

# **CITIZENS ADVICE HART DISTRICT**



**Business Development Plan**

**2009 - 2012**

**Our aim:**

- **to provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities**
- **to improve continuously the policies and practices that affect people's lives.**
- **to promote equality and fairness in the community we serve**
- **to provide the advice people need for the problems they face**

**Our principles:**

- **to value and respect diversity**
- **to promote equality**
- **to challenge discrimination**
- **to work together and value the contribution of colleagues**

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## Executive Summary

Citizens Advice Hart (the Charity) continues to meet the challenge of ensuring that the services provided are maintained at the high level of client expectation and to the quality required by Citizens Advice and the Trustee Board.

This plan builds on the achievements to date, reflecting the needs of the community and the ongoing improvements from last year's plan whilst addressing the impact of the changing financial climate and new Citizens Advice initiatives.

The co-operative support of our volunteers, staff, management and trustees is critical to the continued delivery and development of our services and this contribution is appreciatively acknowledged

**Key objective for 2009/10 is the continued development of our services for which we will focus on the key areas of:**

- **Funding – increasing and securing our income**
- **Recruitment – increasing the number of our volunteers**
- **Access to advice – Gateway, Single Telephone Number (STN) & other measures**
- **Common practices across the Charity – working together**
- **Public Relations – increasing our profile in the community**

The coming year will see the Charity taking part in the introduction of the Gateway Assessment approach to service delivery. The assessment is a 'triage' system to determine the next step that needs to be taken in order that the clients' problems can be addressed. It is expected that, by adopting this approach, more people will be helped without having any adverse effect on the quality of the service delivery.

Citizens Advice is evaluating systems to implement a Single Telephone Number and the Charity will be involved in the project to the extent that appropriate resources are made available as it develops and is progressively introduced nationally through 2009 and 2010.

At the beginning of the new financial year, the Board believes that the foundations are in place to ensure continued progressive improvements in the delivery and quality of the services offered by the Charity. There are tough challenges ahead and our aim is to help more people, particularly those in the greatest need, more effectively across the whole of our area.

## **Citizens Advice - Hart District**

Citizens Advice – Hart District is a Charity and a company limited by guarantee and is regulated by the Companies Acts, the Charity Commission and Citizens Advice.

It delivers advice and related support services across Hart District and Surrey Heath to anyone who wishes to access its services. It is able to provide advice on matters such as benefits, housing, debt, consumer rights, employment, immigration, equality and family matters. Advice is mainly delivered through trained volunteers who are supervised and supported by a paid management team and governed by a Board of Trustees. Related support services include case management, advocacy and outreach.

In addition, the Charity aims to influence and change local and national policy through its Social Policy work. This is achieved by working in partnership with other bureaux and Citizens Advice nationally to collate and identify Social Policy issues and then independently, or in partnership, lobbying to ensure change and raise awareness.

## **Purpose**

The key purpose of this Business Development plan is to underpin the systematic, ongoing approach to deliver effective governance and management of the Charity's services to the community. It specifically aims to enable the bureau to:

- respond to community needs
- have clear goals and avoid 'mission drift'
- use resources efficiently and to effectively deliver the service
- anticipate future developments rather than resort to crisis management
- identify and obtain additional resources
- induct and train trustees, staff and volunteers
- promote and publicise the services
- provide evidence for all of the above.

## Summary of Achievements

In the twelve months from April 2008 our team has achieved the following:

- Membership of Citizens Advice Hampshire (CitAH) and the resultant opportunity to contribute to the Macmillan and Advice Plus II projects that could have positive financial benefit.
- Robust financial accounting and control systems under the management of the new Finance and Funding Committee.
- Client satisfaction survey – 98% satisfied.
- 95% success rate for disability benefit applications (Nationally only 75%).
- Successful Citizens Advice audit result and all corrective actions completed.
- Disabled Access Audit completed.
- Robust Social Policy Programme in place.
- Social Policy Project (“Access to Hostel Accommodation for Homeless people across Hampshire) completed by Citizens Advice – Hart for CitAH.
- Profile of the Charity raised with local organisations and Citizens Advice Hampshire.
- Trustee induction and training plan in place.
- Upgrade of software and hardware systems.

## Challenges

- The future outlook is one of a more competitive and challenging environment with a growing demand for our services
- Pressure on Local Government finances
- Tendering and commissioning
- Alliances and partnerships, including Community Legal Advice Centres (CLACS) and Networks (CLANS)
- Current financial crisis and predicted recession will impact potential funders

To meet the challenges the Charity must:

- Be prepared for the new environment
- Strengthen relationships with existing and potential funders and partners
- Improve access by implementing Citizens Advice national initiatives and other improvement programmes. The introduction of Gateway Assessment and subsequently the Single Telephone Number scheme are the primary challenges.

