

The Citizens Advice service strategy 2010–14



Foreword



The Citizens Advice service remains the best known and most trusted source of free, independent and impartial advice and in the current economic environment we are aware that demand for our frontline services outstrips our capacity to deliver.

This strategy sets out our aspirations and strategic aims to ensure the service can continue to provide advice for as many people as possible and continue making a positive difference to people's lives.

The Citizens Advice service will emerge stronger and fitter if we achieve our aims. With the continued dedication of our committed volunteers and workforce and the support and strength of our partners and government, we will deliver the highest quality advice to the maximum amount of people.

John Gladwin
Chair of Citizens Advice



Contents

Introduction	Page 4
An overview	Page 5
Transform the advice process for clients and advisers	Page 8
Develop holistic and preventative money advice services	Page 13
Extend our policy and campaigning work	Page 15
Strengthen our network	Page 17
Promote partnerships and build support	Page 19
Enlarge and develop our workforce	Page 21
Make equality and diversity a part of everything we do	Page 23
Provide the systems and resources to deliver our strategy	Page 25
Measures for success	Page 27

This document

The following pages outline the Citizens Advice service strategy for April 2010 to March 2014. It sets out our vision, our strategic aims and objectives, what we plan to do, the areas where we need additional income and resources, what we will deliver and the outcomes we will achieve.

The Citizens Advice service

At 1 April 2010 there are 390 Citizens Advice Bureaux across England and Wales, all of which are independent registered charities. Citizens Advice itself is also an independent registered charity, as well as being the membership organisation for bureaux. Together we make up the Citizens Advice service.

There are 22 members in Northern Ireland and we work closely with Citizens Advice Scotland ensuring services are provided across the whole of Great Britain.

Our aims and principles

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination. Its aims are to provide the advice people need for the problems they face, and to improve the policies and practices that affect people's lives.

How the public knows us

The Citizens Advice service offers information and advice through face-to-face, telephone and email services and online via Adviceguide.org.uk (our public advice website) Citizens Advice Bureaux make face-to-face advice available from over 3,300 locations. At 1 April 2010, of the 27,000 people who work for the service, 21,000 of them are volunteers and 6,000 are paid staff.

In 2009/10 the Citizens Advice service

- helped over **2 million** unique clients
- had over **10 million** visits to Adviceguide (our public advice website)
- had over **5 million** contacts with clients
- advised on over **7 million** problems
- received over **45,000** bureau evidence forms for our social policy work.

The client is at the heart of the Citizens Advice service. We are here to ensure that people who need help get the right help at the right time.

With an increase in the demand for advice, caused by and expected to far outlast the recession, this is quite a challenge to step up to. And it doesn't mean simply doing more of what we're already doing either. We want to go further than that.

Members of the public expect to be able to access advice easily, when and how they choose, and to feel comfortable doing it. We want to meet their expectations with a more flexible, responsive and approachable service.

And funders expect strong clear evidence of outcomes and higher service delivery standards. We want to meet their expectations too, with effective advice and preventative services that are well led and well administered.

But we hold these ambitions in a testing economic climate. There are unprecedented pressures on public spending and the move towards commissioning puts bureaux into direct competition with the private sector.

So, how do we marry our plans for growth and development with the financial constraints we face? There is no quick and easy solution but we believe we can do it, and this is how.

We will transform the advice-giving process

For faster and more convenient access to the most appropriate help we will: increase the number of ways to contact us online, by telephone and face-to-face; ensure clients can move from one to another without needing to repeat themselves; and have effective referral processes in place, both within and beyond the service. We will also enhance our self-help offering so that face-to-face services are freed up for those in greatest need.

We will develop preventative services

We will develop preventative services, focusing on the biggest issues we deal with – debt and money, and roll these services out across the entire network. Money guidance and financial capability training will initially complement, but ultimately make inroads into, our debt advice work. In doing so we will free up problem solving resources.

We will extend our policy and campaigning work

By tackling unjust policies and practices at their source we can prevent more problems arising than we could ever hope to solve through our advice. The quantity and quality of our client evidence is unparalleled and, alone, we are a force to be reckoned with.

But as the leading advice agency we are also ideally placed to lead cross-sector campaigns which speak even louder.

We will strengthen our network

Our geographic coverage is a huge part of our strength. Bureaux know and understand their communities, and recruit volunteers who want to help locally. We will continue to provide services to all communities through a network of over 3,000 locations, however, a reduction in the number of bureaux as legal entities is inevitable due to mergers but there will be new models of partnership working designed to improve frontline services and deliver efficiencies. The governance, management and leadership within the service must be robust itself to maintain the strength of the network through these anticipated changes.

We will do more in partnership

Working in partnership can and already does help us to deliver better services to more clients with the same level of resources. We will identify new partners in local and national government, as well as the voluntary sector, with whom we can work towards shared goals of tackling social exclusion, helping people into work, building more cohesive communities and enhancing health.

We will enlarge and develop our workforce

There are limits to the increase in results that can be achieved through improved efficiencies alone. Doing more with less will be necessary, but sometimes we need more to do more. We need to attract more volunteers, into a wider range of roles, and offer more opportunities for progression within and beyond the service, and we need the support to do this.

