

Strategic Business & Development Plan 2018-23



**citizens
advice**

**North
Hertfordshire**

The advice service of choice

Our Purpose: Why we do what we do

We want to improve the lives and wellbeing of residents in our area who are or would be disadvantaged without our intervention. We want to move them:

- from reliant to self reliant
- from crisis to stability in their lives
- from vulnerable to being secure
- from disengaged to engaged

Accessible

Quality

Equality

Influential

Sustainable

How we will achieve our purpose

We will make our service

- More accessible
- Of the highest quality standards
- More influential
- Stronger on equality and diversity and
- Sustainable and effective

These 5 themes will be our guiding principles

What we do

Citizens Advice North Hertfordshire provides the advice people need for the problems they face and works to improve the policies and practices that affect people's lives. We value diversity, promote equality and challenge discrimination.

In North Hertfordshire and South Cambridgeshire we provide flexible face-to-face advice in our Hitchin, Letchworth and Royston offices, plus many local settings. We offer telephone and email advice and help people find the information they need online.

We can deal with most problems people bring to us. We also offer specialist advice on benefits, debt, housing repossessions, managing money and energy.

Of those who sought our advice, 2 in 3 clients said we helped solve their problems and 4 in 5 said the advice improved their lives, reducing stress, improving finances and health.

About Citizens Advice North Hertfordshire

We help almost 6,000 people a year with nearly 10,000 issues. The top issues are benefits, debt, housing, family and employment.

We help everyone, particularly those most in need. 38% of our clients have a disability or long-term health condition. 22% have a mental health issue.

Our 70 dedicated volunteers, including trustees, provide at least £465,000 per year in donated hours. Our 20 staff (10 FTE) have a huge range and depth of expertise.

We work in partnership with many agencies to help local people. Key partners include: North Hertfordshire District Council, Hertfordshire County Council, North Hertfordshire Homes, Letchworth Garden City Heritage Foundation, MIND, AgeUK, homelessness organisations, foodbanks, Jobcentre, health services, hospice, and many more.

Context

- CANH is a charity dependent on grant funding and donations
- We are a member of national Citizens Advice and operate to its standards including Advice Quality Standard (AQS) and Money Advice Service (MAS)
- Over the next 5 years, income and expenditure will be under pressure and demands from funders are likely to increase
- Demand for our help is rising and issues change over time
- Technological and social changes are driving new ways of working

2018 and beyond – the challenges

- Funding for core service from NHDC uncertain beyond 2020
- Project funding not guaranteed
- Increased competition for funding
- Demand for advice rises year on year
- Universal Credit local launch 2018
- Brexit opportunities and threats
- Attracting and retaining staff and volunteers
- Maintaining the quality of our advice through change
- Increasing automation and digital economy

Our strategic priorities over the next 5 years

In the following sections our priorities are outlined under our five themes.

➤ Accessible, Quality, Equality, Influential and Sustainable

These themes have been derived from the work that we have done to clarify how we intend to act to achieve our purpose.

We have examined our client and stakeholder needs in the light of the challenges facing the community over the next five years and developed our priorities accordingly

Our future plans, projects and objectives will be firmly based around these priorities over the next five years.

Accessible

1. Explore online advice via a range of channels
2. Increase accessibility to and effectiveness of our Adviceline service
3. Develop and maintain expertise to deliver service requirements
4. Continue to review our service model

Quality

1. Implement effective performance standards at all levels
2. Review performance results on a regular basis and make changes to plans and processes when necessary
3. Continue to invest in and improve on our leadership
4. Maintain effective recruitment, training and development plans for staff volunteers and trustees
5. Ensure staff and volunteers are adequately supported and valued

Influential

1. Make a strong contribution to research and campaigns both locally and nationally
2. Strengthen partnerships with local leading organisations
3. Educate the next generation to prevent them from experiencing the same need for our advice
4. Maintain active presence in traditional and digital media
5. Develop the way we research and communicate the impact that we have

Equality

1. Improve identification of discrimination in advice issues
2. Identify local discrimination trends through strong research process
3. Improve partnerships with organisations working in discrimination
4. Attract more diverse people to support our service delivery
5. Improve services for people with mental health problems
6. Promote fair treatment of migrants and community cohesion