With the aim to:

- Increase responsiveness and increase the efficiency and capacity of each bureau
- Enable partnership working with other organisations

## Client Services

Our statistics illustrate that welfare benefits are still a major client issue. However, debt work is a very close second with a greater demand on the advisors for debt management schemes, advice on bankruptcy and independent voluntary arrangements.

Employment issues are increasing sharply with redundancies becoming increasingly frequent.

Hart has been declared to be one of the wealthiest districts in the UK. This has brought with it a wave of debt problems due to high housing costs and irresponsible lending, which has to be balanced with irresponsible borrowing. More financial education is needed and a financial literacy programme has been delivered in the community. Opportunities to deliver this to schools and colleges are being developed.

Clients' financial and emotional outcomes, particularly in relation to welfare benefits and money advice are pro-actively recorded as a means to assist us in improving the services we provide, enable us to illustrate to funders the effectiveness of our service and highlight social policy issues.

We work closely with the Housing departments of Hart District and Surrey Heath delivering an advice and information surgery to young homeless aged between 16 and 25 years with a local connection. The service includes support in finding accommodation, education and welfare benefits.

Partnership working and funding opportunities are maximised wherever possible, in order to continuously improve and expand our services

The Charity is committed to delivering advice outside its main premises to meet the needs of those unable to attend the bureaux. We will continue to look for resources and opportunities to expand these services, particularly where high levels of deprivation have been identified. Work in the County Court, Life House, Heathlands, RAF Odiham and the commitment to future home visiting services underline this commitment.

The website, [www.citizensadvicehart.org.uk](http://www.citizensadvicehart.org.uk), outlines the services that we offer with information on volunteering.

## Trustee Management

Management of the Charity is directed and monitored by the Trustee Board that meets formally four times per year. In addition to the Chairman, Secretary and Treasurer, specific responsibility for Public Relations, Funding, Recruitment, Health and Safety, Strategic Planning and the Annual General Meeting is assigned to nominated trustees.

**The Management Committee** meets regularly and provides continuity of stewardship of the Charity's activities on behalf of the Trustee Board by:

- Monitoring and recording the use of funds.
- Adherence to Company and Charity Law regulations.
- Management of the business risks.
- Recommendation to the Trustee Board of revised policies and procedures including the use of IT.

**The Personnel Committee** oversees the recruitment, retention, remuneration, employment and development of Trustees, District Manager, Bureau Manager, Staff and Volunteers and is convened whenever there is an issue or important decisions or approvals required – e.g. salaries and appraisal reviews.

**The Membership Service and Development Committee** monitors compliance with Citizens Advice membership. Drafts the Business Development Plan for consideration by the Board and supervises the development and delivery of appropriate services for clients. It prepares the risk analysis and co-ordinates the management of health and safety. The committee meets regularly with frequency governed by the issues/status of projects/strategies.

**The Finance and Funding Committee** reviews the budget, reflecting the aims of the Business Development Plan, for consideration and approval by the Board. The committee monitors income and expenditure against agreed Budgets and recommends corrective action. It supervises the development of diversity and bids for funds. The committee meets regularly with frequency governed by the issues/status of projects/strategies