We will build equality and diversity into everything we do

Our guiding principles are to value diversity and promote equality. However, some of the people who are most in need of our help in this respect are least likely to walk into a bureau. We need to get better at developing discrimination advice services and raising awareness of them, and we recognise that we can only truly understand and challenge discrimination when we are diverse ourselves.

We will invest in the back-end systems to make all of this happen

We can only serve clients as quickly and efficiently as the back-end systems of the day allow – even if we have the potential to do far more. We will offer common administrative and support systems across the service so that operations can be integrated, faster and more economically.

In doing so, by 2014, we will have realised our vision

- Clients will be able to contact us easily by phone or email, or by just dropping into one of our outlets.
- However they get in touch, clients will find a free, independent, confidential and impartial service; one that provides problem solving advice as well as preventative information.
- After a brief initial interview we will give the help that is needed. This may take the form of a detailed face-to-face session, advocacy or support in resolving an issue themselves through signposting, self-help materials and use of interactive tools.
- We will be working with other advice providers so that, whichever of us a client approaches first, they will get the help needed from the most appropriate provider without having to start the process again.
- We will use the experiences clients share with us, anonymously, to campaign for improvement to the policies and practices that affect people's lives.
- Wherever and however we are contacted, clients will be able to access the same standard of service and will receive the same level of care.
- Millions will be enjoying the benefits of accessing these services. Where people in need are failing to contact us, we will be reaching out to them.

What resources will we need?

In 2008/09 the service had incoming resources of £182 million. We expect that to have increased for 2009/10; however, we are aware of the pressure to reduce resources across the whole service in future years.

In developing our strategy we have set out what we want to achieve with the resources we think will be available but we have also identified a) where new funding will be needed and can be secured and b) where we can only develop if new funding is secured.

How will we measure our success?

For each strategic aim we have identified the outcomes for our clients, the broad activities we will undertake and the key things that will be delivered.

We have summarised the measures and targets that will be achieved by 2014 at the end of this document.

We will measure our delivery in a number of ways including: evidence from clients in our databases; surveys with clients, volunteers, bureaux and other stakeholders on satisfaction and outcomes; research and evaluations.

1. Transform the advice process for clients and advisers

Strategic objectives

- 1.1 To become the main gateway for anyone wanting advice and information and get faster access for our clients to public services.
- 1.2 To improve access for more clients with telephone, email and face-to-face services that are truly connected together, resulting in a more efficient service that gives clients more choice.
- 1.3 To focus our face-to-face services on those who need us most, by giving more people the means to help themselves whilst remaining a free service for all.

Rationale

People's need for information and advice is what drives the service. By 2014, our clients will want to get help in the way they choose: electronic (websites and email), by phone, face-to-face and through self-help materials (on paper and electronically). In addition we will be providing advice and information through kiosks in local communities, using decision tree software, workshops and seminars, as well as considering all emerging technologies (downloadable pod- and web-casts on specific advice issues).

In funding advice provision, national and local government want to ensure that frontline services are client centred and that citizens know where to go for advice. They will want to know that clients receive high quality information and advice and are able to solve their problems in the easiest way possible. They will favour services that are joined up where agencies work in partnership either through co-location of services or through effective referral arrangements.

Face-to-face services are essential for people who face the most serious and urgent threats to their rights, and/or face the greatest barriers to resolving their problems themselves.

In providing all of our services we want our clients to know what they can expect from us.

Becoming a gateway for information and advice

We are already the largest provider of frontline generalist advice with a presence in a wide range of community locations. The service is well placed to become the gateway for all information and advice services.

The opportunity exists for us to deliver our services through a national gateway using telephone, website, email, and face-to-face sessions, with clients being able to find the most appropriate way to help them solve their problem(s).

The development of our telephone and improved web services will make us well placed to become a national gateway service through Adviceline and Adviceguide (our public advice website). We will also have the ability to refer both within and beyond the service.

Single telephone number (Adviceline)

If a client chooses to start an enquiry by telephone we will seek to provide them with information they need to solve their problem. If the client needs more assistance we will offer more detailed phone advice, or an appointment for a face-to-face session or a referral to another service if that is the best option for the client. Based on our evidence we would expect 50 per cent of callers' enquiries to be resolved through a single call, 25 per cent to receive an

appointment with an adviser and 25 per cent to be referred to another service.

As well as providing clients with a choice about how they access our services, we will also reduce duplication by only recording their information once. Whenever a client needs to access our service again an adviser will be able to access their details and begin to offer assistance.

By 2014 the line could provide capacity to handle at least 2.5 million calls from 1.2 million additional clients each year. We will need additional funding to achieve this.

Face-to-face focus on those in greatest need

We want to ensure our core face-to-face advice is concentrated on those defined as in 'greatest need' of advice, i.e. as:

- People who face the most serious and urgent threats to their rights, and/or face the greatest barriers to resolving their problems themselves.