Sustainable

1. Engage in partnerships that add to our service
2. Explore closer working potential with other local Citizens Advice
3. Develop a fundraising strategy and implementation plan
4. Review the efficiency and effectiveness of our service offers, contracts and processes
5. Develop a strong risk management culture

2018/19 focus

We recognise that there is much to be achieved over the next 5 years and that it will be a challenging period. This year we will focus on:

- Continuous improvement in qualitative and quantitative performance across all channels
- Enhancing our funding options by developing our fundraising strategy and extending our relationships and influence with partners, including businesses
- Continuing to explore benefits of closer working with other organisations and developing scenarios aligned with our strategy
- Recruiting and developing staff and volunteers to meet service needs; ensuring focus on the most vulnerable and readiness for the main Universal Credit rollout in June 2018
- Exploring ways to educate the next generation
- Identifying developing trends from research and how best to promote the work we do

More accessible 1

A1 Explore online advice via a range of channels

- a) Install 2 self-help tablets for clients in Letchworth waiting room to support Universal Credit claimants and other clients (July 2018)
- b) Pilot a self-help area for clients with information assistants at Letchworth (Jan-June 2019)
- c) Introduce using Skype for advice (BSL users) and remote supervision when technically viable (Sept 2018)
- d) Introduce using webchat for advice when viable (2020/21)

More Accessible 2

A2 Increase accessibility to and effectiveness of our Adviceline service

- a) Identify and train sufficient volunteer supervisors and flexible volunteers for Adviceline to meet 50% of call demand (March 2019)
 - i. 1 FTE or number of hours required to meet demand (125 hours per month logged on) (March 2019)
- b) Implement revised Advice Framework for Adviceline Group (April to June 2018)
- c) Seek funding for paid Hertfordshire Adviceline Coordinator (March 2019)
- d) Seek funding for Adviceline projects (Dec 2019)

More Accessible 3

A3 Develop and maintain expertise to deliver service requirements

- a) Establish and set up suitable platforms for online learning for internal training (Sept-Dec 2018)
- b) Create content for online training for advisers (Jan-June 2019)
- c) Collaborate with other LCA Training Supervisors to share resources (Oct-March 2019)
- d) Create training budget linked to training plan (April-June 2018)

More Accessible 4

A4 Continue to review our service model

- a) Review advice service delivery to ensure we support the most vulnerable clients (Oct-Dec 2018)
- b) Pilot using Casebook appointments system to increase efficiency (Oct-Dec 2018)
- c) Complete our scenario planning for whole service (July-Nov 2018)
 - i. Create scenario options for Hitchin and Royston service delivery (2019/20)

Of the Highest Quality 1

Q1 Implement effective performance standards at all levels

- a) Maintain KPIs for Performance and Quality Framework (March 2019)
- b) Maintain Quality of Customer Outcome and Customer Service at Green (quarterly)
 - i. Implement casework coaching to improve consistency and quality of casework (Jan-Mar 2019)
- c) Maintain Green for all areas of Leadership Self Assessment (Feb 2019)
 - i. Apply for Advice Quality Standard for Debt and Benefits Casework (Sept 2019 - March 2020)

Of the Highest Quality 2

Q2 Review performance results on a regular basis and make changes to plans and processes when necessary

- a) Review PQF dashboard quarterly
- b) Create Projects Review document to track performance against KPIs and project targets (June – Sept 2018)

Q3 Continue to invest in and improve on our leadership

- a) Carry out annual reviews with trustees (July-Sept 2018)
- b) Carry out training needs analysis for trustees and senior team (Nov-Dec 2018)

Of the Highest Quality 3

Q4 Maintain effective recruitment, training and development plans for staff, volunteers and trustees

- a) Maintain or increase volunteer numbers to between 70-90 (excluding trustees) (March 2019)
- b) Maintain trustee numbers between 8-10 (April 2018-March 2019)
- c) Develop Training Plan that covers quality, research and campaigns and trustee development to meet the needs of the service (Nov-Dec 2018)

Of the Highest Quality 4

Q5 Ensure staff and volunteers are adequately supported and valued

- a) Complete appraisals and regular supervision for all our people (April – Sept 2018)
 - i. Review appraisals system for volunteers (July-Dec 2018)
- b) Maintain good satisfaction levels in People Survey and act on feedback or any areas for concern (Oct 2018 – Jan 2019)
- c) Recognise and celebrate good performance and contributions to the service (April - March 2019)
 - i. Pilot a range of ways to increase the recognition of contribution (e.g. briefing, long-service & special certificates, awards) (April - March 2019)

