

Annual Report

2023-24

60 Years & Counting... Here to Help

advice
— space

support & guidance

A message from our Chair



It is with great pride that I present this year's Annual Report for Advice Space. As Chair, I have the privilege of overseeing an organization dedicated to providing free, impartial, and confidential advice to those who need it most. This year's report not only highlights the milestones we have achieved but also serves as a testament to the resilience, compassion, and dedication of our staff, volunteers, and partners.

Over the past year, we have faced unprecedented challenges, from ongoing economic uncertainty to the evolving needs of our community.

Despite these obstacles, Advice Space Belfast has remained steadfast in its commitment to empowering individuals and families. We have expanded our services, embraced innovation, and strengthened our partnerships, ensuring that we continue to meet the complex and diverse demands of those we serve.

Our team has provided guidance on critical issues such as debt management, housing, employment rights, and access to benefits. Each interaction has reaffirmed the importance of our mission: to provide people with the knowledge and support they need to make informed decisions and navigate difficult circumstances. Behind every statistic in this report is a story of hope and resilience—a reminder of the profound impact our work has on the lives of so many.

I would like to extend my heartfelt thanks to our incredible team of advisors, administrative staff, and volunteers whose unwavering dedication makes our work possible. Your professionalism and compassion are the bedrock of Advice Space. To our funders and partners, your support and collaboration have been invaluable in helping us fulfil our mission.

Finally, to the people we serve: thank you for trusting us to stand alongside you during difficult times. Your courage and determination inspire us to keep pushing boundaries and finding new ways to support our community.

Thank you for being part of this journey.

A handwritten signature in black ink that reads "Andrew McCartan". The script is fluid and cursive, with a large, stylized 'A' and 'M'.

Andrew McCartan, Chairperson

A message from our CEO

Over 60 years ago in August 1964 a small group of concerned people came together to establish a charity dedicated to **“the advancement of education, the protection and preservation of health and relief of poverty, sickness and distress in N.I.”** This first became known as Citizens Advice Bureau with last changing name in 2018 to **Advice Space** yet remains the main objective of Advice Space to this day.

I joined Advice Space around 18 months ago in July 2023 and have had a busy and rewarding time working with our funders, partners, Trustee Board, staff and volunteer teams and witnessing first hand the positive impact that the work of Advice Space has upon the lives of the people we help .



The 2022/23 NI Poverty and Income Inequality report published by DfC on 27th March 2024 (the end of our 2023/24 reporting year) presents an analysis of the levels of poverty and income inequality in NI. It highlights that in that year there were 18% of individuals, 24% of children (up from 19% in 2021), 17% of work-age adults, and 16% of pensioners in relative poverty*.

It is widely recognised the important role that advice services play in the provision of high-quality independent welfare rights information and advice in helping to break down the cycle of poverty and disadvantage. Northern Ireland is the poorest region in the UK and now one of the poorest in Europe according to a Joseph Rowntree Foundation report on poverty in Northern Ireland (2022).

A person's need to have even the minimum level of basic income and the ability to manage their finances is intrinsic to their sense of well-being. Good quality independent advice can help empower and protect people against the worst excesses of poverty; it can help enable social justice by providing a more stable foundation from which people can gain access to appropriate health services, secure accommodation, be educated, gain employment, sustain family and have social networks. Social exclusion and marginalisation is then less likely.

Advice Space has spent a lot of valuable and dedicated time during Oct23-Mar24 consulting, developing and agreeing a new 5-year Strategic Plan (Apr24-Mar29). In this time ahead, I, along with the Advice Space team, pledge to continue, within the context of an ever-constrained funding environment, to work harder to help deliver on our mission to help realise our vision so that all people in Northern Ireland are able to exercise their rights and obtain fair treatment under the law.

*An individual is considered to be in relative poverty by definition if living in a household with an equivalised income below 60% of the UK median income in that year. That threshold, for example, for individuals is £250 and for a couple with no children £373.

