



Business and Development Plan 2019 – 2022

Summary of Full Plan

Vision Statement

Delivering Excellence in Prevention & Advice Services

Aims

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

Outcomes

Improving people's independence, prospects and wellbeing

Business Plan Objectives One Page Summary



Helping People Prepare for, and Manage Through, Key Life Events and Change Improving People's Independence, Prospects and Wellbeing

<p>Improving General Advice Debt and Welfare Services</p>  <p>Multi Channel Set Up</p> <ul style="list-style-type: none"> Enhanced initial assessment Customer response team Call or email back options On the day appointments Outreach and evening options <p>Change</p> <ul style="list-style-type: none"> Volunteer training (fast track) Supervision arrangements Volunteer roles (casework) <p>Expand</p> <ul style="list-style-type: none"> Advice facilitation partners Volunteer money advisers Volunteer welfare specialists <p>Launch</p> <ul style="list-style-type: none"> Universal Credit support service Hate Crime Reporting Centre 	<p>Expand Targeted Services for Priority Needs</p>  <p>Build Up</p> <ul style="list-style-type: none"> Services for people living with Cancer jointly with Taunton Expand referral networks for targeted services Develop the Assist Pathway for mental health service users <p>Develop</p> <ul style="list-style-type: none"> A holistic outcomes framework New services for frail and vulnerable people New services for people with long term health conditions (Dementia, Parkinson's etc.) Financial capability & advocacy services linked to health/social care clients <p>Continue</p> <ul style="list-style-type: none"> Warm Homes Winter Wellbeing 	<p>Quick and Easy Access to Self Help and Information</p>  <p>Partnerships</p> <ul style="list-style-type: none"> Colleges and schemes for young people Credit Unions & Unions etc. <p>Co-location</p> <ul style="list-style-type: none"> Information kiosks (sexual and health services, night-clubs, specialist teams) Links to our website within other sites & media <p>Digital Services</p> <ul style="list-style-type: none"> South Somerset CA app Advice buddy support built into our website Local webchat and WhatsApp channel Skype pilots 	<p>Increased collaboration</p>  <p>Shared</p> <ul style="list-style-type: none"> Back office Volunteer training New business development <p>Explore Potential Merger</p> <ul style="list-style-type: none"> Research, analysis and consultation Stakeholder negotiations <p>Maintaining A Culture of Excellence Where Staff and Volunteers Thrive</p>  <p>Rewarding Work and Volunteering</p> <ul style="list-style-type: none"> Encourage and support everyone with opportunities to develop their potential Increase transferable skills across the team <p>Career Prospects</p> <ul style="list-style-type: none"> Invest in accreditation for new and existing money advisers Create opportunities for work placements and apprenticeships Develop skills sharing and secondment opportunities with other Citizens Advice
<p>Success Factors</p> <p>Maintaining Advice Services Helping 4% of local people</p>	<p>Client Outcomes</p> <p>Greater Independence Better Prospects and Improved Wellbeing</p>	<p>Success Factor</p> <p>Increased awareness of and engagement with self help services</p>	<p>Success Factors</p> <p>Reduced running costs, Increased number of volunteers Improved sustainability</p>

Statement Of Purpose

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

The aims of Citizens Advice South Somerset are to:

1. Provide the advice and support people need to address their problems and maintain their independence
2. Campaign to improve the policies and practices that affect people's lives
3. Value diversity, promote equality and challenge discrimination

Our Vision

Delivering excellence in prevention and advice services - helping clients prepare for, and manage through, key life events and change – improving clients' independence, prosperity and wellbeing.

Mission

We will provide high quality, seamless and responsive services that meet our clients' needs enabling them to act early to avoid a problem escalating and providing advice to achieve resolution of their problems.

Outcome Framework

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

Greater Independence – clients benefit from gaining knowledge and a better understanding of their rights and responsibilities and are more able to move forward and address their issues. Clients learn how and when to act to avoid issues arising in the future

Better Prospects – clients benefit from learning to budget, problem solve, plan and manage their affairs, use online help and information resources, make and manage welfare claims

Improved Wellbeing – clients benefit from reduced risks of crisis, prevention of harm (eviction, debt, homelessness, abuse), reduced anxiety and improved circumstances

Citizens Advice South Somerset's Aspirations

We aim to be a service that is recognised locally and nationally for its impact, quality, innovation and contribution to addressing inequality and disadvantage.

Values

We are a person-centred organisation 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.

Service Offered

Clients will be offered self-help resources, opportunities to engage with early help and prevention programmes, access to advice and casework support. These services will be delivered across a range of channels (matching clients' needs) including face to face, phone, email and webchat.

Introduction and Overview

This Business Plan takes CASS through to 2022 and sets out the organisation's approach to developing a responsive, innovative and sustainable service that meets our communities' current and future needs.