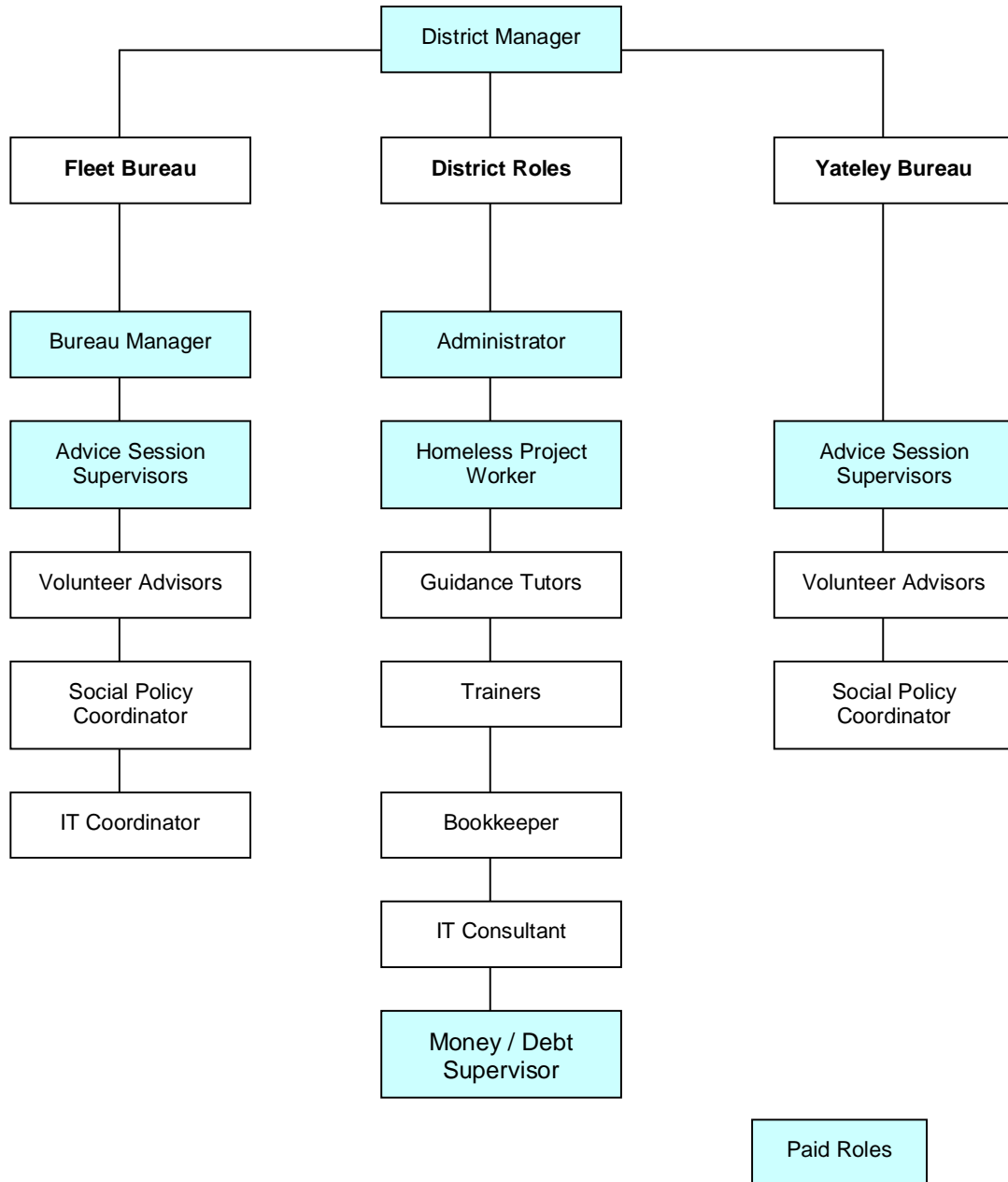
Small project teams, where appropriate, are established with clearly defined responsibilities and reporting to the relevant committee of the main Board.

## **Management and Staffing**

Day to day operations and service delivery is the responsibility of the District Manager backed by the support of the Trustee Board. The organisational structure, comprised of a mixture of paid staff and volunteers is kept under review and matched to the service needs, funding constraints and the ability to recruit, train and retain volunteers.

The current organisation structure is shown overleaf.

## Organisation



## **Equal Opportunities**

The Charity is committed to delivering the FAIR (Fair Accessible Inclusive Relevant) equality and diversity strategy for the Citizen's Advice service.

We are all different and yet we all share a common humanity. Our common humanity makes us equal in worth and rights. The visible and non-visible differences between people make our diversity.

Equality and diversity are about us all: men and women, white and black, disabled and non-disabled, sexual orientation, people of all ages, all classes, all religions and none.

People are our core 'business' and people are equal and diverse. Therefore taking equality and diversity into account is essential if we are to carry out our core business well.

Our aim is to provide a service to people of all communities across Hart with the knowledge that they can rely on the our service for high quality advice, that is accessible, inclusive, and responsive to their needs; so that all our work is relevant to and valued by all parts of the local community, including people who experience discrimination and exclusion.

## **Premises**

The Charity's premises at Fleet and Yateley are provided and maintained under a lease by HDC. The Council retains responsibility for the maintenance of the buildings, surrounding grounds and car parking provisions whilst the Charity has responsibility for the internal fabric, cleaning and day to day operational management, ensuring the premises remain a safe and healthy place in which to work and serve the public.

## **Information and Communication Technology**

The CASE recording system together with the Advisernet information database are the key technology tools that are utilised in the delivery of the bureaux services. Information and Communication Technology will continue to play an increasing and important role in bureau work, both from a national Citizens Advice perspective and with local delivery of services.

The continued delivery of IT for the benefit of the staff, volunteers and our clients requires a process of rolling replacement of the installed hardware to keep pace with the extra demands for capacity.

In order to support the continuing integration of the bureaux, more use has to be made of the VPN concept in the pursuit of a district network system that will also provide an internal email facility. Solutions to these requirements are dependent on Citizens Advice nationally who are aware of both requirements, but as yet have no firm plans to implement solutions.