A handwritten signature in black ink that reads "Peter McMahon". The script is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Peter McMahon, CEO

Our Team

This year, as we celebrate 60 years of our journey, we celebrate the contributions of all those who have been a part of our story, and in particular, our staff and volunteer teams across Advice Space.



📍 Cutter's Wharf, Stranmillis

June 2024 - Staff & Volunteer Recognition Event

Our Team



📍 Belfast City Hall

19th August 2024 - Celebrating our 60th Anniversary Date

Our Partners



NI Chest Heart and Stroke (NICHHS)

The implementation of a fast-track referral pathway between NICHHS and Advice Space has proven transformative for our service users.

This streamlined approach not only reduces wait times but also empowers our service users to access the support they ultimately need, improving their financial well-being and overall quality of life. This timely assistance allows greater independence and resilience for those with Chest, Heart or Stroke conditions.



Cystic Fibrosis (CF) Trust

As a CF social worker based in RBHSC, my role is to support children with CF and their families, and this includes support with financial issues. Therefore, I have referred parents to Sarah in Advice Space. This has been for DLA/PIP applications and/or mandatory reconsideration, and financial advice specific to a family's needs.

Financial matters can typically be a significant additional stressor for families dealing with CF. Sarah's input has helped manage, and many times alleviate this stress. I have found Sarah invaluable, and I know from conversations with parents they have too. Sarah is responsive and has extensive expertise and knowledge that has resulted in positive outcomes for the families I refer.

— Karen Eagleson, Hospital Social Worker

The CF Advice Space project is such an important element of the overall service provision of care for children and families who have been plunged into crisis following diagnosis. This crisis is an enduring process due to the continuing burden of care throughout childhood and transitioning to adult services. Sarah ensures our patients receive accurate expert advice about their benefit entitlements and following comprehensive financial assessments. Her knowledge, expertise and professional standards are unprecedented. Sarah is integral to the entire social work hospital service on a number of levels. Sarah has been successful in challenging DFC and DWP decisions for families who have been adversely financially impacted by decision makers as these have a ubiquitous impact on all aspect of family life.

— David Reynolds, Hospital Social Worker

Cystic fibrosis(CF) is a life-long condition that impacts all aspects of life. The service provided by Advice Space ensures that people in NI affected by CF can access expert welfare and benefits advice on a range of issues tailored to their individual circumstances, including but not limited to housing, employment, Universal Credit and Personal Independence Payment (PIP). The Advice Service generates significant benefits income for our beneficiaries, helping lessen the considerable financial burden of CF and supporting those with the condition and their caregivers to live their lives as fully as possible.

Our Partners



Macmillan Cancer Support

The specially trained Macmillan Advisers ensure people don't waste time completing forms that aren't relevant and they help them avoid mistakes so their applications are processed quickly and achieve the best results.

When people affected by cancer receive help early they are better able to access the right support and manage the financial impact of cancer, and they are less likely to fall into financial hardship.

The income generated because of the Macmillan Welfare Benefits service enables people affected by cancer to afford necessities and additional items that are required as a result of a cancer diagnosis. The extra income can also help to lessen the impact of a loss of earnings and provide a safety net, allowing time to arrange other sources of finance.

Face-to-face support is also provided and is essential for those who do not have the ability to apply for benefits online or have language, disability or health barriers that stop them from being able to talk on the phone. The Macmillan Welfare Benefits service at Advice Space continues to make a positive impact for people affected by cancer in 2024 and we are so proud to continue supporting this service.

— Jane Hughes, Partnership Manager NI



Belfast Health and
Social Care Trust

Belfast H&SC Trust - Sensory Advice Service

Advice Space provides an outstanding service. Their staff are incredibly approachable and always willing to help. We've consistently heard glowing feedback from our service users, who speak very highly of the support they have received. Keep up the excellent work!

— Aidan Best, Senior Social Work Practitioner (BHSCT Sensory Support Team)

Our Impact

Advice Space in Numbers

This year, **Advice Space** have...

