness, self-worth, self-esteem and sense of purpose. We aim to give the children the opportunity to move beyond what happened in their family and recognise it was not their fault. The sessions are child-centred and needs led.

In order to best support a child or young person it is crucial we have a full understanding of the child's experiences. By meeting directly with the non-abusive parent, we have been able to carry out one to one assessments to ascertain what support the child would benefit from and whether intervention from our service is suitable.

We have provided consultancy and guidance to the social care team, supporting the identification of domestic abuse on a case by case basis. We have discussed how best for workers to approach the subject of domestic abuse and encouraged them to talk through the cycles of abuse so those affected can understand and be able to recognise these triggers. We have developed close multi-agency relationships enabling survivors to receive the best support possible.

Raising Funds

We have successfully raised funds for our adult outreach service, our children's service and our counselling services.

Domestic Abuse Outreach Service

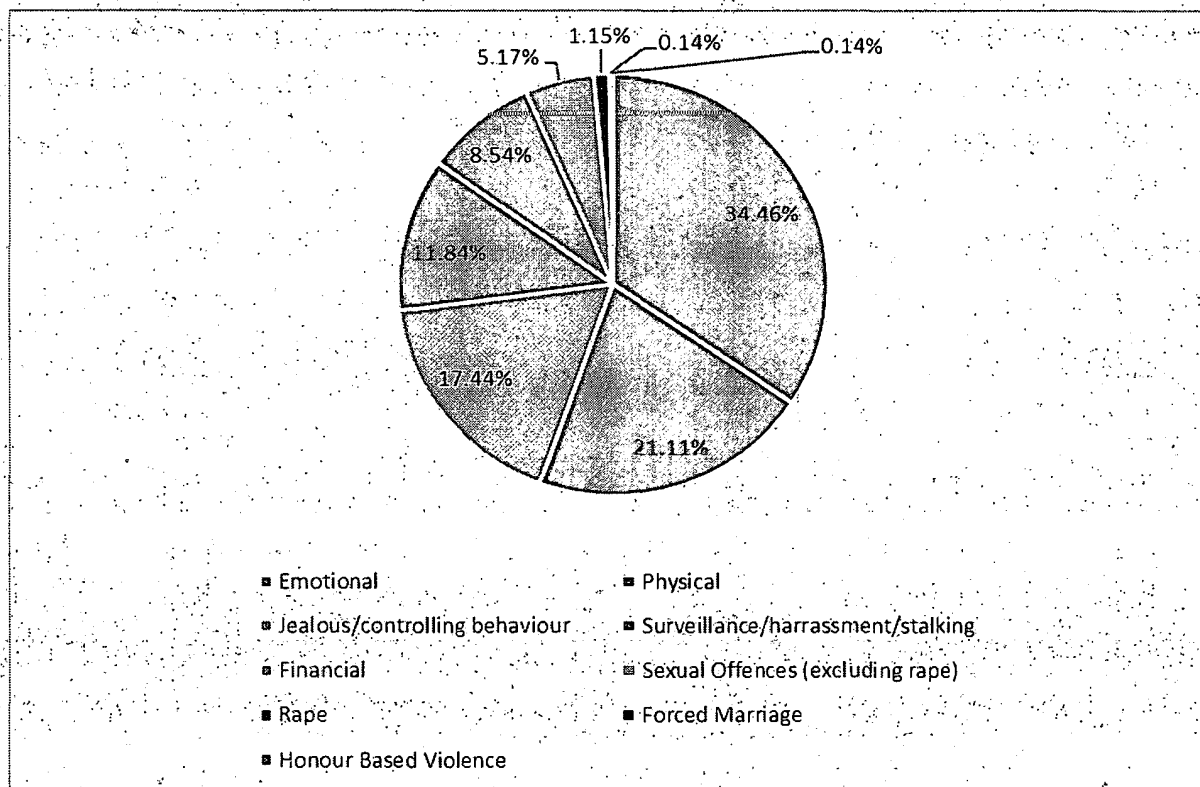
Supporting those affected by domestic abuse

We help by giving skilled practical assistance, ongoing emotional support, information and advice. We cover issues such as safety planning, housing rights, relationships and separation, civil and criminal court proceedings, and the needs of children affected by domestic abuse.

We listen to the survivor's situation - initial calls can take up to two hours with regular follow-up meetings. Often clients need support across months or even years, as they build their own support network and take the path to survival. Clients can attend a monthly Survivors Group where they can meet other survivors, access legal advice and get peer support.

We also run a Freedom Programme to support survivors going forward, empowering them with knowledge of signs and tactics of abusive behaviours.

Types of Abuse



Domestic Abuse Outreach Service

Supporting those affected by domestic abuse

Our workload

unique actions generated

10,800



Admin and letters

256



Telephone calls

8,214



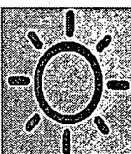
Emails

1,308



In person support

298



Other actions including Specialist Domestic Abuse Court (SDAC) and Multi Agency Risk Assessment Conference (MARAC) updates.

