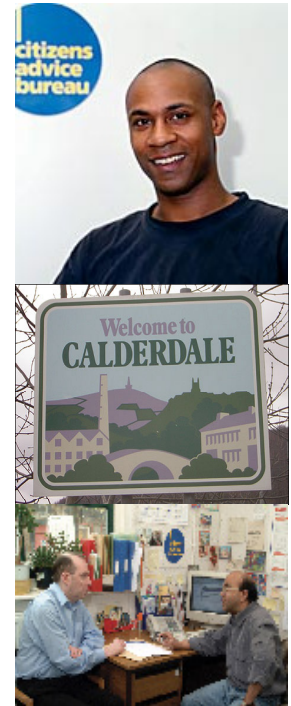


the charity for
your community



Calderdale District Citizens Advice Bureau

Service Delivery Plan 2009-12



1.0 Introduction

This is the Service Delivery Plan for Calderdale District Citizens Advice Bureau 2009-12. It is an internally facing document that will;

1. Show our staff, volunteers and trustees how we will achieve the objectives set out in our strategic plan.
2. Show how we will change the structure of our service in the next 3 years.
3. Outline the projects that we will undertake to meet the priorities in our strategy document.
4. Demonstrate how we will measure the success of our project.

2.0 Our Vision

Our vision for the Citizens Advice Service in Calderdale is to be recognised above all as an agent of social change; helping people take more control of their lives through accessible, responsive advice and enriching society through powerful influence on social policy.

3.0 Our Vision for the Service

3.1 What will the service look like in 18 months' time?

Externally, our service in 18 months' time will be broadly similar to our current service. But internally, we are consolidating the service by refocusing our management structure and cost base. We will work smarter and harder to deliver our objectives, and the objectives of our partners. By the end of September 2010, our service will consist of;

Advice services delivered from

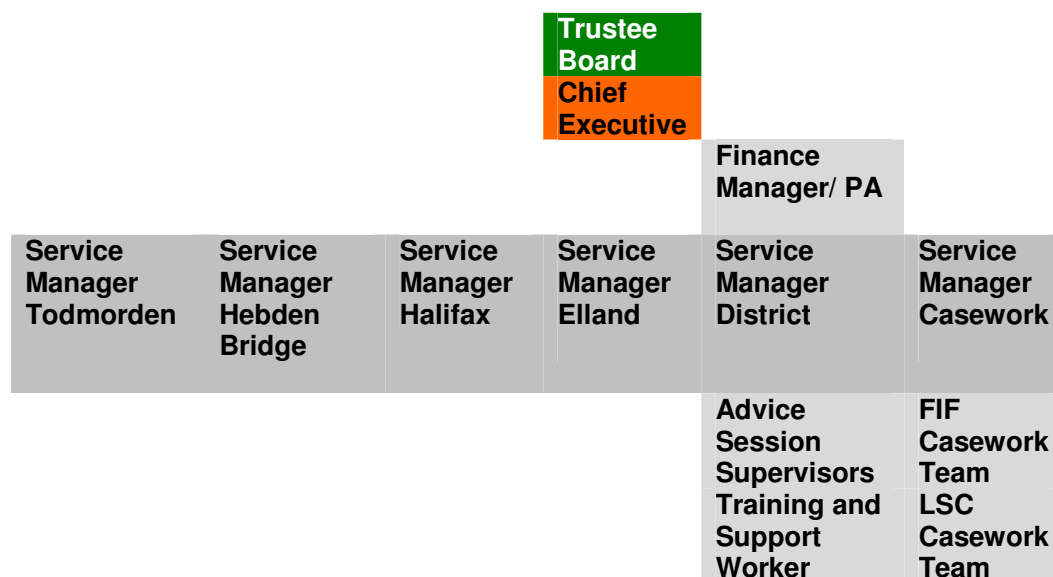
- Halifax
- Todmorden
- Hebden Bridge
- Elland

The way we deliver will also change. Our services will feature “drop-in advice services,” appointments with additional specialist sessions for Punjabi and Urdu speakers and an appointment service for Debt, Housing and Welfare Benefits specialists. Underlining all of this is a Telephone Advice Line Services delivered from the Hebden Bridge Centre and enabling us to deliver advice across the district, and providing a first point of contact for the service.



3.2 How will the service be managed?

This service will be delivered through the organisational structure below.



In order to deliver our objectives we have introduced a flat management structure, with every Service Manager involved directly in delivering advice, either by conducting casework or by supervising advice given by volunteers. Service Managers will have responsibility for the training and development of staff and volunteers involved in their service area.

Service Managers will also carry responsibility for functional themes within the organisation such as Social Policy, Quality, or the Telephone Advice Line.

Another significant change in the way that we are organised will lie in a changing approach to casework. We will reorganise our opening times, resources and staffing to enable us to offer longer appointments and more detailed follow up and casework to more people in Calderdale. These appointments will enable us to deliver more supportive and higher-level work targeted at the most vulnerable in Calderdale.

In the future, many more of our staff and volunteers will take on responsibility for small caseloads of work. This work will be supervised and supported by our specialist caseworkers and by Service Managers. This change in our working practices will make us more flexible, and also allow us to focus more time on the clients who most need our help.