Directly helped

26,160

people



Clawed back

£9.8m

in back payments and
unclaimed benefits

Dealt with

90,166

different issues



Generated over

£1.1m

income to deliver our services

Our Impact

Social Media

Advice Space currently have

968

followers across

3 social platforms



Facebook



LinkedIn



Instagram

Our **Facebook** content received

5270 views

Our **LinkedIn** content was seen by

3753 people

Our **Instagram** interactions increased by

100%

and our content gained

1233 views

Our Clients

Macmillan Welfare Benefits Service

Client is female, aged 46 and has been diagnosed with bowel cancer and had self-referred after seeing our leaflet. She had been working part time and in receipt of Universal Credit (UC) but is now off work due to her illness. She also had childcare costs and was unsure of when she would go back to work.

Our Adviser assisted her regarding UC Regulations around childcare costs that will stop when her Statutory Sick Pay (SSP) from her employer stops - this may be also be an issue for many parents recovering from cancer as they could lose their childcare provider. Our Adviser explained that when her SSP stopped she could have the additional element of LCWRA. This is for a group within Universal Credit for people who have a reduced ability to work whom receive an additional payment on top of their standard Universal Credit allowance.

Advice Space advised applying for Personal Independence Payment (PIP) and help with Health Care costs (HC1 form) and it was explained she could also recover some hospital travel costs. In addition she was also able to get a Macmillan Grant of £200 following an application.

She was awarded £184.30 per week which alleviated some financial worries and our Adviser helped her with her HC1 form also so she could recover her hospital travel costs and then also applied for a Blue Badge online for her to assist with parking and accessibility issues in this regard.



Just to let you know I've been awarded high-rate PIP. Thank you so much for all your help, I wouldn't know where to have started.

Quote from Client



BHSCT Physical Disability Service

Client was referred to the Physical Disability project by her Social Worker for a full benefit check. She suffers with recurrent arthritis, osteoporosis, a functional neurological disorder, COPD, Ankylosing spondylitis, psoriasis and previous TIAs (mini strokes) causing left sided weakness. She often feels vulnerable and overwhelmed dealing with benefit issues due to her mental health and the neurological condition so was reassured we would support in any way possible. Client also has severe mobility issues but did not have a Blue Badge in place.

Our Adviser completed a Blue Badge application over the phone with her and secured a statement of entitlement from PIP to support her application and this was subsequently awarded. She received a PIP review form shortly after our initial contact and the Adviser supported her with filling in the form, including accommodating an in-person appointment at her nearest office due to difficulty using the phone and sent it in with relevant evidence. The Adviser also detailed her difficulty using the phone on the form as she was stressed at the prospect of having an assessment and has previously found this difficult. Client was awarded £184.30 a week and following a paper-based assessment we requested and she was very delighted and relieved at this.

She later called back our advice service as she had received a means testing form from NIHE for a Disabled Facilities Grant as her home needed adaptations recommended by an OT and got support to complete this. As a result, she has been able to access the Disabled Facilities grant and avoid paying any upfront costs for home adaptations. Great successes all round for our client!

Our Clients

Welfare Reform 1

Client had to come out of work after receiving treatment for kidney dialysis hence was managing on savings. Adviser applied for contribution-based ESA as his wife was working. They are homeowners and not eligible for UC but with the husband getting dialysis his Adviser also applied for PIP and in turn he received the enhanced rate care and standard mobility.

Unfortunately circumstances changed again as his wife was then diagnosed with breast cancer, and they decided not to challenge the decision of the standard rate mobility he had just been awarded as this was too much stress at this time. So, the Adviser worked with them and applied for contribution-based ESA for his wife and then PIP which she too received. After 6-7 months they returned and wanted to do a supersession review of his PIP award which the Adviser helped do as by this stage the husband had had a kidney transplant but it had failed and left him with other autoimmune diseases and back on dialysis and he was very unwell. The decision was then changed and he received the high-rate. Both clients were very grateful for our help, support and guidance.