724

Referral source

Police	50%
Self referral	10%
Other agencies	40%

Referrals by gender

Female	- 92%
Male	- 8%

Domestic Abuse Outreach Service

Our team

Chief Executive Officer



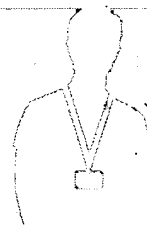
Service Manager



Adult Outreach Workers



Children's Outreach



Volunteer coordinator

Finance Officer

IT Officer

Admin

Training Supervisor

Clinical Supervisors

Domestic Abuse Outreach Service

Our value to society

Our values (developed together with our domestic abuse outreach partners) include:

- Working with survivors and children on a needs led, strengths based, trauma informed basis;
- believing in survivors and children and putting them at the centre of all the work;
- being non-judgemental;
- placing the responsibility for the abuse with the perpetrator;
- working with survivors to empower and inform them;
- providing services that are free of charge, impartial, independent and confidential;
- working with survivors and children to meet their needs, increase safety and freedom; and
- working in a multiagency environment to meet the needs of the survivors and children.

The Crime Survey for England and Wales year ending March 2020 reported an estimated 5.5% of adults (2.3 million) experienced domestic abuse in the last year.

- 1.6 million women and 757,000 men.

In England and Wales over 21% of adults have experienced domestic abuse since the age of 16 years

- Around one in five children have been exposed to domestic abuse.

The police in England and Wales recorded 758,941 domestic abuse-related crimes in the year ending March 2020

- 9% increase from the previous year (this continues an ongoing trend that may reflect improved recording by the police alongside increased reporting by victims).

Domestic Abuse Outreach Service

Our value to society

Over one third of violence against the person offences recorded by Police in England and Wales in year ending March 2020 were domestic abuse related.

Police in Surrey recorded 9,189 incidents of Domestic Abuse for the year ending March 2020.

Waverley and Guildford boroughs have a significant rural population. In the 2019 report undertaken by the National Rural Crime Network "Captive and Controlled" it can be seen that:

- Rural victims are half as likely to report their abuse to others.
- Rural victims' abuse goes on significantly longer.
- Rural victims cannot readily access support services.
- Rural victims live in a society that often protects the perpetrators.
- Rural victims are isolated, unsupported and unprotected in a rural hell, which is purposefully 'normalised'.

“ The service has helped me emotionally, I would be utterly lost without it and not knowing how to move forward with my life. ”

Survivor quote

Domestic Abuse Outreach Service

Looking forward

Responsiveness

A number of exciting new roles have been created within the team and we continue to explore further opportunities to develop and enhance our services. Key roles include additional adult and children outreach workers and a new youth worker role. The HIDVA (Hospital Independent Domestic Violence Advocate) role will provide additional critical support within the health setting. We have also introduced a new LGBTQ+ outreach worker role which will help us reach out to survivors within those communities. The children's groups which we temporarily had to suspend due to the pandemic have been reintroduced and we are planning for further groups over the coming year.

Communication

Critical to the delivery of a responsive and reliable domestic abuse service are the links between all agencies involved. Regular contact and sharing of good practice with our partners and all key stakeholders underpins all our work. Work is underway with Guildford Borough Council and Waverley Borough Council to raise awareness of domestic abuse with their partner agencies and local businesses. This includes offering training and support with workplace domestic abuse policies and how to appropriately respond to any disclosures.

Fundraising

We continue to apply to relevant national and local organisations for grants or any other financial support available. Covid has had a negative impact on traditional methods of fundraising and it is now essential that we find new and innovative ways to fundraise. Additional resourcing and creative expertise will be required to ensure that we explore all avenues and maximise opportunity.

Service Development

We continue to expand our workforce so that rising demand can be met without compromising the quality or range of service. As with all service developments it is vital that we build in resilience to ensure that once we begin to extend our service provision to survivors and their children, we are in a position to sustain this.

As in past years, recruitment and retention of staff will be critical to both current day to day operational activity and support for future service expansion.

Conclusion

As an organisation we will need to be flexible and responsive to ensure that we always provide the best possible service to our survivors and their children.

Domestic Abuse Outreach Service

Case study

Emma's story

age 35, Waverley

Emma* had been victim to a long history of physical assault and control from her then husband. He took money to buy alcohol and forced her to take drugs. In the most recent incident, he was so violent towards her that her children, who witnessed much of the abuse, called for an ambulance.

How we helped

Emma was referred to our service via the Police. Our outreach team listened to Emma and gave her ongoing emotional and practical help to support her on her journey from victim to survivor. We believed in Emma and sought assistance from a drug and alcohol agency for rehabilitation support, found housing support via Citizens Advice Waverley and worked with social services. Our dedicated team member acted as an advocate on her behalf and helped her to obtain a restraining order against her husband. Emma participated in our counselling service, helping her to build her courage and confidence and sought a place on the Freedom Programme, a course for survivors of domestic abuse to make sense of what has happened to them and recognise it's not their fault.

Our dedicated Children's Team supported Emma's children, enabling them to talk about their traumatic experiences in a safe environment and share their fears and worries. When Emma met a new partner, we supported her to request a Domestic Violence Disclosure to ensure he had no history of violent behaviour. Her ex-partner is now in prison for his crimes. Emma is rebuilding her life free from abuse.

