# report to the

# board of aberdeen citizens advice bureau



# Strategic Business Plan 2019-2024

## **Report Owner: Policy and Resources Standing Committee**

Version 4

9 July 2019

**Report to the Board of aberdeen citizens advice bureau**

**strategic business plan 2019-2024**

# Background

Aberdeen Citizens Advice Bureau (ACAB) developed a 3 year Business Plan in 2017. The lifetime of that plan ceases in September 2019. This paper replaces the previous document and details the Strategic Business Plan of the Board of ACAB for the next five years, 2019-2024.

# the organisation

## **History**

Aberdeen CAB was founded on the 4 September 1939, and served the urgent wartime needs of the people of Aberdeen. The bureau did not operate full time and did not occupy its own premises, working mainly from a number of locations including the City’s Music Hall. It achieved much and became an established organisation offering valuable advice and direct support to the citizens of Aberdeen.

Since then it has operated and outgrown a series of premises until its move in November 2004 to its current purpose designed building in Aberdeen’s Union Street.

## **A Modern Bureau**

The work load of the ACAB has always been high and enquiries have been increasing in complexity.

Today, Aberdeen Citizens Advice Bureau provide free, independent, confidential and impartial advice on a large number of issues to any citizen of the City of Aberdeen. The Bureau works with governmental and non-governmental agencies and organisations to secure funding and solve problems in an integrated and collective manner.

ACAB is an independent Scottish Charity (number SC009674) and a member of the Citizens Advice Scotland network. It is a company limited by guarantee administered by a Board of Directors. The Board consults on the policies and operation of the bureau with the paid staff, volunteers, funders, related statutory and voluntary organisations and clients through regular questionnaires. The Board has a wide range of business, professional and political experience and includes paid and voluntary staff and Aberdeen City Council members.

The organisation occupy a main advice centre at 41 Union Street, Aberdeen and has a number of outreach centres:

**Debt & Benefits Advice Outreach**

* Seaton Community Project, Seaton Place East
* Torry Medical Centre, Oscar Road
* Mastrick Community Centre, Greenfern Road
* Woodside Community Centre, Great Northern Rd
* Northfield Community Centre, Byron Square
* Manor Park Community Facility, Danestone Circle
* Powis Community Centre, Powis Circle

**Macmillan Cancer Centre Project**

* Roxburghe House, Ashgrove Road

**Hospital Outreach**

* Calsayseat Medical Practice (for clients of the Medical Practice)

ACAB has also a part time telephone advice for Aberdeen citizens. This service operates Monday to Wednesday 9:30am to 12.30pm.

In 2018-19 ACAB had 20,607 client contacts. The most common issues were benefits, debt and employment. 59% of our clientele declare disabilities, 33% are between 45 and 59 years old, and 54% of clients are female..

In the same period the Bureau also managed to gain £5,071,510.70 on clients’ behalf in respect of refunds, additional benefit income, written off debt, outstanding wages and tribunal settlements

# Statement of purpose

Aberdeen Citizens Advice Bureau shares the aims, principles and values the Citizens Advice Scotland (CAS) of which it is a member.

# Mission, Aims, Principles and VAlues

## **Mission**

We provide free, independent, confidential and impartial advice and information to the citizens of Aberdeen and its environs that is accessible and tailored to meet the needs of the community regardless of disability, gender, race, sexual orientation, age, transgender, religion and belief.

## **Aims**

* To ensure that individuals do not suffer through ignorance of their rights, responsibilities or of the services available or through an inability to express their needs effectively.
* To provide a quality service with integrity, trust and good stewardship, through a team of trained volunteers, paid staff and experienced board members.
* To exercise responsible influence on the development of social policies and services, both locally and nationally