However, in planning the development of services we will aim to:

1. Deliver more consistent and better targeted services to those in greatest need.
2. Engage those in 'greatest need' more effectively in the service.
3. Raise the profile of the service so that it is credible, competent, confident and authoritative for those in greatest need.

To aid with planning, and building on the greatest need definition agreed by the Trustee Board, we have adopted the following criteria to assist in judging who is in greatest need:

- Those who find it most difficult to assert their rights or access services.
- Those who have complex/multiple needs.
- Those in crisis or in need of urgent help.
- Those whose physical safety is threatened including through gender violence and hate crime.
- Those who are 'outside the system' and are in need of support or representation.

We will become a service that understands the challenges, issues, and geography of all members of the communities in which we operate. In some cases, we must do more to actively reach out to people from the types of groups identified in the FAIR strategy. In other cases bureaux already work hard to engage those who are the most vulnerable or deprived. Where this is the case, the challenge for these bureaux is to provide advice on the full range of issues that these clients need help with (especially where it is not available elsewhere) and that often they do not raise with us.

Alternatives to face-to-face advice and telephone

We recognise that an increasing number of people prefer to seek information, advice and solutions via the internet. We already have a strong web presence with www.adviceguide.org.uk (8.8 million visits and 6.5 million visitors in 2008/09).

We will develop our electronic information and advice services faster and further and will ensure that solutions are developed with the needs of the client in mind, including the further roll-out of kiosks, multimedia broadcasts, email and hardcopy factsheets and self-help guides. These will offer solutions and practical assistance at the level the client requires them.

We will offer these services not only for those who are experiencing problems, but also to assist those people who wish to prevent problems from occurring, for example by managing their finances better.

We will develop a comprehensive suite of self-help tools. These include decision trees, diagnostic tools and calculators that assist members of the public in identifying answers to the issues they are facing, evaluating a series of options, or determining whether or not they are in a position to help themselves – prior to seeking telephone or face-to-face support. These tools will ensure that the advice-giving process is consistent with face-to-face advice, whilst continuing to recognise that different users will require differing levels of information and support.

Client outcomes

Clients benefit from tangible outcomes such as increased income from claiming all the benefits they are entitled to, gaining compensation, negotiating manageable debt repayments, writing-off debts or averting threatened homelessness.

We know from a wide range of research (external and by Citizens Advice) that clients achieve personal gains such as: reduced stress, improved health, improved relationships with family and friends, increased confidence and knowledge of how things work.

What we will do

- Establish a virtual call centre-based telephone service called Adviceline. This will cover all of Wales in 2010 and will be rolled out in England from 2010 providing full coverage by 2013.
- Explore opportunities and seek funding to develop a physical call centre to increase the capacity of Adviceline.
- Develop a new case management and customer relationship management (CRM) system which will not only enable the service to work smarter and faster, but enable us to join up our advice work with other advice agencies and with government more easily.

- Develop electronic advice systems including kiosks, email advice and multimedia broadcasts. We will develop public information with Adviceguide (our public advice website), information publishing, interactive and diagnostic tools and specifically in the area of public legal education (PLE), numeracy and financial capability.
- Build on the service's reputation as a respected provider of welfare and benefits advice to become a strategic partner with government, connecting up with the Department for Work and Pensions (DWP) and other departments' systems for direct access to client records.
- Build up the service's relations with other advice agencies and central government to be recognised as the gateway to information, advice and advocacy services.
- Build partnerships and relationships in the voluntary sector that benefit our clients and reduce duplication of advice and support services.
- At a local level position bureaux as focal points for the community; indispensable to local authorities because they work collaboratively to identify and meet local needs, and because they house a range of community and voluntary services allowing residents to drop in for preventative information as well as advice.
- Seek to extend our network on a national, regional and local basis, building on local financial capability forums and the Advice Plus partnerships.
- Develop a new customer charter for the Citizens Advice service that will tell people what we offer. We will measure our delivery against those promises.
- Secure resources to make a strategic assessment of all bureaux premises and support local bureaux to obtain resources to improve their premises for clients and volunteers.
- Expand services to those in greatest need, building on existing good practice.

Resources required

- We will need to secure significant funding to create a physical call centre. We will continue to develop our virtual call centre.
- In order to create an effective customer relationship management (CRM) system an investment totalling £5.4 million will be required.
- Investment totalling £500,000 is required between 2011 and 2014 to transform the content of our public websites.
- To establish a national email service, funding of £630,000 is required in the period 2011-14.
- Our strategic assessment of local bureaux premises is likely to identify significant needs for enhancement. An improvement fund to assist local bureaux to transform their premises could cost around £6 million.

Success indicators	Targets 2014
<p>Key deliverables</p> <ul style="list-style-type: none"> • All bureaux participating in Adviceline. • Effective referral arrangements at local and national level in place with every locality and with major national partners. • All bureaux using gateway model and recording gateway interviews. • Online self-help tools integrated in Adviceguide and advice process. 	
<p>Service outcomes</p> <ul style="list-style-type: none"> • Increase in the number of clients advised. • Increase in use of Adviceguide (our public advice website). • Increased use of face-to-face services by clients from identified groups. 	3.5m 13m
<p>Client outcomes</p> <ul style="list-style-type: none"> • Increased number of client problems solved. • Increased client satisfaction with access to services. • Increased client satisfaction with waiting times. 	90% 90%

We will measure and evaluate the outcomes for our clients from our advice including problems solved, financial gains, improved health, reduced stress and improved relationships. We will also evaluate the use of services by clients from identified groups.