In 2018 Somerset County Council announced its intention to withdraw core funding to all the advice charities in Somerset. The significance of this extends beyond the 38% reduction in our core funding as the County Council were pivotal in a wider conversation exploring options for a more joined up future for advice services in Somerset. Whilst the loss of County funding has not destabilised our other local funding relationships it does curtail some of our development plans.

The scenario of increased demand and reduced income is unlikely to be short-lived and we recognise that we must continue to transform the way we operate in order to sustain our services and achieve balanced budgets. Whilst the withdrawal of funding was sudden it was not entirely unforeseen and the measures taken in our previous business plan (improving operational efficiency, greater use of technology and increased collaboration) have helped to prepare the organisation for the challenges we now face.

Strategic Direction

In order to optimise resources the organisation will re-model the generalist advice service to focus on key priorities in the locality and to limit discretionary activity. In order to maintain delivery capacity in 2019/20 it will be necessary to invest some of the organisation's reserve funds. The investment will enable retention of key personnel and ensure that we have the capacity needed to re-model our operations and pursue increased collaboration. During 2019/20 the organisation will be restructured to create a transferrable team where skilled staff are able to switch between the Generalist Advice Service and Specialist Projects roles ("hybrid" roles). Other cost saving measures will include reduced outreach provision (limiting our focus to the highest need areas, and taking a more condensed approach to volunteer adviser training. These measures will enable us to adapt to reduced core funding whilst maintaining delivery of services to the highest possible standard.

Four Strategic Themes Guiding Our Development:

Our strategy for sustainability identifies four key areas for change:

- 1) Reformat the generalist advice service and maintain delivery capacity at 2018 levels (4% of adult population) to the highest possible standard
- 2) Evolve towards a shared operational model that will function effectively in a changing environment
- 3) Embrace technological developments to improve the quality, efficiency and relevance of services
- 4) Maintain and develop expertise, accreditations and delivery capacity in order to ensure that we are ready and able to respond to new market opportunities

The four strategic themes have informed this business plan and our specific objectives in order to ensure that the organisation remains resilient and innovative.

Overarching themes of supporting clients' independence, better and longer lasting outcomes (impact and benefits to clients) and value for money (efficiency) have also been used as a basis for our planning and developmental choices for the forthcoming years.

Table 1 summaries key strategic data gathered from the Community and Place Profile

Community Profile	Future Advice Needs	Service Development
Population: largest District in Somerset forecast to grow by 8% to 181,500 (currently 165,000) Rural and dispersed communities	8% increase in demand for advice would represent an increase of 462 clients per year	<ul style="list-style-type: none"> Weekly demand likely to increase by 10 clients Diversity rural access options Additional 7 advisers weekly Extra 2 interview rooms per day
Higher than average levels of fuel poverty with increasing proportion of fuel poor households (12.4% compared to 10.6% nationally) Higher than average domestic electricity consumption (4,568kWh (national 4,266))	Opportunity for growth in Energy Advice Services Research and Campaigns theme to promote help for those at risk and/or in need	Community Energy Campaign Expansion of EBDX delivery and referral partners Expansion of Surviving Winter and access to Fuel Vouchers
Higher than average proportion of people in lower skilled occupations and gross weekly wages lower than regional and national averages Gender based wage inequality (men working full time earning more than women) Higher than average number of micro/small employers (less than 9 employees)	Opportunity for growth in employment advice services Research and Campaigns theme in relation to wage equality Growth in employment casework and need for expert advice	Working clients' advice options to include out of hours services, webchat and specialist employment advice Increased need for capacity of in-house expert employment advisers Development of access to specialist pro-bono advice Dedicated research and campaigns theme
Unemployment is lower than average (0.8% population claiming JSA). The full roll out of U.C. over the next few years	Maintain benefits advice provision and develop on demand support for UC claimants	Increase digital assistance for unemployed claimants in areas of high digital exclusion
Aging population - people aged 65 forecast to double by 2039 to 61,400 people Higher number of people living with long term health conditions, mental health support needs and dementia High number of carers with 1 in 9 people providing unpaid care	Increased demand for discrete and tailored advice services for those aged 65 and over or living with health and support needs Increased demand for multi-agency working to meet the holistic needs of frail, vulnerable and older adults	<ul style="list-style-type: none"> Development of age appropriate advice options and access channels Development of financial capability support to facilitate sustained independence New services for frail, older and vulnerable adults to enable them to sustain independent living
Low levels of ethnic diversity (94.96% residents white British)	Discrete advice services that prioritize improved access for minorities	Development of services to support BME communities including Hate Crime Reporting
Digital Exclusion Heat Map (Somerset Intelligence Partnership)	Chard, Yeovil, Wincanton, Martock, Somerton	Further investment in digital services and digital assistance Maintain outreach provision
Index of Multiple Deprivation shows a slight shift to greater deprivation	7 Local Super Output Areas (6 in Yeovil and 1 Chard)	Retain access to advice in 7 LSOAs