More influential 1

I1 Make a strong contribution to research and campaigns both locally and nationally

- a) Carry out 4 local or national campaigns (April 2018 - March 2019)
- b) Recruit 4 volunteers to carry out R&C work (June 2018 - March 2019)

I2 Strengthen partnerships with local leading organisations

- o Identify and carry out 2 joint campaigns (April 2018 - March 2019)

More influential 2

I3 Educate the next generation to prevent them from experiencing the same need for our advice

- a) Include analysis of possible funding sources and opportunities to carry out work with schools or families in our fundraising strategy (March 2019)
- b) Carry out 2 workshops/activities with schools, colleges or families (2019/20)

I4 Maintain active presence in traditional and digital media

- a) 12 articles in local press, active Twitter and Facebook presence (April 2018 - March 2019)
- a) Develop 3 joint articles or webpages with other LCA or partners to promote services (March 2019)

More Influential 3

I5 Develop the way we research and communicate the impact that we have

- a) Communicate our R&C work and successes to all our people – quarterly report & staff meetings (March 2019)
- a) Circulate Advice Service Impact Report to partners and stakeholders twice yearly (March 2019)

Stronger on Equality and Diversity 1

E1 Improve identification of discrimination in advice issues

- a) 50% increase in recording of discrimination issues (March 2019)
 - i. Deliver Know Your Resources discrimination training (April-June 2018)
 - ii. Include discrimination AIC reminders in Weekly Briefing (April - March 2019)
 - iii. Embed ASK initiative regarding gender violence across the service (April - March 2019)
- b) Identify local discrimination trends through strong research process and communicate through quarterly R&C report (quarterly)

Stronger on Equality and Diversity 2

E2 Improve partnerships with organisations working in discrimination

- a) Deliver 4 training sessions on discrimination/equalities for our people from specialist external organisations, including new organisations (March 2019)
- a) Develop 2 new partners for referrals or signposting for specialist support (March 2019)

E3 Attract more diverse people to support our service delivery

- a) Monitor diversity of workforce (staff, vols & trustees) against community and client profiles (March 2019)

Stronger on Equality and Diversity 3

E4 Improve services for people with mental health problems

- a) Include analysis of possible funding sources and partnerships to deliver specific mental health projects in our fundraising strategy (July 2018)
- b) Work closely in partnership with at least 2 organisations to support clients and volunteers with mental health issues (March 2019)

E5 Promote fair treatment of migrants and community cohesion

- a) Deliver training on immigration issues to advice workers (March 2019)
- b) Identify any local discrimination issues and provide case studies to promote internally or externally (March 2019)

Sustainable and Effective 1

S1 Engage in partnerships that add to our service

- a) Develop and submit 2 joint funding bids with partners (March 2019)
- b) Develop more effective referral systems with 2 partners (March 2019)

S2 Explore closer working potential with other local Citizens Advice

- a) Create joint working group with Citizens Advice Stevenage and other LCA (June 2018)
- b) Pilot 1 year of joint fundraiser with Citizens Advice Stevenage (March 2019)

S3 Develop a fundraising strategy and implementation plan (Sept 2018)

Sustainable and Effective 2

S4 Review the efficiency and effectiveness of our service offers, contracts and processes

- a) Review 3 suppliers to ensure cost efficiencies and service effectiveness (Dec 2018)
- b) Identify and implement more effective processes for core day-to-day functions (March 2019)
- a) Carry out analysis of efficiencies to drive performance improvements (Sept 2018-March 2019)

Sustainable and effective 3

S5 Develop a strong risk management culture

- Agree risk strategy (Dec 2018)
- Develop competitor and stakeholder analyses (Sept 2018)

Appendices

Appendix 1 - Community Advice Needs Analysis

Appendix 2 - Description of current services – core and projects

Appendix 3 - Current budget and future projections

Appendix 4 - Organisational Chart

Appendix 5 – People Survey Report

Appendix 6 - Annual Report, including Research and Campaigns

Appendix 7 - Funder and Partner Satisfaction Survey

Appendix 8 - Business Continuity Plan

Appendix 9 - Information Assurance Annual Review



**Citizens Advice North Hertfordshire
March 2018**