2. Develop holistic and preventative money advice services

Strategic objectives

2.1 To extend our services into generic financial advice and develop our preventative work, including financial capability. To offer comprehensive and preventative money advice services across our whole network.

Rationale

In 2009/10 the service dealt with 1.9 million debt problems. In just one quarter of 2009 our money advisers assisted people to resolve problems with over £400 million of personal debt.

Currently we are able to provide 500,000 people with face-to-face money advice, and we reach 200,000 people a year through local financial capability programmes and campaigns to improve money management skills.

We are delivering local face-to-face money guidance as part of the Financial Services Authority (FSA) pathfinder in the North of England, have developed an innovative pro-bono partnership with the Personal Finance Society (PFS) and contributed evidence from our frontline to improve government and business policy and practice.

What we will do

- Work to maintain our frontline capacity to advise the public.
- Secure additional resources to extend our financial capability services so that all our bureaux are delivering this service and helping over 500,000 people a year. We will continue to fight to ensure that the Financial Inclusion Fund programme continues.
- Seek to play a major role in the delivery of money guidance services when these are rolled out by the government.
- Ask all the funders of specialist money advice and new money guidance services to work in partnership to create joined up services – nationally and locally – which bring together money advice, money guidance and preventative financial capability work so that all our users can have access to all such services. By working in partnership funders will be able to help more people than by working alone.
- Provide, in partnership with the Money Advice Trust and other advice agencies, a comprehensive range of support and training services for debt advisers to help them give the best quality advice to people in financial difficulties.
- Continue to improve and standardise our money advice processes, integrating our money advice toolkit into AdviserNet (our online resource for advisers) and our new customer relationship management system, and developing interactive self-help materials for our web users and referral systems.
- Steer the government strategy for making financial advice and information (FAI) accessible to all members of the community.
- Work with the sector to develop recognised standards for debt advice, money guidance and financial capability training.

Resources required

- Additional investment of £18 million (at £6 million per annum to 2014) will enable Citizens Advice to extend its financial capability services across the entire Citizens Advice network.
- Maintenance of investment in the Financial Inclusion Programme (FIF).

Success indicators	Targets 2014
Key deliverables <ul style="list-style-type: none"> • A national service with all funders of specialist money advice and new money guidance joined up in partnership. 	
Service outcomes <ul style="list-style-type: none"> • More people reached by initiatives delivered by bureaux and regional financial capability forum members. 500,000 • All bureaux involved in financial capability work in their communities. 100% • Expansion of the membership and impact of the 14 regional financial capability forums which bring together all the organisations involved in financial capability in an area. 2,000 • Increase in number of specialist debt advice caseworkers in Citizens Advice Bureaux. 	
Client outcomes <ul style="list-style-type: none"> • Increase in financial knowledge and skills. • Increased access to personal banking and affordable credit. • Reduction in problem debts. • Clients achieve financial gains through benefit, tax/pension credit maximisation. • Clients report improved health and reduced stress. 	

We will measure and evaluate the client outcomes.

3. Extend our policy and campaigning work

Rationale

The Citizens Advice service exists to improve the policies and practices that affect people's lives as well as providing the advice people need for the problems they face. Evidence from our advice work is used to show policymakers and service providers the impact of their decisions, and to advocate for improvements.

We contribute to an extensive range of public policy issues each year. We undertake research, publish reports, respond to consultations, brief Ministers, parliamentarians and Select Committees, and lobby businesses and regulators. We lead campaigns which, increasingly, involve thousands of citizens, directly influencing the policy process, strengthening civil society as a result.

Strategic objectives

3.1 To aid evidence based policymaking and improve service delivery by enhancing feedback to government of client evidence; extend our campaigning work to involve more people and generate more evidence.

We specifically contribute to a wide range of public policy issues in Wales. We respond to consultations, brief Welsh Assembly Government Ministers, Assembly Members and Scrutiny Committees. We lead and partner campaigns directly influencing the policy process on behalf of our clients and citizens across Wales and are a key part of civil society and public service.

Social policy work is a key preventative tool in our advice work and we are ideally placed at the heart of the advice sector to lead on the collection of evidence from a broader base and to use it for social policy influence by leading sector-wide campaigns.

We want to open up access to our evidence database and extend the reach of our campaigns. We will use our already strong position in the advice sector to promote our model of social policy work and extend the reach of our influence. To achieve this, all member bureaux need to be providing data for social policy work on a local, regional and national level and actively engaging in our work to influence policymakers.

We will increasingly offer clients and other organisations the opportunity to get involved in our social policy work, by contributing case study evidence and joining national campaigns. We will use our websites to directly gather evidence from the public, providing increased opportunities for people with stories to tell to engage in our campaigns and to influence social policies.