Strategic Objectives

- 1) Improving the efficiency and impact of our general advice, debt and welfare services**
preventing crisis, resolving issues, and tackling the roots causes of disadvantage
 - a) Multi - Channel Service Expansion delivering full advice through a blend of channels (email, webchat, phone, face to face) 5 days per week including community outreach
 - b) Improved, specialist, Initial Assessment to deliver accurate and client centred triage and to facilitate smooth and effective onward transition for clients using drop-in in order to navigate clients through services available:
 - c) Expansion of Advice Facilitation Partners – training and supporting other agencies' staff to act as agents facilitating access to our advice for their clients
 - d) Improved access to onward referral where appropriate
 - e) Launch new Universal Credit Support Service and improve access to general advice

- 2) Expand targeted programmes engaging clients most in need of advice and helping them to maintain (or regain) independence and wellbeing - *targeted work for those in need of additional support***
 - a) Continue to develop the Macmillan Service in association with Taunton Citizens Advice and South Somerset team so that improved access and uptake is achieved
 - b) Maintain and develop the Assist Advice Pathway (recovery focused advice for mental health service users)
 - c) Develop and pilot new provision for clients with other long term or life limiting health conditions and clients using health and social care services
 - d) Develop and expand money advice services prioritising older, frail and young families

- 3) Increasing uptake of early and self-help services among hard to reach groups**
 - a) Explore partnership opportunities that improve engagement with young people and young carers, credit unions, employer groups and other priority groups etc
 - b) Co-locate early help to encourage engagement with Citizens Advice for clients at greatest risk of experiencing problems that may escalate to crisis
 - c) Expand and improve Digital Self Help Services

- 4) Increased emphasis on collaboration and joint working in order to improve the impact, quality and sustainability of the organisation and our services - partnerships**
 - a) Develop a shared, centralised, training provision in collaboration with other willing local Citizens Advice
 - b) Develop and implement shared back office arrangements for finance and HR administration with other willing local Citizens Advice
 - c) Explore potential merger with other willing local Citizens Advice

- 5) Maintaining an Enabling Culture Where Staff and Volunteers Thrive and Excel and invest in providing rewarding work, volunteering and partnership opportunities –**
 - a) Build the capacity of our team through the development of transferrable skill sets and broader competencies
 - b) Increase the number of fully trained volunteer advisers and supervisors active in the organisation
 - c) Promote diversity and inclusion and inclusion in our role as an employer, volunteer involving organisation and partner and take pro-active steps to reduce barriers that prevent or disadvantage people seeking to join our team

Business Plan KPIs

- ✓ Maintain service capacity at or above 2018 levels helping 4% or more of the adult population of the District (5,500 plus people a year)
- ✓ Improved client experience (reduce waiting times, increased appointment options)
- ✓ Achievement of client outcomes
- ✓ Increased up take of self- help services
- ✓ Reduction in costs
- ✓ Diversification of income sources and increased income
- ✓ Annual income targets (£30,000 plus) for specialist projects/services
- ✓ 65 volunteer advisers and 10 caseworkers active on the rota by March 2020
- ✓ Improved productivity of adviser volunteers to achieve 2 plus clients advised per session
- ✓ Annual staff and volunteer satisfaction survey

Client Outcomes

Service Design Features	Outcomes	Measurement and Quality Control
<p>Confidential and impartial advice needs assessment</p> <p>Provision of detailed, accurate, advice (explanation to clients of their options and next steps)</p> <p>Provision of information and support to enable the client to act upon their advice and address their issues</p>	<p>Greater Independence Clients benefit from:</p> <ul style="list-style-type: none"> ❖ Gaining knowledge and information on their rights, responsibilities and options (next steps) ❖ Being able to move forward and address or resolve their issues ❖ Learning how and when to act to avoid (or deal with) arising issues 	<p>Quality of Advice External Audit (clients' needs met, accuracy of advice, degree to which advice enabled client to move forward)</p> <p>Introducing clients to the use of the Citizens Advice public information site</p>
<p>Assistance and advocacy given to those clients that need additional support</p> <p>Links and guidance given to clients on sources of relevant help and support including referrals to other relevant services</p>	<p>Better Prospects Clients benefit from support with:</p> <ul style="list-style-type: none"> ❖ Budgeting ❖ Problem solving ❖ Planning and manage their affairs ❖ Using online help and information resources ❖ Decision making ❖ Making and managing welfare claims 	<p>Advice Outcomes Reports (income maximisation, debt reduction, fairer employment terms, sustained tenancies etc)</p>
<p>Free, local, easy access to advice and support when needed</p> <p>Continuity of client's advice and support across the Citizens Advice network</p>	<p>Improved Wellbeing Clients benefit from:</p> <ul style="list-style-type: none"> ❖ Reduced risk of crisis ❖ Prevention of harm (eviction, debt, homelessness, abuse) ❖ Reduced anxiety ❖ Improved circumstances (warm and secure homes, income maximisation, access to wider support networks) 	<p>Annual Client Satisfaction Survey</p> <p>Referrals Logs</p> <p>Case Studies</p> <p>Targeted programmes' evaluation reports</p>