



Exeter Citizens Advice Bureau

Whoever you are, whatever your problem

Strategic Plan

1st April 2014 – 31st March 2019

(Approved by trustees on 26 March 2014)

BACKGROUND

1. What is the purpose of this document?

This strategy has been developed to provide a summary for our workforce; and external partners and stakeholders about the future overall direction of our work over the next five years, commencing 1 April 2014. It is not intended to be a detailed document with information about precise measurement of outputs or outcomes, as these will be developed as part of the next phase of work to develop a full Business and Development Plan (incorporating a fundraising strategy) for the charity.

2. How was it developed?

The strategy was developed as a result of reviewing progress against our current strategic plan and a workforce Strategy Planning day held on the 29th January 2014. The strategy will be reviewed by the bureau workforce and trustees in February 2014, before being shared with external stakeholders in March 2014.

The final version of the strategy was approved by trustees on 26th March 2014.

OUTLINE STRATEGY

3. What is our overall purpose and aim?

Exeter Citizens Advice Bureau aims:

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives

Exeter Citizens Advice Bureau provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

4. How do we work?

In addition to fully supporting the general aims of the CAB service, Exeter CAB adopts the following principles in its work:

- Exeter CAB is a client-focussed organisation
- A client will be given as much time as he or she needs, but it is recognised that this may not be as much time as he or she wants
- Services will be targeted towards those who are most in need through the effects of social exclusion
- The quality of services offered to clients must remain demonstrably high
- The financial and structural viability of the organisation shall first be considered before any new services are introduced
- It is recognised that new services and initiatives should be directed primarily at strengthening the core of the service, either structurally or financially

5. How are we resourced?

Exeter Citizens Advice Bureau currently operates from Exeter City Council-owned office premises, held on a ten year lease with three years remaining. Exeter City Council currently provides a full rent grant and rate relief to cover the cost of the premises. In addition, core grants are currently provided by Exeter City Council and Devon County Council (via CAB Devon) to contribute to the cost of delivering the main Bureau, volunteer-led, service. This income is supplemented through contract and project fees, currently provided through the Exeter Money Advice Partnership, Devon Welfare Rights Unit (part of Citizens Advice), Big Lottery Fund Reaching Communities and Advice Services Transition Fund programmes, FORCE Cancer Charity, Exeter and District Branch of the MS Society, Exeter Board, Exeter & District Kidney Patients' Association and Exeter Leukaemia Fund. Exeter

Citizens Advice Bureau receives no regular central government funding.

In addition, our volunteers give their time to help our clients through advice-giving and assistance with self help information, as well as contributing to the administration of the Bureau. We also have a team of financial capability volunteers who provide training to front line workers and end users. In 2012/13, our volunteers provided an estimated 18,928 hours of time, or equivalent to 10.4 full-time staff members, or some £276,137 in value.

The Bureau is developing other funding streams with the aim of securing the long term financial stability of the organisation. Initiatives include our trading enterprise, increased business support and funding, and Friends of Exeter CAB Group.

6. Who do we work with to achieve our aims?

Exeter Citizens Advice Bureau is an independent charitable company working with a wide range of partners including local people, local community groups and organisations, voluntary sector bodies, public sector bodies, statutory agencies, business and local partnership bodies (for example; Exeter Chamber of Commerce, Advice Exeter and Devon Advice Network).

7. The external environment

No strategy would be complete without an assessment of the external environment and factors that impact upon the delivery of the strategy.

The external environment is ever more challenging with the next Comprehensive Spending Review likely to see further public sector cuts over the term of this strategic plan. Such cuts deliver twin challenges. Firstly in terms of the local authority grants and lottery funding, available to the advice sector. And secondly, such deep cuts will increase the need for frontline services provided by the voluntary sector at a time of public sector service reductions.

Equally, current and future planned welfare reforms mean that we must be vigilant in ensuring that those people already at the margins of society in greatest need of help and assistance are not marginalised further.

We must also recognise that our own workforce face many of the same challenges that our clients face in terms of the increased cost of living, family issues, and employment. Therefore, we must ensure that we offer flexible volunteering opportunities that fit with modern life, and also that our paid staff are remunerated in line with the Living Wage.

8. What are our overall strategic priorities for the future?

We will seek to achieve our purpose and aims through focusing on the following six strategic priorities:

1. **Change:** manage change to maintain a culture of continuous improvement and development
2. **Resources:** achieve long term sustainability through best use of financial, and other, resources
3. **Impact:** tell people who we are and what we do
4. **Services:** develop new adaptable models of service delivery that empower clients and promote self-sufficiency, including working in partnership with other organisations
5. **People:** Ensure we have enough trained and flexible people in our team
6. **Policy:** pro-actively identify trends, and use the evidence of our clients to influence policy and prevent injustice

9. What detailed actions will we undertake?

The appendix sets out some of the more detailed actions we will undertake to achieve these priorities. These will be used to inform our next Business and Development Plan.