And we will maintain our capacity for effective national policy and campaigns, including analysis and management information and supporting press, public affairs and communications activities. In particular we will focus on achieving change for those in greatest need, highlighting their causes and cases in all our work.

Client outcomes

In addition to client services, our policy work is far reaching and in 2008/09 we estimated that 9 million clients benefited from areas

of policy that we have directly led on and a further 12 million benefited from areas where we have worked in partnership or made a contribution to.

What we will do

- Expand our evidence collection system so that we are able to draw on evidence from a broad range of advice agencies and members of the public. We will capture more feedback from our website and our new customer relationship management system.
- Improve further the capacity of our network, and the advice sector generally, to inform policy by delivering training and capacity building to workers in the Citizens Advice Bureau network and the wider advice sector.
- Lead evidence-based influencing campaigns involving the entire voluntary advice sector so as to gain real and lasting improvements for our clients.
- Use our new customer relationship management system to communicate with clients about, and manage, our policy and campaigning work.
- Develop and consolidate our statistical reporting services to government and other stakeholders.

Resources required

- We are seeking resources to be able to invest an additional £1.5 million over three years to develop the capacity to lead evidence-based policy influencing, involving the entire not-for-profit advice sector.

Success indicators	Target 2014
Key deliverables <ul style="list-style-type: none"> • Increased policy focus on those in greatest need. • Training, consultancy and support for bureaux on policy work and recording evidence. 	
Service outcomes <ul style="list-style-type: none"> • Continued high ratings from MPs, Peers and key stakeholders on the value of the service. • Continued high levels of public recognition and trust of the service. • Increased and improved evidence collected from clients. • Increased engagement by bureaux on campaigns at a local and national level. 	<p>90%</p> <p>50,000</p> <p>100%</p>
Client outcomes <ul style="list-style-type: none"> • Citizens benefit from policy work. 	5m

We will survey MPs, Peers, key stakeholders and the public to evaluate our services.

4. Strengthen our network

Rationale

We currently have 390 member bureaux providing services in 98 per cent of all local authorities in England and Wales.

Our desire is to become more responsive, providing clients with greater choice and more routes in to the advice-giving process – keeping them at the heart of everything we do.

The Citizens Advice service and the bureaux network is constantly adapting to changing funder requirements around calls for greater efficiency, service delivery standards, the reporting of outcomes and more. Looking ahead, we will adapt to a pressure to reduce costs whilst still demonstrating an ongoing response to these expectations.

Strategic objectives

4.1 To consolidate our position as the leading advice agency in England and Wales by maintaining our geographic spread, strengthening governance, management and leadership and improving the quality of our services.

Citizens Advice prides itself on providing quality advice and information for the full benefit of the public. We are the only national advice provider that systematically and comprehensively audits the quality of advice delivered by its members to the public, ensuring we are trusted and respected.

We will continue to research and provide best practice for effective governance and management and develop standardised systems and provide support to bureaux where there are problems.

An effective network of local advice-giving organisations

The bureaux network has huge strengths from being close to the public, its local funders and supporters. The local community nature of the service is part of the appeal for many of our volunteers. The network also has huge strengths from a national perspective and public awareness of the service is high (at 96 per cent).

Our advice covers a large range of key issues within society and our clients can have their lives transformed by a visit to a bureau. The improved health and confidence that clients often report after receiving advice, reduces strain on local health services and increases community cohesion.

Benefits, debt and employment continue to be the categories of advice that are given most frequently but we also provide information and education across many other areas.

Over the next four years, however, members will need to make some significant changes to their operations. The emergence of commissioning, the move to re-tender all Legal Services Commission (LSC) contracts in 2010 and pressure on public expenditure means that many bureaux will need to make changes to their structures so as to respond.

The bureaux network will continue to strive to maintain maximum coverage across England and Wales, but a reduction in the number

5. Promote partnerships and build support

Rationale

Partnership will be critical to helping us achieve our 2014 vision for the Citizens Advice service. We will cultivate and develop stronger partnerships in advice delivery and our partnerships with government, and work to maintain and broaden our supporter base.

Citizens Advice will continue to promote the service locally and nationally as an independent charity – to ensure clients do not see bureaux as being less impartial because we work closely with government. We have a strong record of collaboration and partnership working with other voluntary sector providers. Working as a gateway, providing co-located services or working in advice networks or CLACs or CLANs, we will continue to work with others to provide better services to clients.

Strategic objectives

5.1 To become a primary partner for national and local government in tackling poverty, helping people into work, improving financial capability, building more cohesive communities and enhancing health.

National government

To date, the service has demonstrated its ability to act as a key delivery partner for national government with the Financial Inclusion Fund (debt advice), the Additional Hours of Advice (AHA) project around increased opening hours and Money Guidance. By working in partnership with departments such as Department of Work and Pensions (DWP) we will be able to improve services for clients.

At a national level, this will require building and sustaining relationships with key stakeholders such as the Local Government Association (LGA), the Department for Communities and Local Government and the Audit Commission.