*This is a typical story of a client's problem. Names and some details have been changed to ensure client confidentiality.

Domestic Abuse Outreach Service

Thanks to our supporters

Thank you to the many people who provided generous financial support this year for our domestic abuse service. The following organisations also provided financial support for our work:

Surrey County Council
Surrey Police
Office of the Police and Crime Commissioner for Surrey
Guildford Borough Council
Waverley Borough Council
Community Foundation for Surrey
Guildford Poyle Charities
Rotary Club of Godalming
Rotary Club of Godalming Woolsack
Parish of Shere and Peaslake
Masons
Waitrose Farnham
Chiddingfold Handmade for Heroes
Christ Church Shamley Green
BAE Systems Applied Intelligence
Hambledon Parish Council
Witley Parish Council
Resolution Surrey
Surrey Hardship Fund

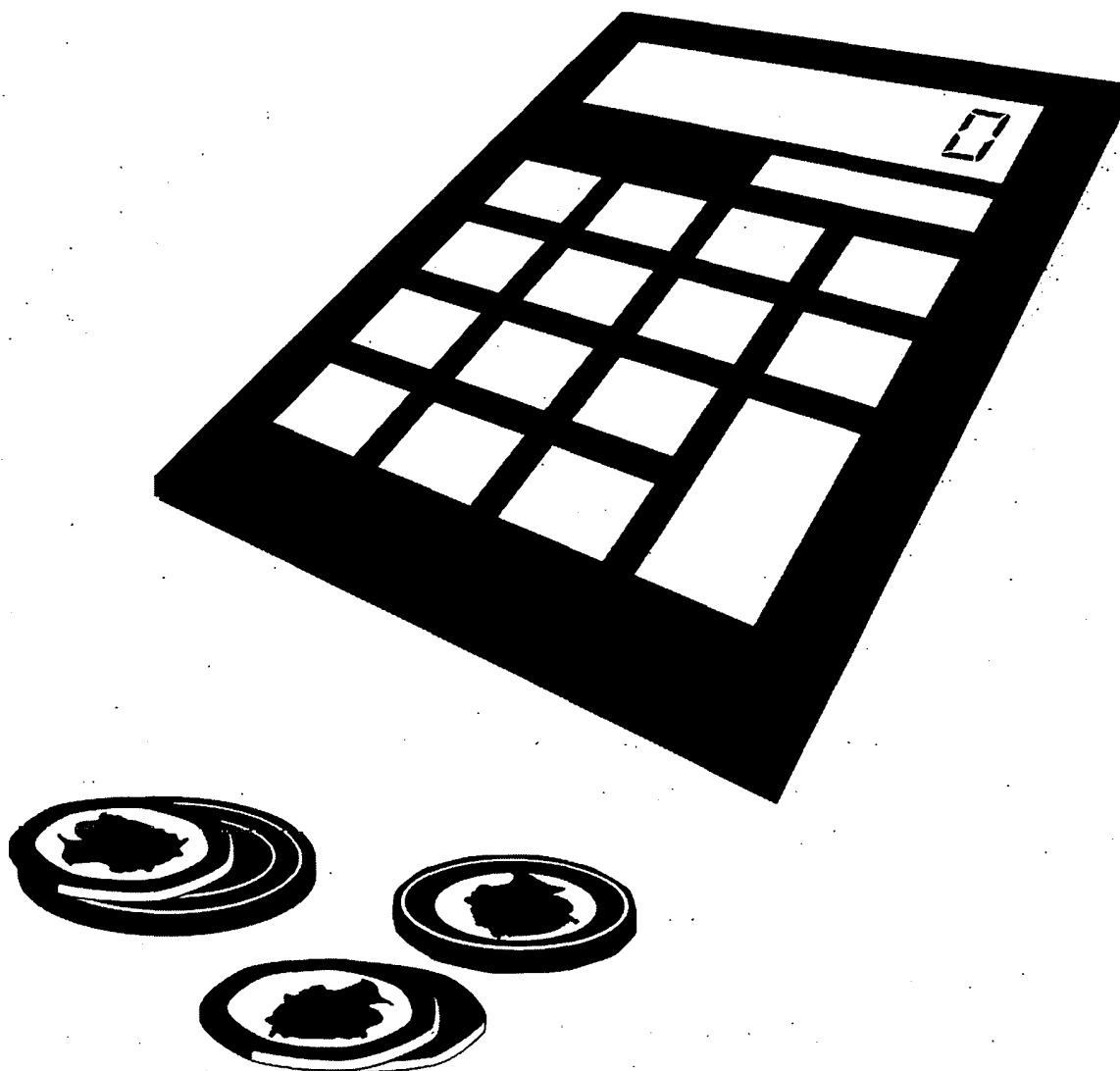
We would like to thank the local solicitors who volunteered their time and expertise free of charge to help our clients.

We would also like to thank Emmanuel Church, Guildford United Reformed Church and Godalming Christian Science Church who provided accommodation to support the work of our service.