This change in culture will be one of our biggest challenges in the first 18 months of this delivery plan. The changes will make us more flexible, more targeted in our services, and will develop the skills of the people that we have in the organisation.

3.3 What will the service look like in 2012?

Our service will grow and develop through this period, delivering more advice to people in Calderdale, targeted better at the most vulnerable in society.

The services management structure will remain the same as that evolved in the first period and the key themes of flexibility, and focused support delivered to the most vulnerable in Calderdale are ongoing themes for us.

We will aim to develop a network of “problem noticers” in Calderdale, building links with partner agencies such as Children’s Centres and the Health Centres to help them recognise when advice services can help them meet their own objectives. This theme will extend across the range of statutory and voluntary sector agencies, and we’ll look for funding to provide a network of outreach workers to provide services within, and in partnership with, other organisations in Calderdale.

We will look to develop further the networks of voluntary sector partners in Calderdale, so that clients can be referred into our service from a variety of client based organisations. We recognize that currently, many groups in Calderdale do not “trust” the work that we do, and are wary of sending their clients to us. We will work hard over this period to build trust and confidence in our service.

Our partnership with Calderdale Council will be key in this period. We will support traditional advice sector priorities by working closely with Trailblazer, Mortgage rescue Schemes and Housing Advice services. We will also look to support council campaigns on Warmzone and on “In Work Benefits.”

3.4 How will this service be funded?

Our core Advice Service will be funded for a figure of approximately £370k per year from Calderdale Council. Whilst this figure remains almost static over the next three years, the volume of clients is already rising sharply and is likely to continue to do so. Hence it is vital that we supplement this core funding with additional funding and contracts for additional projects including:

- Work completed under a Legal Services Commission Contract; delivering casework and representation to the most financially vulnerable in society. This contract pays on a case by case basis, in arrears.
- Financial Inclusion Fund work. Delivering debt advice to individuals who are excluded from normal financial systems.
- We will provide additional pieces of short term project work, supported by additional funding where it fits with our wider objectives.

A key challenge for us in this period is in delivering advice to people affected by the recession in Calderdale. Our service is experiencing a significant increase in advice for working people aged 35-49 who have never needed to use CAB and advice services before. Providing appropriate services for these people will be a challenge for us in this period.

4.0 What are the key areas of development for the Service?

Key Theme 1 “Being there” flexible delivery and outreach.

We recognize that the core service that we provide is not suitable for all people. We are committed to provide a service that targets “hard to reach groups” by providing advice and information to people disadvantaged by age, health, ethnicity or by where they live.

| Actions | Measureable |
|--|---|
| BT1 To build better links with Calderdale PCT and target advice at clients with Mental Health, Drug and Addiction issues and Long Term Medical Conditions. | Joint working arrangements. |
| BT2 To develop a team of Outreach workers providing targeted outreach sessions across Calderdale | Service in place by April 2012 |
| BT3 To target advice at the most vulnerable parts of Calderdale according to the Index of Multiple Deprivation. | Numbers of clients assisted in these areas. |

Key Theme 2 New models of partnership working & training

We know we do a great job. We know we help people and we know what our impact is on the fabric of life in Calderdale.

We’re less good at telling others how good we are, of asserting our value, and demonstrating where we fit into the wider priorities of Calderdale Council and its partners. Although we do contribute to the wider agendas of tackling deprivation and “narrowing the gap,” our partners do not always understand how we do this.

We can work more effectively in Calderdale by working in close partnership with other organisations.

| Actions | Measureable |
|--|---|
| P1. We will support a network of voluntary and statutory sector “problem noticers” in Calderdale. We will provide easy signposting and access to our telephone advice service. | Numbers of training & information sessions provided to our partners |
| P2. We will campaign actively on Social Policy Issues, and use Press and Communications better as a way of informing people of their rights. | Numbers of Press Pieces and Campaigns |
| P3. We will work hard to improve internal communications within the service. | Staff and Volunteer Satisfaction Surveys. |
| P4. We will become active members of the Local Strategic Partnership, contributing to our partners priorities and focusing on the principle of “narrowing the gap” | Membership and contribution to the LSP |

Key Theme 3 Developing Our Volunteers

Our volunteers are our greatest asset. The combination of well supervised, motivated and skilled volunteers, working alongside our “Advisernet” service, enables us to provide the service that we do.