Local government

Local authorities provide the core funding for the majority of bureaux and in 2008/09 they provided £70 million out of £153 million total bureaux funding. The majority of bureaux have strong relationships within their local authority with many having an active role with their community.

However, as funding becomes tighter it will be essential for all bureaux to maintain and develop these relationships.

Voluntary sector

The Citizens Advice service already has extensive partners and supporters across government and local government. We also work with charities, like The Royal British Legion and Macmillan Cancer Support to deliver specific advice services. And our partnerships with corporate supporters including Prudential, Barclaycard and Nationwide are helping us to develop new financial capability services.

What we will do

To establish more effective partnerships in advice delivery we will:

- Establish national partnerships and referral protocols and systems to support telephone and electronic advice services.
- Create strong working relationships with other advice agencies to become a gateway to advice. We will focus on joining up with central government as a true partner as well as developing a partner engagement strategy with key messages.
- Broker national partnership arrangements that can be implemented at a local or regional branch level, and promote partnership development by local Citizens Advice Bureaux.
- Nationally we will establish strategic partnerships with equality and advice organisations to improve discrimination policy, campaigning and advice outcomes.

To establish more effective partnerships with government and local government we will:

- Ensure we have the capability to work in partnership with government and local councils to deliver electronic services by investing in a customer relationship management system and ICT systems that meet current government standards for data security.
- Offer to work in partnership with government to deliver a 'poverty-busting' programme of benefit take-up which could result in an improvement in 31,500 people's incomes per annum of, on average, £2,000 each, or £189 million in total over three years.

Resources required

- We will invite government to enter into a strategic benefit take-up partnership with Citizens Advice. An investment of £24 million (£8 million per annum) over three years could create 100 local projects, leading to the benefits outlined above.

Success indicators
Key deliverables <ul style="list-style-type: none">• Maintained central government funded services.• Sustained local authority support and funding of bureaux.
Service outcomes <ul style="list-style-type: none">• National and local partnerships with formal referral arrangements in place.• Citizens Advice Bureaux recognised and performing the role of gateway to national and local advice provision.• Sector-wide advice quality framework.

We will measure and evaluate service outcomes.

6 Enlarge and develop our workforce

Rationale

We currently have a workforce of 27,000 people – 21,000 of whom are volunteer advisers, trustees or working in other roles in local Citizens Advice Bureaux. Many of our volunteers and paid staff remain with us for more than five years which means we have a substantial wealth of experience to draw on, enhancing the quality of our services. In order to have the capacity to field an increase in enquiries we will need to build up our workforce of volunteers and paid workers.

The estimated value to the economy of volunteering with Citizens Advice is £86 million today. Every year 30 per cent of all our volunteers move on to new things – 33 per cent of those to take up paid employment and 8 per cent go into full-time education/training, meaning that volunteering with us is a pathway to work. If we receive the required additional resources, we will be able to answer 2.5 million telephone calls and advise an additional 1.25 million people per annum over the telephone and face-to-face from local bureaux, and expand our financial capability services so that we help 500,000 people a year.

We will ensure our volunteers and paid workers receive training to enable them to maximise their capability. Our managers will have the skills and knowledge to lead effective local services. We will create new roles for advisers to deliver the gateway process effectively.

Strategic objectives

6.1 We will build a robust and diverse workforce. We will increase the size of our volunteer workforce to meet the increase in client numbers and maximise the impact of our volunteers.

Volunteers

Government recognises the power and value of volunteering. It is through volunteering that people build relationships, networks and bonds of trust. We also know that volunteering is widely recognised as having an impact on the 'health' of a community. It raises aspirations, encourages community participation and is a hallmark of strong, active and empowered communities.

Volunteers will continue to be critical to the successful delivery of services and the development of social policy within the Citizens Advice service. And to help us deliver a 2014 vision – we will need to recruit, train and retain an additional 5,500 volunteers in public-facing advice-giving roles.

We know that the majority of volunteers value the experience of working with the CAB service. This in itself strengthens the brand. We know that many volunteers find a new sense of purpose and self-esteem from working with the CAB service. We need to leverage this to increase the opportunities to volunteer.

What we will do

- If we receive the required funding we will recruit, train and support new volunteer advisers from 2011 to 2014 to expand and replenish our volunteer adviser workforce, which will have

increased from 13,400 to 18,900 by 2014.

- Broaden the range of roles volunteers can play in the service, speed up training, provide more training and support and develop clear volunteer 'career paths'.
- Align training with key relevant qualifications such as the NVQ scheme.
- Maintain and update the skills of our extensive workforce of paid workers and specialist advisers with a comprehensive range of training, specialist support and continuing professional development (CPD) initiatives.
- Run a leadership programme for local advice service leaders, managers and trustees aimed at equipping them with the skills and knowledge to lead effective local services and help us deliver our ambitious vision for the Citizens Advice service.
- Enable all training courses to be fully bookable online by bureaux and external agencies, extend the range of online e-learning resources and create a learning management system to support our entire workforce.
- Improve career development options for volunteers along with the creation of new qualifications, faster training, and highlighting volunteering as a clear route back to economic inclusion.