“ The service has been a lifeline for me and gave me the extra confidence to keep moving forward with a positive outlook ”

Survivor quote

Our accounts



Chair's Overview

Financial Review

General

The accounts below show the financial results for the year. In summary, an operating surplus of £155,195 was recorded. This comprised:

An operating surplus of £75,307 for the Citizens Advice section of the organisation. This includes a £30,124 surplus on unrestricted funds and a £45,183 surplus on restricted funds. The surplus is primarily due to the receipt of grants where further expenditure is expected to be incurred in the 2021/22 financial year.

An operating surplus of £79,888 for the SWSDAOS section of the organisation. The surplus is primarily due to the receipt of grants where further expenditure is expected to be incurred in the 2021/22 financial year.

Funds and Reserves

During the year the Trustees agreed that the target for the minimum balance of reserves should be increased from the equivalent of three months' operating expenditure to six months' operating expenditure. This decision was taken as it is the Trustees' view that the financial risk and uncertainty that the charity faces has materially increased. The actual position at 31 March 2021 was as follows:

The Citizens Advice section of the organisation had unrestricted reserves of £159,253 which compares to an average six months of operating costs of £190,344.

The SWSDAOS section of the organisation had reserves of £131,248 which compares to an average six months of operating costs of £128,719.

Funding

The Trustees are grateful to all our local town and parish councils and to Waverley Borough Council for their continuing financial support of Citizens Advice.

The Trustees are equally grateful to Surrey County Council and the Office of the Police and Crime Commissioner for Surrey for their continuing financial support for SWSDAOS. In addition, the Trustees would like to acknowledge the additional grants received from the Ministry of Justice, other funders and individuals who provided additional resources to support SWSDAOS during the course of the Covid pandemic.

Chair's Overview

Trustees' Responsibilities in respect of these Accounts

Company law requires Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company at the year end and of the net incoming resources of the charitable company for the year then ending. In preparing these financial statements, Trustees are required to:

- select suitable accounting policies;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare financial statements on a going-concern basis unless it is inappropriate to assume that the company will continue on that basis.

Trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company, and to enable it to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Board on 13th December 2021 and signed on their behalf:



Paul Rees - Chair of Trustee Board

Report of the Trustees and unaudited financial statements

REGISTERED COMPANY NUMBER: 04823693 (England and Wales)
REGISTERED CHARITY NUMBER: 1098859

Report of the Trustees and
Unaudited Financial Statements
for the Year Ended 31 March 2021
for
Citizens Advice Waverley
(A Company Limited by Guarantee)

PPK Accountants Limited
Chartered Certified Accountants
Sandhurst House
297 Yorktown Road
Sandhurst
Berkshire
GU47 0QA

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Contents of the Financial Statements for the Year Ended 31 March 2021

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Independent Examiner's Report	5
Statement of Financial Activities	6
Balance Sheet	7 to 8
Notes to the Financial Statements	9 to 17
Detailed Statement of Financial Activities	18 to 19

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Report of the Trustees for the Year Ended 31 March 2021

The trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the year ended 31 March 2021. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

Citizens Advice Waverley is a local charity and limited company providing a free, independent and non-judgemental information and advice service to people in Waverley borough and support to people living in Guildford and Waverley boroughs affected by domestic abuse.

Our Advice Service offers free confidential advice on a wide range of issues, online, over the phone or in person. We work with other voluntary organisations, both locally and nationally, to provide people with the information, support and practical help they need to find a way through their problems.

As a member of Citizens Advice (the operating name of the National Association of Citizens Advice Bureaux), we receive a range of support, including specialist information services, and research to use in our campaigning work. Citizens Advice also provides a range of infrastructure services to support the smooth running of our business.

We have a three-year Service Level Agreement with Waverley Borough Council that establishes our working relationship with them and similar contractual arrangements with other funders.

Our Domestic Abuse Service is a member of the Surrey Domestic Abuse Partnership (SDAP) - a group of four independent charities working together across the whole of Surrey to ensure that survivors of domestic abuse are safe, and to build a future where domestic abuse is not tolerated. Working with partner agencies, we support the delivery of the Surrey Against Domestic Abuse Strategy:

- To provide specialist domestic abuse outreach support within local communities empowering survivors to achieve independence, safe and free from harm caused by perpetrator behaviour.
- To provide tailored specialist support for children and young people as well as adult survivors.
- To work with affected non-abusive family members as part of a joined-up pathway delivering support at the right time in the right place.

We have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing our objectives and activities and in planning our future activities.

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Report of the Trustees for the Year Ended 31 March 2021

ACHIEVEMENT AND PERFORMANCE

Advice Service

Supporting local people

Despite the limitations placed on our services by the Covid 19 crisis, during 2020/21 our core advice service supported 6,264 people with information, advice on well over 18,000 different issues, helping raise over £2 million of entitlements for our clients.