## **Major Business Objectives:**

### **Funding – increasing and securing our income**

The ability to meet the increasing demand for our services is limited by the funding that we can attract and secure, whether for core services or project specific. The development of secure sources of funding from a broad base is critical to the continuation and future development of our services.

The Service Level Agreement (SLA) and associated funding agreed with Hart District Council (HDC) for the three year period is due to expire in April 2010.

Citizens Advice - Hampshire (a consortium comprising Trustees from bureaux across the County), offers the potential opportunity for extra funding.

### **Recruitment – increasing the number of our volunteers**

The ability to meet the increasing demand for our services is limited by the number of volunteers that we can attract, train and retain. A cohesive strategy is required to address the future manpower needs against the service development requirements and matched to accommodation restraints and funding limitations.

### **Access to advice – Gateway, STN & other measures**

The ability to readily provide access to advice on demand against increasing needs and funding constraints place ever more pressure on the need for efficient and effective means of delivery. The forthcoming gateway initiative and single telephone number projects offer the means of improving access although other measures, such as opening times warrant consideration.

### **Common practices across the District – working together**

The ability to work as a single team across the District becomes ever more necessary as the growing demands on our services reinforces the need for efficient and effective means of delivery. Some progress has been achieved since the amalgamation of the Fleet and Yateley bureaux but the expectation is for further improvement to support the development of new services and the use of technology in managing the interchange of information and flexibility of delivery.

### **Public Relations – increasing our profile in the community**

The ability to meet the increasing demand for our services is limited by the number of volunteers and funding that we can attract. A key component is the public perception of the bureaux and their relevance to the local community. Resource limitations currently restrict public relation activities; they are poorly focused and inadequately managed. This impacts negatively the ability to secure new funding, new recruits and the promotion of existing services to a wider client base and the identification of new service needs.

**Financial Forecast 2009-12**

	Budget 2009-2010					Plan 2010-2011					Plan 2011-2012				
	Total Core £	Restricted			Grand Total £	Total Core £	Restricted		Grand Total £	Total Core £	Restricted		Grand Total £		
		Xhours £	M'millian £	Other £			M'millian £	Other £			M'millian £	Other £			
<b>INCOME</b>															
Hart Grant	145230			145230	148861			148861	152582			152582			
Donations	9000			9000	15000			15000	20000			20000			
Other	5000	35105	16500	82495	5000	25890	38000	68890	5000	25890	38000	68890			
<b>Total Income</b>	<b>159230</b>	<b>35105</b>	<b>16500</b>	<b>236725</b>	<b>168861</b>	<b>25890</b>	<b>38000</b>	<b>232751</b>	<b>177582</b>	<b>25890</b>	<b>38000</b>	<b>241472</b>			
<b>EXPENDITURE</b>															
Salaries	116671	22208	25780	185603	127080	20992	22409	170480	130892	21040	26282	178215			
Other staff	6200	500	2150	9345	6355	500	2200	9055	6514	450	2250	9214			
Equipment	122871	22708	27930	194948	133435	21492	24609	179535	137406	21490	28532	187428			
cit advice	1700	2000	2000	5700	1700	2000	2000	3700	1700	2000		3700			
Other admin costs	6500			6500	6750			6750	7000			7000			
	14200		8150	23750	14555	1398	8200	24153	14919	1400	8500	24819			
Operating Costs	22400	2000	3400	35950	23005	3398	8200	34603	23619	3400	8500	35519			
Establishment costs	10250		1050	11300	10506	1000		11506	10769	1000		11769			
Governance costs	1800			1800	2000			2000	2100			2100			
Depreciation	5400			5400	5400			5400	5400			5400			
Indirect Cost allocation	-20596	10397	10199	0	-8200		8200	0	-9400		9400	0			
<b>TOTAL COSTS</b>	<b>142125</b>	<b>35105</b>	<b>46278</b>	<b>249398</b>	<b>166146</b>	<b>25890</b>	<b>41009</b>	<b>233044</b>	<b>169894</b>	<b>25890</b>	<b>46432</b>	<b>242216</b>			
<b>SURPLUS(-)/DEFICIT</b>	<b>17105</b>	<b>0</b>	<b>29778</b>	<b>-12673</b>	<b>2715</b>	<b>0</b>	<b>-3009</b>	<b>-294</b>	<b>7689</b>	<b>0</b>	<b>-8432</b>	<b>-744</b>			
<b>RESERVES</b>															
At start of Year	76300		44200	120500	93404.98775		14422	107827	96120		11413	107533			
Surplus/(-) Deficit	17105		29778	-12673	2715		-3009	-294	7689		-8432	-744			
<b>Balance at end of year</b>	<b>93404.99</b>		<b>14422</b>	<b>107827</b>	<b>96120</b>		<b>11413</b>	<b>107533</b>	<b>103808</b>		<b>2981</b>	<b>106789</b>			