Appendix

What specific measures will be introduced to achieve these priorities?

Change: manage change to maintain a culture of continuous improvement and development
Maintain high quality service standards, including Citizens Advice quality standards and Advice Quality Standard, across all Bureau services and projects
Ensure that the charity governance arrangements are fit for purpose in the context of changes in charity law
Consider the environmental impact of our work and reduce our carbon footprint and energy use
Ensure that we have capacity to manage change across the charity, including premises use, IT and client management systems, staffing, communications, working practices and financial systems
Communicate the need for change internally so that all of the bureau workforce understand the impact and need for change
Investigate an 'intranet' or similar tool to improve internal communications with all bureau workers

Resources: achieve long term sustainability through best use of financial, and other, resources
Ensure that we operate from premises that are modern and meet the needs of both clients and our workforce
Consider participating in the emerging Citizens Advice Money Advice Strategy
Increase the range and diversity of funders supporting Exeter CAB to further reduce dependence and risks
Review and relaunch our trading company to raise un-restricted income
Review and relaunch our Friends Group
Continue to use a full cost recovery model for costing projects/contracts
Seek a minimum of three year funding agreements
Investigate schemes for seeking client donations that are appropriate and mindful of a clients current financial situation

Impact: tell people who we are and what we do
Develop a programme of presentations to local partners and stakeholders and continue to exploit networking opportunities across the City and wider area
Further improve systems for evaluating the outcome of our advice services, projects and contracts using the Citizens Advice outcomes toolkit
Continue to develop the Bureau website
Deliver our Communication and Marketing Workplan to raise the profile of the Bureau with the local community, partners and stakeholders
Continue to produce our quarterly newsletter to raise our profile and mark our achievements
Review our external communications to ensure that it is clear that we are a charity and to ensure that people know who we are and what we do.
Promote the service to local businesses and attract more Corporate supporters
Promote the CAB brand in line with national Citizens Advice developments and initiatives

Services: develop new adaptable models of service delivery that empower clients and promote self-sufficiency, including working in partnership with other organisations
Manage and develop advice services so that they are available in a range of community languages and BSL
Deliver a programme of volunteer-led financial capability education and training for the local community
Continue to deliver the debt literacy partnership with University of Exeter School of Law, in secondary schools
Continue to improve client health and quality of life through provision of, for example, <ul style="list-style-type: none"> ▪ Open Door and telephone advice services, ▪ Self help resources ▪ Exeter Money Advice Partnership contract, ▪ More Brighter Futures project ▪ FORCE Project ▪ MS Society project ▪ Exeter Leukaemia Fund project ▪ Exeter & District Kidney Patients' project ▪ Advice Exeter project

<ul style="list-style-type: none"> ▪ Quids for Kids project ▪ Working Age Carers project ▪ Healthwatch project
We will investigate the potential for wider use of IT technologies to support our advice and information giving, i.e. email, social networking, text messaging
Develop more advice projects to target socially excluded groups and people, particularly BME communities and disabled people
Develop plans to deliver advice tailored to the individual needs and wants of clients, particularly the most vulnerable and those in greatest need
Review the efficiency and effectiveness of how we deliver services; such as email, home visits, appointments, or website. Recognise the impact of an increasing ageing population on our work
Collaborate with CAB Devon to meet the advice and information needs of those in greatest need
Working with others, deliver the Exeter Money Advice Partnership service
Work with partners, including CAB Devon and Advice Exeter, to develop new, or complementary, services for the local community
Empower other local organisations to deliver 'triggers and clues' diagnostic assessments for their own clients
Promote client self-sufficiency by providing resources and educational tools that empower clients to resolve their problems themselves, or take action earlier
Offer more diverse opening times and consider how other partners can use our premises to deliver complementary services to our client base, whilst maintaining our own services

People: Ensure we have enough trained and flexible people in our team
Recruit and retain additional volunteers to meet the needs of our clients
Ensure that our volunteer base, including trustees, is diverse and representative of the local community
Working with local minority community groups, recruit more volunteers
Develop plans to offer a wider range of roles and opportunities for volunteers and to use their existing skills and experience and recruit our workforce from a broad spectrum of the local community
Improve facilities and working practices for the benefit of our workforce
Offer short-term volunteering opportunities that are meaningful and meet the needs of both clients and volunteers
Increase role flexibility amongst our workforce so that we can better respond to short-term changes in volunteer numbers
Develop volunteering opportunities to assist with peer support, mentoring and supervision

Ensure that workforce IT skills are fit for purpose and, where necessary, develop an IT improvement plan

Policy: pro-actively identify trends, and use the evidence of our clients to influence policy and prevent injustice

Continue to take a consistent approach to social policy evidence gathering across our services and projects

Continue to improve client health and quality of life through local, regional and national social policy action

Recruit additional volunteers to meet our social policy and campaigning goals.

Be pro-active in identifying emerging trends and respond to proposals before they are implemented

Use our client stories to highlight the real impact of policy and practice