Maintaining our services during the Covid 19 crisis

In previous years more than half of our clients have used our office based face-to-face services. The introduction of the "lockdown" measures in March 2020 created a new challenge for us in how to maintain our vital services for local people. Within less than two weeks we had moved from an office based advice and information service to one entirely delivered from home by telephone and email. As lockdown measures eased in the summer, and in response to an increasing recognition that there were some people who needed our face-to-face support, we returned to offering a limited Covid 19 safe face-to-face service, using video technology in each of our four offices. This necessitated a temporary move from our office in Bridge Street, Godalming, to space at the Godalming Baptist Church in Queen Street, Godalming.

Domestic Abuse Service

Our community outreach service provides emotional and practical support to those experiencing domestic abuse in the Guildford and Waverley Boroughs. We work from a needs-led and strengths-based perspective to ensure that each client is treated as an individual.

We offer a wide range of services including:

- * One to one support providing information and support both short and long term
- * Risk assessment and safety planning
- * Providing advocacy for clients when approaching other agencies for other help and support
- * Referral or signposting to other agencies when client needs cannot be fully met by Outreach
- * Supporting and referral of those needing refuge accommodation
- * One to one support for children affected by domestic abuse from specialist children's workers
- * Work in schools and support for Home School Link Workers
- * Access to legal support through Survivors Group
- * Access to counselling (offering free qualified counselling to clients)

Not only do we work with clients on a 1:1 basis we also deliver the Freedom Programme. These groups enable women to understand more about the abuse they have experienced and grow in confidence and self-esteem as well as being a great opportunity to build friendships and benefit from peer support. We follow the Freedom Programme providing confidence building and social skills sessions.

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Report of the Trustees for the Year Ended 31 March 2021

FINANCIAL REVIEW

In summary, the financial results for the year to 31 March 2021 show an operating surplus of £155,195. This comprised:

An operating surplus of £75,307 for the Citizens Advice section of the organisation - This includes a £30,124 surplus on unrestricted funds and a £45,183 surplus on restricted funds. The surplus is primarily due to the receipt of grants where further expenditure is expected to be incurred in the 2021/22 financial year.

An operating surplus of £79,888 for the SWSDAOS section of the organisation - The surplus is primarily due to the receipt of grants where further expenditure is expected to be incurred in the 2021/22 financial year.

Funds and Reserves

During the year the Trustees agreed that the target for the minimum balance of reserves should be increased from the equivalent of three months' operating expenditure to six months' operating expenditure. This decision was taken as it is the Trustees' view that the financial risk and uncertainty that the charity faces has materially increased. The actual position at 31 March 2021 was as follows:

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The SWSDAOS section of the organisation had reserves of £131,248 which compares to an average six months of operating costs of £128,719.

Funding

The Trustees are grateful to all our local town and parish councils and to Waverley Borough Council for their continuing financial support of Citizens Advice Waverley.

The Trustees are equally grateful to Surrey County Council and the Office of the Police and Crime Commissioner for Surrey for their continuing financial support for SWSDAOS. In addition, the Trustees would like to acknowledge the additional grants received from the Ministry of Justice to provide additional resources to SWSDAOS during and in the aftermath of the pandemic.

The Trustees would also like to thank the many individuals who have made donations.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

Trustee selection

We recruit trustees through an open, competitive process, using local media and our own network to find people with suitable skills and experience to provide good leadership and make sound decisions. New trustees are provided with an Induction and have meetings with other trustees and relevant members of the Management Team. This provides an opportunity to learn more about the organisation's work, focus on current Board priorities and to assess any individual training needs.

Risk management

Our trustees are responsible for the effective management of risk and for making sure that internal controls are in place and operating as designed. They have reviewed their procedures in the light of corporate governance guidance contained in the Statement of Recommended Practice "Accounting and Reporting for Charities". A risk assessment report is contained in the business plan and anticipates potential changes to the environment in which we work and how these would impact on our services. In addition they maintain and regularly review a risk register which identifies key risks, including funding.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Company number
04823693 (England and Wales)

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Report of the Trustees for the Year Ended 31 March 2021

Registered Charity number
1098859

Registered office
New Montrose House
36 Bridge Street
Godalming
Surrey
GU7 1HP

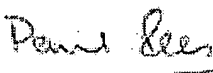
Trustees
P Rees - Chair of Trustee Board
Ms J Moore
I M Adams-Cairns (resigned 20.7.20)
J T Pepper
N M Jewkes
P G Jackson (resigned 8.10.20)
Ms J Goodall (resigned 20.7.20)
F Aftab (appointed 25.11.20) (resigned 1.10.21)
Ms J Armstrong (appointed 25.11.20)
Ms J Edwards (appointed 25.11.20)

Company Secretary
Ms J Moore

Independent Examiner
PPK Accountants Limited
Chartered Certified Accountants
Sandhurst House
297 Yorktown Road
Sandhurst
Berkshire
GU47 0QA

This report has been prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small companies.

Approved by order of the board of trustees on 13th December 2021 and signed on its behalf by:



.....
P Rees - Trustee

Report of the Trustees and unaudited financial statements

Independent Examiner's Report to the Trustees of Citizens Advice Waverley

Independent examiner's report to the trustees of Citizens Advice Waverley ('the Company')

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 March 2021.

