

**Citizens Advice South Somerset
Strategic Business Development Plan
2021 - 2024**

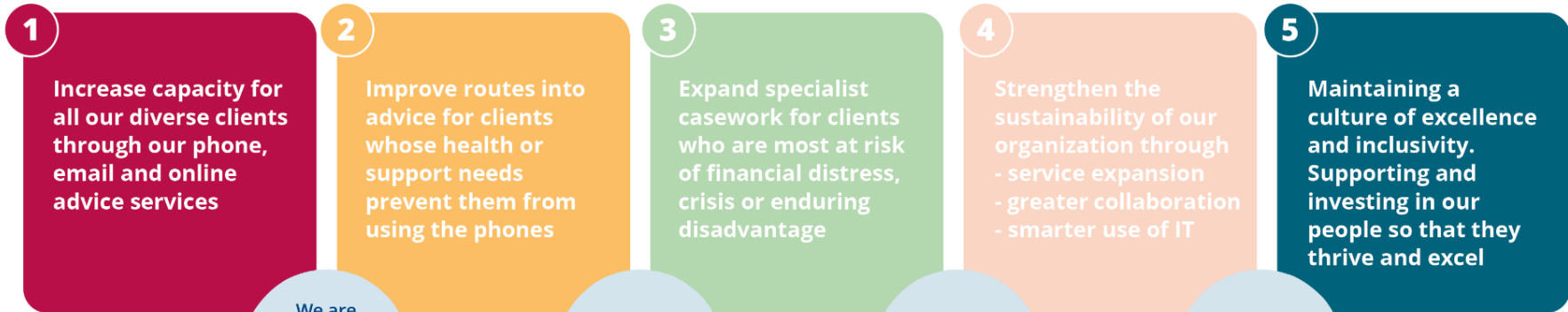


Strategic Business & Development Plan

What we do - Enable people to plan for, and manage through, key life events and change



OUR 5 STRATEGIC OBJECTIVES



Pillars of Service



BENEFITS TO CLIENTS



Introduction and Executive Summary

This Business Plan takes CASS through to 2024 and sets out the organisation's approach to developing a responsive and sustainable service that meets our communities' current and future needs.

2020 was largely defined by our response to the Covid 19 pandemic, a year where many of our strategic investments (IT and remote working capability) proved their worth. Throughout the challenges of the last year we continued to focus on our objectives and our clients - helping record numbers of local people with their advice needs. Looking ahead we are planning for increased demand for advice and significant changes to our funding due to local government reform and the recommissioning of Debt Advice and Universal Credit Help To Claim services.

Our 5 strategic objectives will ensure that we remain focused on maintaining our adaptiveness within what we expect to be a very challenging economic environment. In order to remain relevant and successful we must be open to new ways of working and consistent in delivering to high standards (productivity levels, output specifications and outcomes).

Although the reform of local government has yet to be decided it has prompted a much greater degree of collaboration among the Somerset advice agencies. Plans for a joint agreement on a "universal core service offer" and standard operating procedures are underway which will build upon the success of the Somerset Adviceline initiative set up in response to Covid during 2020.

At a national level Citizens Advice are developing new opportunities for co-delivery among network members with the aim of increasing service capacity across the network. Achieving greater efficiency and increasing advice capacity is a key driver of the National Citizens Advice plan for 2022.

Strategic Priorities

Over the next 3 years we aim to maintain our specialisms and pursue opportunities for new partnerships and delivery arrangements. As ever we remain focused on tackling local priorities and meeting the changing needs of all our diverse clients.

Four Cross-Cutting Development Themes

- 1) Continued emphasis on the use of IT across all aspects of the organisation's work
- 2) Adopting an enterprising approach in order to retain existing services and respond to new opportunities
- 3) Commitment to continuous improvement and client-centred practice
- 4) Increased focus on joint working and collaboration (including shared back-office and service delivery partnerships)

These four themes are reflected in each of the objectives within this plan.

Statement Of Purpose

Our Vision

Everyone has somewhere trusted to turn to for help and advice

Mission

Delivering excellence in prevention and advice services. We will provide high quality, seamless and responsive services that meet our clients' needs enabling them to act early to avoid a problem escalating or to address the issues that negatively affect their lives.

Aims

Helping clients prepare for, and manage through, key life events and change

Aspiration

We are a service that is recognized locally and nationally for its impact, quality and contribution to addressing inequality and disadvantage

Outcome Framework

As a result of using our services clients will benefit from:

Greater Independence

- clients gain knowledge and a better understanding of their rights and responsibilities
- clients are more able to move forward and address their issues
- clients are better prepared to take action themselves to avoid issues arising in the future

Better Prospects

- clients learn key life skills (to budget, problem solve, plan and manage their personal affairs)
- clients become more familiar with the safe use of online help and information resources
- clients are better informed and more able to make and manage welfare claims

Improved Wellbeing

- clients benefit from reduced risks of crisis or harm (eviction, debt, homelessness, abuse)
- clients benefit from reduced anxiety
- clients benefit from improved circumstances

Values

We are a person-centred organization that is responsive to the needs of our clients, staff and partners. We are committed to working in a way that promotes respect, dignity and equality for all.

Our aims and principles are aligned to our membership of the National Citizens Advice network.

The over-arching principles of Citizens Advice South Somerset are to:

1. Provide the advice and support people need to find their way forward – whoever they are and whatever their problem
2. Campaign for change in government policy or industry practices where they make life harder for people
3. Value and champion diversity, inclusion and equality and challenge discrimination and inequality

Services Offered

Clients will be offered self-help resources, prevention, advice and casework support. These services will be delivered across a range of channels matching clients' needs and circumstances within the resources available (face to face, phone, email, webchat). Clients will benefit from advice and specialist casework across all advice issues including; welfare and benefits, housing, employment, money advice /debt, family and health.

5 Strategic Objectives

- 1) Increase the capacity and effectiveness of the general advice service for all our diverse clients by enabling greater engagement through phone, email and online channels
- 2) Improve routes into face to face advice for clients whose health, support needs or circumstances prevent them from using the phones or online channels
- 3) Expand the specialist services that offer in-depth casework for clients who are most at risk of financial distress, crisis or enduring disadvantage
- 4) Strengthen the sustainability of our organization through service expansion, greater collaboration and smarter use of technology
- 5) Maintaining a culture of excellence and inclusivity placing equality and diversity at the heart of everything we do. Investing in our people and supporting staff, volunteers and trustees to thrive and excel.

Summary of Major Risks

The organization, and the advice sector, is facing unprecedented change. Our risk management process has identified two new and significant risks to the organization. One being the increased demand for advice services as people recovery from the impact of the Covid 19 pandemic and the other relates to very significant changes to the way our services are funded.

Alongside these new risks there are increased concerns within existing, known, areas of risk that will also require us to take a different approach. The increased use of technology and the shift to remote working for many staff and volunteers brings the need for greater emphasis on information assurance and data protection. The likelihood of an economic slow-down will also have to be considered carefully as it may reduce the funding available for core services and specialist provision.

The combined impact of these individual risks highlights how important it is that we can adapt and change at pace, failure to do so will put our organization at risk. As the nature of our business changes so too must the skills and expertise of our team. This plan will make increased provision for expertise in relation to information assurance, IT management and remote supervision as they are now critical to our success. Other investments include the further refinement of new approaches to service delivery as we transform advice services in response to the new operating environment we face.