## **Principles**

* **A free service** – ACAB provides information, advice and assistance free of charge. The Bureau does not provide free legal representation.
* **Confidentiality** – ACAB provides confidentiality to clients. Nothing learned from clients, including the fact of their visits, will be passed on to anyone outside the CAB service without express permission of the client.
* **Impartiality** – The service provided by ACAB is impartial, it is open to all, and is regardless of any subjective opinion as to whether or not the client is deserving.
* **Independence** – The service provided by the Bureau is completely independent.
* **Accessibility** – ACAB aims to make its services accessible to all by using premises which are centrally located, easy to enter, welcoming in appearanceand generally open between the hours of 9.30am and 3pm, Monday to Friday.
* **Effectiveness** – ACAB judges the effectiveness of its activities by the extent to which it meets its clients’ needs.
* **Community accountability** – ACAB is accountable to the community that it serves.
* **Client’s right to decide** – ACAB recognises that those who come to them have a right to set their own objectives and to decide whether or not to accept the advice and assistance offered to them.
* **A voluntary service** – ACAB operates on the principle that first and foremost it is a voluntary service of advice and assistance provided by individuals serving their communities in a formal, unpaid capacity.
* **Empowerment** – ACAB seeks to assist clients to help themselves.
* **Information retrieval** – ACAB seeks to use the evidence collected through experience in dealing with enquiries to exercise a responsible influence on the development of social policies and services both locally and nationally.
* **A generalist service** – ACAB provides information, advice and assistance on any topic; no one calling at ACAB will be turned away because the Bureau does not deal with that type of problem.

## **Values**

**Staff and Volunteers**

ACAB believes that its staff and volunteers have unique gifts, strengths, and qualities.  ACAB creates an environment to enable these gifts to flourish by offering a wide range of enjoyable training, individual learning, personal development and working experiences.

**Clients**

ACAB understand the need for complete confidentiality when assisting clients and potential clients. Clients will be listened to and respected and given maximum assistance available to enable them to make the best decision for their circumstances. The assistance to clients will be delivered in a professional manner and with the interests of the client uppermost

**Funders and Supporters**

As a charity, the organisation exists through the goodwill of donations and funding. ACAB seeks to work with funders and supporters who hold the same principles, values and ethical perspectives as the Bureau.

**General Public**

Aberdeen Citizens Advice Bureau understands that people will, from time to time, need advice on a range of personal issues. The Bureau will never turn anyone away from the offices regardless of creed, gender or social circumstances. We will be fair and understanding to all visitors to the Bureau

# strategic focus

As part of the Scottish network of Citizens Advice Bureau and a member of Citizens Advice Scotland, the strategic focus of Aberdeen Citizens Advice Bureau reflects that of the its peer groups.

Four Strategic areas have been identified by the Board of Aberdeen Citizens Advice Bureau to be the focus if business over the next five years:

* Funding and Income
* Service Delivery
* Brand
* Advocacy and Influence

## **Funding and Income**

As a registered Charity, the existence of the Bureau is dependent on funding and income. The Bureau should not be wholly dependent on winning bids for funding to enable the delivery of service. Other income sources should be explored and secured. The strategic focus on Funding and Income will be underpinned by strategic objectives:

***STRATEGIC OBJECTIVES***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Strategic Objective** | **Actions** | **Responsibility** | **Measure** | **Timeframe** |
| **1. Apply for and secure external funding/grants** | Identify current and new sources of funding | Bureau Manager | Secure a minimum of 4 new funding sources per annum | Reported at the June 2019 meeting of the Finance Standing Committee |
|  | Continuously scan for funding opportunities | Bureau Manager | Report to the Finance Standing Committee | Reported at each meeting of the Finance Standing Committee |
|  | Compile statistics on number of bids submitted | Bureau Manager | Number of bids submitted | Reported at each meeting of the Finance Standing Committee |
|  | Secure funding | Bureau Manager | Increases in funding year on year  % of bids that are successful | Reported at AGM annually  Reported at AGM annually |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **2. Secure additional Income** | Identify current and new sources of income | Finance Standing Committee | Secure a minimum of 4 new funding sources per annum | Reported at Board Meeting on 30 July 2019 |
|  | Pursue and secure current and new sources of income | Finance Standing Committee | Current income streams secured  New income streams developed  Year on year growth of annual income | Reported at AGM annually  Reported at AGM annually  Reported at AGM annually |

## **Service Delivery**

High quality advice and information should be available for all who need it. ACAB should test the service delivery through audit and survey and react to the results. The Bureau should actively seek to work in partnership with other organisations, including other Bureaux and CAS, to ensure quality of service, consistency of delivery and application of best practice.