Responsibilities and basis of report

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

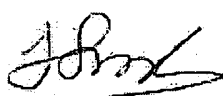
Independent examiner's statement

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body. I can confirm that I am qualified to undertake the examination because I am a registered member of Association of Chartered Certified Accountants which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities (applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



James Brooks FCCA
Association of Chartered Certified Accountants
PFK Accountants Limited
Chartered Certified Accountants
Sandhurst House
297 Yorktown Road
Sandhurst
Berkshire
GU47 0QA

Date: 14th Dec 2021

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Statement of Financial Activities for the Year Ended 31 March 2021

	Notes	Unrestricted funds £	Restricted funds £	2021 Total funds £	2020 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies	3	321,597	-	321,597	313,643
Charitable activities	5	85,272	506,779	592,051	386,265
Investment income	4	3,943	-	3,943	2,886
Total		410,812	506,779	917,591	702,794
EXPENDITURE ON					
Charitable activities	6	379,438	381,707	761,135	628,465
Governance		1,260	-	1,260	1,260
Total		380,688	381,707	762,395	629,725
Net gains/(losses) on investments		-	-	-	(4,400)
NET INCOME		30,124	125,072	155,196	68,669
RECONCILIATION OF FUNDS					
Total funds brought forward		129,129	88,645	217,774	149,105
TOTAL FUNDS CARRIED FORWARD		159,253	213,717	372,970	217,774

The notes form part of these financial statements

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Balance Sheet 31 March 2021

	Notes	Unrestricted funds £	Restricted funds £	2021 Total funds £	2020 Total funds £
FIXED ASSETS					
Tangible assets	12	4,744		4,744	3,232
Investments	13	82,200		82,200	78,716
		<u>86,944</u>		<u>86,944</u>	<u>81,948</u>
CURRENT ASSETS					
Debtors	14	6,040		6,040	12,826
Cash at bank and in hand		169,563	213,717	383,280	223,807
		<u>175,603</u>	<u>213,717</u>	<u>389,320</u>	<u>236,633</u>
CREDITORS					
Amounts falling due within one year	15	(103,294)		(103,294)	(100,807)
NET CURRENT ASSETS		<u>72,309</u>	<u>213,717</u>	<u>286,026</u>	<u>135,826</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>159,253</u>	<u>213,717</u>	<u>372,970</u>	<u>217,774</u>
NET ASSETS		<u>159,253</u>	<u>213,717</u>	<u>372,970</u>	<u>217,774</u>
FUNDS	17				
Unrestricted funds				159,253	129,129
Restricted funds				213,717	88,645
TOTAL FUNDS				<u>372,970</u>	<u>217,774</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 March 2021.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 March 2021 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for

- ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

The notes form part of these financial statements

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Balance Sheet - continued
31 March 2021

These financial statements have been prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

The financial statements were approved by the Board of Trustees and authorised for issue on 13th December 2021 and were signed on its behalf by:

Paul Rees

.....
P Rees - Trustee

The notes form part of these financial statements

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Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements for the Year Ended 31 March 2021

1. SHARE CAPITAL AND MEMBERS' LIABILITY

The charitable company is limited by guarantee and does not have a share capital. In the event of the charitable company being wound up every member, whilst he or she is a member, or within one year after he or she ceases to be a member, undertakes to contribute to the assets of the company such amount as may be required not exceeding one pound.

2. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention, with the exception of investments which are included at market value.

Financial reporting standard 102 - reduced disclosure exemptions

The charitable company has taken advantage of the following disclosure exemptions in preparing these financial statements, as permitted by FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland':

- the requirements of Section 7 Statement of Cash Flows;
- the requirement of paragraph 3.17(d);
- the requirements of paragraphs 11.42, 11.44, 11.45, 11.47, 11.48(a)(iii), 11.48(a)(iv), 11.48(b) and 11.48(c);
- the requirements of paragraphs 12.26, 12.27, 12.29(a), 12.29(b) and 12.29A;
- the requirement of paragraph 33.7.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Short leasehold	- Straight line over 15 years
Fixtures and fittings	- 33% on cost

Taxation

The charity is exempt from corporation tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

2. ACCOUNTING POLICIES - continued

Intangible income

The charity enjoys considerable support of volunteers in all areas of its activities and no monetary value is placed on this benefit in these accounts.

3. DONATIONS AND LEGACIES

	2021 £	2020 £
Donations	36,527	27,723
Grants	285,070	285,920
	<u>321,597</u>	<u>313,643</u>

Grants received, included in the above, are as follows:

	2021 £	2020 £
Waverley Borough Council	210,000	210,000
Farnham Town Council	17,500	17,500
Godalming Town Council	28,000	28,000
Haslemere Town Council	11,520	11,520
Cranleigh Parish Council	10,600	10,600
Parish Councils	7,450	8,300
	<u>285,070</u>	<u>285,920</u>

4. INVESTMENT INCOME

	2021 £	2020 £
Income from investments	<u>3,943</u>	<u>2,886</u>

5. INCOME FROM CHARITABLE ACTIVITIES

	Activity	2021 £	2020 £
Services income	Charitable activities	87,895	53,281
Grants	Charitable activities	504,156	332,984
		<u>592,051</u>	<u>386,265</u>