We will recruit additional highly skilled volunteers, and support our skilled volunteers so that they can take on supervised casework appropriate to their skills. The development of a larger volunteer base, with more training, will allow us to provide a greater number of appointments for clients, and enable us to give a deeper and more effective service.

| Actions | Measureable |
|---|---|
| V1 We will review our recruitment and training procedures to improve the effectiveness of our volunteering. | New recruitment process by end September 2009. Staff & Volunteers Satisfaction Survey. 15 New volunteers by December 2009 |
| V2 We will develop volunteer advice session supervisors by supporting them with formal and informal training. | Development of 3 volunteer advice session supervisors by end December 2009 |
| V3 We will provide each volunteer with effective development plans, supervision and annual reviews to help and support their progression. | 90% of volunteers to have a Joint Progress Review by end March 2010 |
| V4 We will invest in our Halifax premises, to make it a safe and professional place to work. | Complete refurbishment by end July 2009. |
| V5 We will invest in training and staff development, to develop our staff and volunteers into the new roles we expect from them. | Improved organisational T&D plan delivered by August 2009 |

Key Theme 4 Re-structuring our organisation

4.1 Legal Services Commission Work

Legal Services Commission Funding is targeted at the most vulnerable (financially) in society. We will prioritise clients who are eligible for LSC funding in Calderdale, and develop our people and services to be able to provide more LSC funded casework.

In doing this we are helping the most vulnerable in society and supporting a number of our partners’ “narrowing the gap” agendas. We are providing the complex casework that no other organisation in Calderdale has the expertise or skill to do, and leveraging in additional funding from outside of Calderdale to tackle deprivation in the borough.

| Actions | Measureable |
|--|--|
| LSC1 We will develop LSC Casework facilities to allow us to complete eligible casework in all of the locations that we operate. | Networked Case Management System by 31 March 2010 |
| LSC2 We will expand our LSC caseworker capacity, provide training, support and appropriate supervision to allow as many members of our staff and volunteers to contribute to LSC casework as is allowable under the contract. | Completion of 1000 LSC funded cases per year by September 2010. |
| LSC3 We will review our opening hours, providing more appointments to allow for more complex casework. We will improve our assessment procedures to signpost more, and use the resources this frees up to provide the most vulnerable with better support and casework. We will recruit additional volunteers to support this process. | 20% increase in the number of available appointments across the service by March 2011. |
| LSC4 We will bid for and achieve an enhanced Legal Services Commission Contract to commence April 2010. | Contract bid document tender and 3 year contract won by 1 April 2009 |

4.2 Changing the way that we work-self management

Our service is staffed by excellent , committed people. They believe in what we do, are committed to the service and to the idea of advice as a tool for helping people and tackling deprivation. We want to broaden the focus of our management from just checking the work of others, to empowering them and to supporting their development.

The same concept relates to our clients. The recession will bring a new type of customer to the service. We need to empower these people, to help those that are able to help themselves.

| Actions | Measureable |
|---|--|
| SM 1 Not all of our clients require the same level of service. Some of our clients can support themselves, and the recession will bring us into many competent, skilled clients who will be as happy getting advice from a telephone or the internet. We will refer cases out of the service where the client can be equally well served by another agency such as Consumer Direct, Grant Thornton, Payplan or CCCS, or by www.adviceguide.org.uk | |
| SM 2 We will empower our staff and volunteers to take responsibility in a managed way for the service that they provide. We trust our staff and volunteers. We trust them to self assess when their advice is good, and when it needs checking. | Volunteer driven casework checking system in line with CitA Guidance |
| SM 3 We will simplify and remove all processes and procedures that do not add to our core business objectives. | Review of all processes and procedures in the service by end March 2010. |

5.0 How will we measure our success?

5.1 By the impact our services have on the most deprived people in Calderdale

We will focus services in Calderdale on the super output areas identified by the Index of Multiple Deprivation as the 5% most deprived in the country. The positive links between good advice and deprivation are well documented. By providing focused advice at people in these areas we will make a positive contribution to the priorities of our strategic partners, and to the health and wellbeing of people in Calderdale.

| | 2008/9 | 2009/10 | 2010/11 | 2011/12 |
|--|-----------------------|------------------------|------------------------|------------------------|
| Clients from postcodes in most deprived super output areas | 995 problems resolved | 1100 problems resolved | 1200 problems resolved | 1300 problems resolved |

5.2 By improving services offered to the most vulnerable people in Calderdale

We will focus services on the most deprived 10% of people in Calderdale as defined by income (LSC eligible clients). We will focus work on people in these areas, and provide more detailed support, casework and representation for clients from this group.

| | 2008/9 | 2009/10 | 2010/11 | 2011/12 |
|--|-----------|-----------|------------|------------|
| Numbers of clients in the most vulnerable group provided with complex support, casework and representation | 879 cases | 967 cases | 1063 cases | 1169 cases |

5.3 By developing our key outcome areas throughout the economic downturn

| | 2008/9 | 2009/10 | 2010/11 | 2011/12 |
|--|--|--|--|--|
| Overall number of clients helped in Calderdale | 10201 people | 11221 people | 12,343 people | 13,577 people |
| Amount of Welfare Benefits gained for people in Calderdale | £982,774 additional benefits gained for people in Calderdale | £1,000,000 additional benefits gained for people in Calderdale | £1,050,000 additional benefits gained for people in Calderdale | £1,100,000 additional benefits gained for people in Calderdale |
| Amount of Debt Managed on behalf of our clients. | £3,464,874 (source PG Debt & CASE) | £3.7m | £4.0m | £4.3m |
| Numbers of Housing Repossessions avoided | 123 people represented at court with positive results | 130 people represented at court with positive results | 135 people represented at court with positive results | 140 people represented at court with positive results |

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