Welfare Reform 2

Client was a 50 year old man who was now unable to work due to health issues arising and was living with his parents – he had made contact as he was struggling without any income or benefits.

Our Adviser completed a claim for UC and which was awarded and also went ahead and made an application for PIP which was also awarded (ERC ERM rates). The client advised us of the outcomes keeping in contact along the way and was very happy with these outcomes and is now better off as a result of the advice and applications!

Welfare Reform 3

Client is a Syrian refugee, married with three children. His eldest son has severe autism and was getting DLA (HRC & LRM). This son requires frequent physical restraint from his father, so a supersession of his DLA was sought. The adviser helped with the application, mandatory reconsideration and appeal stages. The appeal tribunal awarded client's son DLA (HRC & HRM) back-dated to 2016. As a result the client was advised to claim vehicle tax exemption (back-dated) which has been successful.

Client's wife meanwhile was helped to claim PIP and received a PIP award of SRDL back-dated until 2020 which has resulted in a back-payment of disability premium in Income Support of £10,500 being paid to the family. Client has also been helped to claim a back-dated payment of Severely Disabled Child component in his Child Tax Credit. This also was taken to appeal by the client with help from Welfare Reform Adviser, but the appeal was disallowed. The case has been now referred to the Law Centre to consider potential for post-appeal proceedings to the social security commissioners.

Our Policy Work

Sarah Wright on our Policy Work

Trends captured from our client data, experiences and enquiries are captured as taking these forward with a good evidence base can in turn lead to positive change in policy, practice or even in legislation. Here is a flavour of some recent happenings in our policy work from Sarah Wright, one of our Advisers with a keen interest in policy work:

In 2024 Sarah raised and resolved social policy issues in relation to:

UC Trusted Partner escalation routes; UC Contingency Fund Grant messaging on NI Direct; removal of unnecessary sickline requests for legacy ESA claimants migrating to UC; UC85 assessment reports access for clients; UC and PIP claim suspensions due to Biometric Residence Permit renewals; Adviser Discretion Fund [ADF] for Childcare Costs for clients migrating to UC; data on processing time for UC ADF; amendments to ESA/UC Work Capability Assessment decision letters to include length of award and review date; reasonable adjustments for accepting UC claimant commitments; UC maladministration complaints; UC GDPR breaches; Work Capability Assessment claim extensions during move from Atos/Medical Support Services to Capita, and seeking data on Industrial Injury Disablement Benefit for those who contracted COVID as employees.

Sarah also raised social policy issues in relation to:

Capita reports being sent to clients automatically [as per Ombudsman's request]; review of the opt-in process for Capita assessment recording; amendments to NI Direct regarding moving to NI/GB/Scotland and impact on benefits; DfC sharing immigration and residence evidence between departments; proposed PIP Trusted Partner mechanism; automatic entitlement to Help with Health Costs for UC claimants; UC communications to clients via journal at nights/early hours; UC overpaying Transitional Element for migration cases; UC claim closure during window for Mandatory Reconsiderations; issues migrating children from DLA to PIP; appointeeship for children moving from DLA to PIP & lack of data on children moving from DLA to PIP; UC Regulations Schedule 8 & 9; PIP claim disallowances for non-return of PIP2 form; digital PIP2 versus paper PIP2 outcomes; UC Rate Rebate delays, and suspensions versus sanctions.

An example based on the experiences of Carers in NI

A pattern was identified whereby multiple clients who had received Carers Allowance didn't receive the UC Carer Element in their claims and so this was raised directly with UC in Northern Ireland who then investigated the issue and found not only was this an issue here but also for UC claimants across the UK.

A mass administrative exercise then followed to rectify and backdate all of these related claims. Sarah also sought clarification and training for UC staff themselves working in the Department so as to ensure that the Carer Element is backdated to the beginning of their qualifying benefit award [PIP/DLA] or to the beginning of their UC claim. A tremendous outcome that changed practice as a result of identifying a common issue from our clients' experiences.