Resources required

- We are seeking resources to invest £1 million over three years in delivering a leadership development programme for our 5,000 local trustees and senior staff.
- We will need to generate additional resources to recruit and train volunteers. Citizens Advice will be making a national bid for funding to external agencies.

Success indicators	Target 2014
Key deliverables <ul style="list-style-type: none"> • Training programme for leadership development and new advice roles. • A service wide recruitment system. 	
Service outcomes <ul style="list-style-type: none"> • A well trained and diverse workforce providing quality advice. • An increase in volunteer capacity. • An increase in the number and range of roles. • A strong leadership community across the CAB service. 	5,500
Volunteer outcomes <ul style="list-style-type: none"> • Increase in skills for volunteers leading to further education and employment opportunities. • Volunteer satisfaction with their roles. 	90%

We will measure and evaluate service and volunteer outcomes.

7. Make equality and diversity a part of everything we do

Rationale

Our equality and diversity strand cross cuts everything we do. We have a FAIR strategy (fair, accessible, inclusive, relevant) that delivers our commitment to develop and deliver a range of discrimination advice and policy services in partnership with others.

If we challenge discrimination effectively, we can prevent future abuses, as well as empowering some of the most disadvantaged people in society to realise their rights. The creation of the Equality and Human Rights Commission has provided a unique opportunity to become part of a coalition working to challenge discrimination and promote equality and human rights.

Strategic objectives

7.1 We will increase the availability and quality of discrimination advice and social policy work. We will increase the diversity of our people and increase their knowledge of equality, diversity and human rights issues. We will promote our common understanding of greatest need and ensure this informs service and policy planning and delivery.

Nationally we will establish strategic partnerships with equality and advice organisations to improve discrimination policy, campaigning and advice outcomes.

Having a diverse leadership, which is knowledgeable about equality, diversity and human rights is critical to the legitimacy and credibility of the Citizens Advice service in our role as policy influencers, campaigners, service providers, employers and volunteer agencies. Currently the percentage of disabled people in volunteers and trustee roles is eight per cent and in staff roles is six per cent. The percentages of BAME people in volunteer roles is ten per cent, staff roles is eleven per cent and trustee roles is six per cent.

Tackling the lack of diversity is not a simple issue that can be addressed only, for example, by policies or advertising in the right places. Therefore a concerted programme of action needs to be developed both for Citizens Advice and to support bureaux.

The Citizens Advice service empowers people to exercise their rights and resolve their problems. It helps them build skills and confidence and play an active role in their community, through volunteering and in other ways. And it uses client evidence as a force for the wider good, improving local and national policy.

We know that many of those who we work with are among 'the most powerless'. Many face multiple disadvantages, with for example, poverty or social background combining with their race, disability or sexual orientation to make a complex set of problems and barriers to overcome.

What we will do

- Increase the availability and quality of discrimination advice and social policy work.
- Increase the diversity of trustees and management and increase their knowledge of equality, diversity and human rights issues.
- Enable volunteering to be a means of returning to work by

developing training courses that deliver accredited qualifications to enable the service to impact on assisting the return to work programme.

- Promote our common understanding of greatest need across the service and ensure this informs service and policy planning and delivery.
- Ensure working with clients in greatest need is built into competencies and advice-giving tools for key roles.
- Demonstrate our contribution to achieving local and national government targets related to greatest need and deprivation through analysis of our evidence base and undertaking new research.
- Bid for funding from health budgets to develop our work in this area.

Resources required

- This will be delivered with our core grants and through new funding opportunities.

Success indicators	Target 2014
Key deliverables <ul style="list-style-type: none"> • Policies and practices in place. 	
Service outcomes <ul style="list-style-type: none"> • Recognition by key stakeholders as an organisation that makes equality and diversity a part of everything we do. • The percentage of bureaux managers and trustees who are disabled and from BAME communities increases. • The number of discrimination cases identified by bureaux increases. 	12% 10%
Client outcomes <ul style="list-style-type: none"> • Increased awareness of bureaux as places to seek advice. • Clients in greatest need receiving quality advice, leading to better standards of living. 	

We will measure and evaluate service and client outcomes.

8 ■ Provide the systems and resources to deliver our strategy

Strategic objectives

8.1 To transform our ICT infrastructure, providing a set of integrated tools to support service delivery. To deliver improved services to bureaux and efficiencies through offering shared services and common systems. To develop best practice in information assurance.

Rationale

To create a quality service for our clients and achieve service-wide efficiencies, we will need effective systems and resources in place to enable successful delivery of the strategy. This will include generating new sources of income.

There are a number of functions and activities that cut across all the strategic priorities and support the organisation in achieving the objectives.

The service needs to ensure that all activities are aligned and that joint working is a primary theme within Citizens Advice.

Our new strategic ICT partnership with Logica will provide focus on business transformation and an integrated customer relationship management system is essential to our advice provision.

As a part of our grant funded relationship with the Department of Business Innovation and Skills (BIS), and together with other strategic partnerships being developed with the DWP, the LSC and other organisations, Citizens Advice will be required to achieve at least a minimum level of Information Assurance (IA) compliance to the following security standards:

- Security Policy Framework (Cabinet Office)
- HMG IA Standard No. 6 (part of SPF)
- ISO 27001

to ensure that the confidentiality, integrity and availability of all organisational assets are maintained and preserved to an appropriate level.