Grants received, included in the above, are as follows:

	2021 £	2020 £
Parish Councils		550
Restricted Projects	504,156	332,434
	<u>504,156</u>	<u>332,984</u>

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

6. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs (see note 7) £	Totals £
Charitable activities	761,135		761,135
Governance		1,260	1,260
	<u>761,135</u>	<u>1,260</u>	<u>762,395</u>

7. SUPPORT COSTS

	Governance costs £
Governance	<u>1,260</u>

8. NET INCOME/(EXPENDITURE)

Net income/(expenditure) is stated after charging/(crediting):

	2021 £	2020 £
Depreciation - owned assets	<u>3,180</u>	<u>3,549</u>

9. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2021 nor for the year ended 31 March 2020.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2021 nor for the year ended 31 March 2020.

10. STAFF COSTS

	2021 £	2020 £
Wages and salaries	<u>553,528</u>	<u>418,023</u>
	<u>553,528</u>	<u>418,023</u>

The average monthly number of employees during the year was as follows:

	2021	2020
Management and administration	<u>32</u>	<u>19</u>

No employees received emoluments in excess of £60,000.

During the year Citizens Advice Waverley employed 32 paid staff (18.1 FTE). Of these, 9.4 FTE were employed on restricted fund projects. There were no highly paid staff. An analysis is provided below.

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

10. STAFF COSTS - continued

Analysis of salaries:	2021£	2020£
Central staff	51,036	51,036
Office operations	196,927	131,580
Staff cost from unrestricted funds	247,963	182,616
Office operations from restricted funds	306,003	235,641
	553,967	418,257

The charity operates a pension scheme. A contribution towards a pension is made, calculated at 6% of salary, paid from commencement of employment.

11. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted funds £	Restricted funds £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	313,643	-	313,643
Charitable activities			
Charitable activities	41,593	344,672	386,265
Investment income	2,887	(1)	2,886
Total	358,123	344,671	702,794
EXPENDITURE ON			
Charitable activities			
Charitable activities	336,587	291,878	628,465
Governance	1,260	-	1,260
Total	337,847	291,878	629,725
Net gains/(losses) on investments	(4,400)	-	(4,400)
NET INCOME	15,876	52,793	68,669
RECONCILIATION OF FUNDS			
Total funds brought forward	113,253	35,852	149,105
TOTAL FUNDS CARRIED FORWARD	129,129	88,645	217,774

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

12. TANGIBLE FIXED ASSETS

	Short leasehold £	Fixtures and fittings £	Totals £
COST			
At 1 April 2020	51,779	72,869	124,648
Additions	-	4,692	4,692
At 31 March 2021	51,779	77,561	129,340
DEPRECIATION			
At 1 April 2020	51,779	69,637	121,416
Charge for year	-	3,180	3,180
At 31 March 2021	51,779	72,817	124,596
NET BOOK VALUE			
At 31 March 2021	-	4,744	4,744
At 31 March 2020	-	3,232	3,232

13. FIXED ASSET INVESTMENTS

	Unlisted investments £
MARKET VALUE	
At 1 April 2020	78,716
Additions	3,484
At 31 March 2021	82,200
NET BOOK VALUE	
At 31 March 2021	82,200
At 31 March 2020	78,716

There were no investment assets outside the UK.

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

14. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021	2020
	£	£
Trade debtors	(2)	12,826
Prepayments	6,042	
	<u>6,040</u>	<u>12,826</u>

15. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021	2020
	£	£
Other creditors		200
Accrued expenses	103,294	100,607
	<u>103,294</u>	<u>100,807</u>

16. LEASING AGREEMENTS

As at 31 March 2021, the charity had annual commitments under non-cancellable operating leases as follows:

Cranleigh

The office in Village Way, Cranleigh is leased from Cranleigh Parish Council for 30 years from 25 March 2011, rent free. A figure of £10,600, the open market rental value of the premises, is included in premises costs and in Local Authority grants.

Farnham

The lease on the office in South Street, Farnham is currently under negotiation with Waverley Borough Council.

Godalming

The office in Bridge Street, Godalming is leased from Waverley Borough Council and is currently under negotiation.

Haslemere

The office in Well Lane, Haslemere is leased from a private landlord for a term of 5 years from June 2019, for £17,500 per annum.