Our People

This year, Advice Space welcomed a new trustee and trainees to become part of our **dedicated team**.

New Trustee

Peter Grimley



Peter has over 20 years of experience in ICT across the private and public sectors, specialising in digital transformation, strategic leadership, and delivering impactful technology solutions. Throughout his career, Peter has had the opportunity to lead complex projects, manage diverse teams, and drive meaningful change in organisations.

Peter has recently joined the Advice Space team as a new Trustee following interview and induction stages and is motivated by a desire to give back to the local community. This role allows Peter to combine his professional expertise with his commitment to supporting the voluntary sector.

Peter is passionate about the potential of technology to improve lives and outcomes for people and comments:

“

I am excited to help Advice Space adapt to the ever-changing digital landscape. It's a privilege to be given the opportunity to work alongside the talented and dedicated Advice Space team.

”

Our People

Steven Forbes



As a trainee generalist Adviser, I've spent the past few months learning about the social security system in the UK, along with the other areas of advice that Advice Space offers our clients. I'm looking forward to completing my training and supporting our clients in any way I can moving forward.

Nickki Heptonstall



I have been training to be a generalist Adviser at Advice Space for the last 3 months having been a volunteer with Advice Space previously. I'm currently completing my initial adviser certification which is an OCN Level 3 Certificate of Generalist Advice (2024). I'm learning so much about the many different areas we advise on. I'm really enjoying working with the team at Duncairn Gardens office and beyond; they are a great set of people and I'm looking forward to becoming a "real Adviser" very soon!

Ewan Nixon



Training with Advice Space and progressing towards the role of an Adviser has been eye-opening for me in understanding client needs, providing support and understanding the challenges in creating effective social policy. It's been a great experience and has shown me the importance of advice services in our communities. I'm looking forward to finishing my training and taking on the role of a qualified Adviser.

Annual Accounts

Advice Space - Company Limited by Guarantee Statement of Financial Activities (including income and expenditure account) Year ended 31 March 2024

	Note	Unrestricted funds £	2024 Restricted funds £	Total funds £	2023 Total funds £
Income and endowments					
Donations and legacies	5	798	—	798	370
Charitable activities	6	65,194	1,038,106	1,103,300	1,073,191
Other trading activities	7	6,000	—	6,000	6,000
Investment income	8	1,198	—	1,198	1,259
Total income		73,190	1,038,106	1,111,296	1,080,820
Expenditure					
Expenditure on charitable activities	9	114,097	1,038,106	1,152,203	1,015,924
Total expenditure		114,097	1,038,106	1,152,203	1,015,924
Net (expenditure)/income and net movement in funds		(40,907)	—	(40,907)	64,896
Reconciliation of funds					
Total funds brought forward		649,353	24,530	673,883	608,987
Total funds carried forward		608,446	24,530	632,976	673,883

The statement of financial activities includes all gains and losses recognised in the year.
All income and expenditure derive from continuing activities.

Advice Space - Company Limited by Guarantee Statement of Financial Position 31 March 2024

	Note	2024 £	2023 £
Fixed assets			
Tangible fixed assets	15	73,338	81,262
Current assets			
Debtors	16	94,753	66,633
Cash at bank and in hand		521,125	570,310
		615,878	636,943
Creditors: amounts falling due within one year	17	(56,240)	(44,322)
Net current assets		559,638	592,621
Total assets less current liabilities		632,976	673,883
Net assets		632,976	673,833
Funds of the charity			
Restricted funds		24,530	24,530
Unrestricted funds		608,446	649,353
Total charity funds	19	632,976	673,883

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

These financial statements were approved by the board of trustees and authorised for issue on 15 October 2024, and are signed on behalf of the board by:

C Trotter
Trustee

P McCartan
Trustee



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