We will look at better ways of working internally as well as what services we offer bureaux. We will seek partnership opportunities that can either reduce costs or improve the quality of services. Where appropriate, we will consider outsourcing responsibilities.

We will improve our service offering to bureaux. We will establish a 'procurement portal' which will collate all services that we can offer bureaux. Within this portal, we will offer deals which we have negotiated with suppliers on behalf of the bureaux network.

In terms of finance the years ahead will be a difficult period. While there are opportunities for growth, there is a risk that our core grant will decrease. Over the period, we will ensure that the organisation is financially resilient to change but has a robust reserves policy that allows for all realistic scenarios. We will also aim to diversify our income streams to lower the reliance on one funder.

There is a continued need to promote the value of our service as a charity and brand to all stakeholders to support our strategy.

This includes proactive and reactive media coverage, external communication and events.

What we will do

- Develop a customer relationship management system that will enable us to achieve efficiencies within ICT services.
- Provide effective and strategic communication promoting the service and brand through continued media and external communications activities.
- Manage the financial framework and resource allocation effectively.
- Focus on the responsibilities of support functions with a view to identifying and realising operational and financial efficiencies.
- Review all existing practices which may impact upon the security of our organisational data against minimum government standards. Change policies and practices to achieve compliance with the IA standards.
- Explore new areas of income generation through fundraising and the sale of goods and services.
- Establish a joint procurement system with bureaux and seek to offer an increased range of shared services to the network.

Success indicators
Key deliverables <ul style="list-style-type: none">• Customer relationship management system implemented.• A strategic financial framework.• Compliance with Information Assurance standards.• New income streams established.
Service outcomes <ul style="list-style-type: none">• Efficiencies delivered through shared services.• Increased use of standardised systems.• Stakeholder awareness of the value of the brand maintained or increased.

9. measures for success

Our strategy includes areas where we have set targets that will be achieved by March 2014 which we will measure. It also includes outcomes that do not have a specific target but where we will evaluate and report on the outcomes. For example clients typically report improved health, reduced stress and many will be financially better off. However, it is not meaningful to set specific targets for these.

Targets to be measured

Area	Measure	Target 2014
Client contacts	Visits per year to Adviceguide	20m
	Contacts with clients advised face-to-face	4m
	Calls to Adviceline	2.5m
	Email contacts	500,000
Unique clients	Unique clients using Adviceguide	13m
	Unique clients advised face-to-face	2m
	Unique clients using Adviceline	1.25m
	Unique clients using email	250,000
Gateway	Bureaux use the gateway model and record all gateway work on CASE	100%
Adviceline	Bureaux participation in Adviceline	100%
Client satisfaction	Client satisfaction with services	90%
	Client satisfaction with access to phone and face-to-face	90%
	Client satisfaction with online services	90%
	Client satisfaction with waiting times	90%
Preventative money advice services	Bureaux involved in financial capability	100%
	The percentage of financial capability clients reporting improved knowledge and skills	90%
	The number of individuals reached by initiatives delivered by bureaux and regional financial capability forum members	500,000
Policy	People whose lives are improved by policy work	5m
	MP and Peers ratings of effectiveness of charities	Top 5
	Public recognition	90%
	The number of bureaux engaged in policy work	100%
	The number of policy evidence forms submitted	50,000
	The percentage of evidence forms at acceptable quality	80%
Network strength	Services available to clients in England and Wales LAs	100%
	The percentage of bureaux meeting a recognised quality standard	95%
	Bureaux income	£200m
Developing our workforce	Additional number of volunteers	5,500
	Leadership Development programme delivered to managers	90%
	Volunteer satisfaction with their roles	90%

Area	Measure	Target 2014
Equality	The % of BAME volunteers and staff	12%
	The % of disabled volunteers and staff	10%
	The % of BAME bureaux managers and trustees	12%
	The % of disabled bureaux managers and trustees	10%
Financial and other	The minimum level of unrestricted reserves for Citizens Advice	£2.5m
	Stakeholder and public favourability	85%
	Overall bureaux satisfaction with Citizens Advice	90%

Outcomes and outputs to be evaluated

Clients in greatest need	Increase in face-to-face clients that meet the definition of greatest need	We will analyse our data to identify the use of services by clients from identified groups
Client outcomes	Increase in problems solved Improved financial position Reduced stress Improved health Increased access to banking and credit Improved knowledge and skills	We will use surveys with clients on a sample basis to evaluate these outcomes
Partnerships and referrals	Formal national referral arrangements in place Bureaux have local referral arrangements and work in formal partnership with third parties Clients referred from Adviceline to third party providers Bureaux services co-located with other providers	We will evaluate the success of partnerships We will survey clients referred to third parties on a sample basis We will evaluate the range and success of co-located services
CRM	Full use of CRM system by bureaux CRM system used by external agencies	We will monitor and evaluate the use of the CRM system by bureaux and other agencies

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