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

17 MOVEMENT IN FUNDS

	At 1.4.20 £	Net movement in funds £	At 31.3.21 £
Unrestricted funds			
General fund	129,129	30,124	159,253
Restricted funds			
Healthwatch Surrey	836	(801)	35
Surrey Crisis Fund Local Assistance Scheme (LAS)	1,279	46	1,325
District Outreach Project	5,100	-	5,100
Technical Support	14,089	-	14,089
Client Fund Godalming	1,495	92	1,587
Client Fund Haslemere	12,387	(999)	11,388
Help to Claim F2F Set Up	139	250	389
Help to Claim Web/Tel Set Up	673	368	1,041
SWSDA	51,360	79,889	131,249
Client Fund Farnham	1,287	(773)	514
Adviseline Single Queue/HMPT	-	37,740	37,740
Money and Pensions Service (MaPs)	-	1,900	1,900
BEIS Remote Working & Soft Phones	-	7,360	7,360
	<u>88,645</u>	<u>125,072</u>	<u>213,717</u>
TOTAL FUNDS	<u>217,774</u>	<u>155,196</u>	<u>372,970</u>

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	410,812	(380,688)	30,124
Restricted funds			
Healthwatch Surrey	9,294	(10,095)	(801)
Surrey Crisis Fund Local Assistance Scheme (LAS)	2,546	(2,500)	46
Client Fund Godalming	250	(158)	92
Client Fund Haslemere	1,390	(2,389)	(999)
Help to Claim F2F Set Up	33,750	(33,500)	250
Help to Claim Web/Tel Set Up	50,008	(49,640)	368
SWSDA	337,327	(257,438)	79,889
Client Fund Farnham	647	(1,420)	(773)
Adviseline Single Queue/HMPT	43,000	(5,260)	37,740
Money and Pensions Service (MaPs)	16,827	(14,927)	1,900
BEIS Remote Working & Soft Phones	11,740	(4,380)	7,360
	<u>506,779</u>	<u>(381,707)</u>	<u>125,072</u>
TOTAL FUNDS	<u>917,591</u>	<u>(762,395)</u>	<u>155,196</u>

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

17. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1.4.19 £	Net movement in funds £	At 31.3.20 £
Unrestricted funds			
General fund	113,253	15,876	129,129
Restricted funds			
Healthwatch Surrey	-	836	836
Surrey Crisis Fund Local Assistance Scheme (LAS)	4,617	(3,338)	1,279
District Outreach Project	6,600	(1,500)	5,100
Technical Support	14,089	-	14,089
Client Fund Godalming	1,383	112	1,495
Client Fund Haslemere	13,677	(1,290)	12,387
Help to Claim F2F Set Up	-	139	139
Help to Claim Web/Tel Set Up	-	673	673
SWSDA	(4,514)	55,874	51,360
Client Fund Farnham	-	1,287	1,287
	<u>35,852</u>	<u>52,793</u>	<u>88,645</u>
TOTAL FUNDS	<u>149,105</u>	<u>68,669</u>	<u>217,774</u>

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Gains and losses £	Movement in funds £
Unrestricted funds				
General fund	358,123	(337,847)	(4,400)	15,876
Restricted funds				
Healthwatch Surrey	9,294	(8,458)	-	836
Surrey Crisis Fund Local Assistance Scheme (LAS)	4,162	(7,500)	-	(3,338)
District Outreach Project	-	(1,500)	-	(1,500)
Client Fund Godalming	785	(673)	-	112
Client Fund Haslemere	-	(1,290)	-	(1,290)
Help to Claim F2F Set Up	28,445	(28,306)	-	139
Help to Claim Web/Tel Set Up	48,499	(47,826)	-	673
SWSDA	251,823	(195,949)	-	55,874
Client Fund Farnham	1,663	(376)	-	1,287
	<u>344,671</u>	<u>(291,878)</u>	<u>-</u>	<u>52,793</u>
TOTAL FUNDS	<u>702,794</u>	<u>(629,725)</u>	<u>(4,400)</u>	<u>68,669</u>

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Notes to the Financial Statements - continued for the Year Ended 31 March 2021

18. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2021.

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Detailed Statement of Financial Activities for the Year Ended 31 March 2021

	2021 £	2020 £
INCOME AND ENDOWMENTS		
Donations and legacies		
Donations	36,527	27,723
Grants	285,070	285,920
	<u>321,597</u>	<u>313,643</u>
Investment income		
Income from investments	3,943	2,886
Charitable activities		
Services income	87,895	53,281
Grants	504,156	332,984
	<u>592,051</u>	<u>386,265</u>
Total incoming resources	917,591	702,794
EXPENDITURE		
Charitable activities		
Wages	553,528	418,023
Premises costs	115,696	103,688
Telephone, postage and website	10,018	6,589
Sundries	7,739	9,224
Travel	5,573	21,957
Recruitment and training	6,054	16,254
Office running costs	59,347	46,625
No description		2,556
Long leasehold		1,747
Fixtures and fittings	3,180	1,802
	<u>761,135</u>	<u>628,465</u>
Support costs		
Governance costs		
Accountancy and legal fees	1,260	1,260
Total resources expended	762,395	629,725
Net income before gains and losses	155,196	73,069
Realised recognised gains and losses		
Carried forward	153,936	71,809

This page does not form part of the statutory financial statements

Report of the Trustees and unaudited financial statements

Citizens Advice Waverley

Detailed Statement of Financial Activities for the Year Ended 31 March 2021

	2021 £	2020 £
Realised recognised gains and losses		
Brought forward	153,936	71,809
Realised gains/(losses) on fixed asset investments	-	(4,400)
Net income	<u>155,196</u>	<u>68,669</u>

This page does not form part of the statutory financial statements



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REGISTERED COMPANY NUMBER: 04823693 (England and Wales)