***STRATEGIC OBJECTIVES***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Strategic Objective** | **Actions** | **Responsibility** | **Measure** | **Timeframe** |
| **1. Maximise Resources** | Ensure adequate volunteer and staff levels available to the Bureau | People Matters Standing Committee | Report to volunteer and staff turnover submitted to People Matters Standing Committee and to the Board | Each Board meeting |
|  | Identify and provide training for volunteers and staff | Bureau Manager | Report on number of Volunteers trained and courses undertaken by staff and volunteers | Each People Matters Standing Committee meeting |
|  | Review current Bureau Policies to ensure that they are accurate, clear and workable. | People Matters Standing Committee | All current Bureau Policies are updated and review dates set for future review | August 2019 |
|  | Develop additional Bureau Policies ensuring clarity in all Bureau business | Bureau Manager | Where policy deficiencies are identified, new policy guidance is developed | On-going but reviewed at each People Matters Standing Committee meeting |
|  | Develop a succession plan | People Matters Standing Committee | Report to the Board submitted | Board meeting July 2019 |
|  | Devise and implement an HR matrix | People Matters Standing Committee and Bureau Manager | Report to the Board on sickness absence, retention and recruitment of staff submitted |  |
| **2. Provide Quality service to clients** | Review and react to audit results to improve service delivery | Bureau Manager | Action Plan to relevant Standing Committees |  |
|  | Carry out an annual client survey | Bureau Manager | Action Plan to relevant Standing Committees |  |
|  | Ensure that Bureau data capture is accurate | Bureau Manager | Action Plan to relevant Standing Committees |  |
| **3. Reduce Waiting times for Clients calling at the ACAB offices** | Develop a system for capturing clients waiting times | Bureau Manager | Quarterly report on waiting times to relevant SC |  |
| **4. Develop other/additional methods of client interaction** | Monitor current technological solutions to client interaction | Bureau Manager | Report to Communications Standing Committee with suggestions for innovation |  |
|  |  |  |  |  |

## **Brand**

Brand recognition is a valuable asset for any organisation. The promotion of ACAB by raising its profile locally and nationally will lead to a better understanding of what the organisation stands for and what it does. Raising the profile should result in an increase in volunteers, funding, and income. A co-ordinated and recognised communication plan is needed to ensure that messages are being delivered in a consistent way, through the most appropriate channels

***STRATEGIC OBJECTIVES***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Strategic Objective** | **Actions** | **Responsibility** | **Measure** | **Timeframe** |
| **1. Improve the profile of the ACAB** | Develop and implement a Communication Plan | Communications Standing Committee | Plan approved as suitable by the Board | July 2019 |
| **2. Raise awareness of the work of the Bureau** | Attend appropriate meetings and events where the work of the Bureau can be show cased | Bureau Manager and Members of the Communication SC | Activity Report to the Comunication SC quarterly | Report to the Board quarterly |
|  | Produce regular press releases and develop strong links with partners who can promote our work | Deputy Bureau Manager | Activity Report to the Comunication SC quarterly | Report to the Board quarterly |
|  | Produce information packages tailored for specific funders highlighting the value added of the support the Bureau provides | Bureau Manager plus relevant SCs | Activity Report to the Comunication SC quarterly |  |
|  | Arrange Annual Open Days | Bureau Manager | Report to Comms Standing Committee | Report to Board annually |
|  |  |  |  |  |

## **Advocacy and Influence**

It is the key remit of the Bureau to represent the interests of the Clients in any way possible. This is achieved in a number of ways including giving advice, re-directing clients to the most appropriate assistance and/or representing clients in disputes both informally and formally through the legal process. The Bureau, with it’s vast experience in dealing with the variety of subject matters presented to it, are in a position to supply evidence and offer advice to influence legislative bodies and government on matters of social policy.

***STRATEGIC OBJECTIVES***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Strategic Objective** | **Actions** | **Responsibility** | **Measure** | **Timeframe** |
| **1. Champion the interests and concerns of citizens and consumers of Aberdeen in relation to social policy changes.** | Raise awareness with key stakeholders | Bureau Manager  Comms SC | Activity Report to Board | Six monthly reports to Board and report to AGM |
|  | Collaborate with partners to strengthen position and address issues | Bureau Manager  Comms SC | Activity Report to Board | Six monthly reports to Board and report to AGM |
|  | Produce relevant papers and reports | Bureau Manager  Comms SC | Activity Report to Board | Six monthly reports to Board and report to AGM |
| **2. Respond to all consultation processes** | Gather intelligence, data and evidence relevant to current issues affecting clients. | Bureau Manager and  Comms SC | Activity Report to Board | Six monthly reports to Board |
|  | Complete the relevant format for input of the information. | Bureau Manager and  Comms SC | Activity Report to Board | Six monthly reports to Board |
| **3. Contribute to local Change processes** | Work with local partners to assist in achieving change and the Local Outcome Implementation Plan | Bureau Manager  Relevant Standing Committees | Activity Reports to SCs | Report to Board Half Yearly |
|  |  |  |  |  |