



CITIZENS ADVICE WOKING

BUSINESS AND DEVELOPMENT PLAN 2018 - 2021



EXECUTIVE SUMMARY

Actions to be taken by the Trustee Board, Chief Executive Officer and Operational Manager during 2018 – 2021

- **To undertake to open at least one new outreach centre per annum to enable clients to access advice more conveniently**
- **To ensure two groups of six new volunteers are trained in each financial year**
- **To recruit new volunteers by advertising in the local press and attending community events**
- **To increase the numbers of clients visited at home by a home visiting caseworker**
- **To migrate emails to Office 365 to ensure greater security and accessibility**
- **To seek opportunities for funding for specific projects**
- **To hold two fundraising events a year**



Citizens Advice Woking Business and Development Plan 2018 - 2021

Introductory Summary

CAW is an independent registered charity, a company limited by guarantee and a member of national Citizens Advice. CAW offers an advice service to the residents of Woking and those who work in the Borough. The Borough has a population of more than 105,000 and continues to grow. CAW has prepared a Business and Development Plan to cover a 3 year period from April 2018. The aim is to demonstrate how it will cope with an increased demand for its service by maintaining and expanding the current operation. CAW needs to offer a service which is accessible to anyone who needs help and assistance and this accessibility should be offered in as many different ways as possible.

Statement of Purpose

CAW is committed to the membership of the national organisation and as a member is committed to providing free, independent, confidential and impartial advice to the residents of Woking and those who work in the Borough, on their rights and responsibilities. The aim is to provide advice to those who need it on the problems they face as well as to improve the policies and practices that affect their lives. CAW values diversity, promote equality and challenge discrimination.

CAW is able to provide this independent advice service with the support of its main funder, Woking Borough Council (WBC). CAW is grateful for this support but it is understood by both parties that the policies and practices of CAW are determined by CAW's Trustee Board and not influenced by its main funder. CAW's service is impartial. It is open to everybody, irrespective of ability, age, gender, gender identity, race, religion or belief, sexual orientation and social or economic status. A client can expect to receive advice and help on any subject without any preconceived attitude on the part of any member of staff or volunteer.

CAW is in a unique position to exercise influence both locally and nationally. It collates evidence of poverty, ignorance, injustice or inefficiency of administration which may be acquired through its research and campaigns work. This evidence will continue to be used both locally and nationally to influence change.

Development Aims

We need to expand our service to make sure it is accessible to anyone who needs it. We wish to offer additional outreach sessions in those areas of the Borough where a higher percentage of the population is living in poverty as statistics show more than half of clients prefer face to face advice. There is also an aging population who find it difficult to access the service at all so we are aiming to expand our home visiting service, not only to those who through age are unable to travel, but who may be vulnerable in some way. For those who are comfortable accessing the service in other ways we want to increase the numbers of calls answered through Adviceline as well as through other methods using advances in technology.

CAW has a dedicated team of volunteers and paid staff who work together to provide an excellent service. We need to continue to recruit volunteers if we are going to expand the service and commit to a training programme which will maintain the numbers required. Our team copes with an extremely high caseload and support clients who may have several issues and be very vulnerable. We need to ensure their wellbeing and they are able to cope with the demand.

CAW will not be able to do any of this without funding. The core funding levels from Woking B.C must be sustained but we cannot expect this to cover all our operating costs and development aims. Ways of finding alternative funding partners must be a priority as well as finding third party organisations to work on joint projects.



Action Plan 2018-21

A. Advice Services

Objective 2018-19	Activities	Timescale	Responsible	Monitor	2019/2020	2020/2021
1. Establish a new outreach service at a different location within the Borough	1.1 Prepare a report on the most suitable location, incl. benefits of location, costs to CAW and accessibility for all.	April – June 2018	CEO		1 Evaluate the first 6 months of new outreach service 2 Prepare a report on the viability of opening a new outreach service	1 Analyse all outreach services and determine whether additional services are required
	1.2 Seek potential funding sources and prepare appropriate applications.	April – August 2018	CEO			
	1.3 Enter into hire agreement for premises.	August – September 2018	CEO			
	1.4 Recruit and train volunteers to be on the rota.	August – September 2018	Operational Manager			

	1.5 Publicise the new service	August – September 2018	Admin Officer			
	1.6 Open the service	September 2018	All			
	1.7 Monitor and report on the new service.	Trustee Board meetings	CEO			
2. To increase the number of calls answered by Adviceline	2.1 Prepare an analysis of the raw data of calls from Sept 2017 – Mar 2018 to identify possible trends and needs.	April – June 2018	CEO		1 Analyse the number of Adviceline calls from November 2018 to decide whether to continue with increased resources 2. Analyse whether additional resources should be used to increase access to clients through webchat and email	1 Determine whether additional resources are needed for Adviceline services
	2.2 Prepare training on the new Adviceline Platform	April – June 2018	Operational Manager/ Training Supervisor			
	2.3 Recruit additional volunteers to	April – June 2018	Operational Manager/ ASS			

	answer Adviceline calls.					
	2.4 Update the training programme for all new Trainees	July – October 2018	Operational Manager/ Training Supervisor			
	2.5 Introduce new weekly timetable for Adviceline with one supervisor and two general advisers on rota as identified at times of need.	November 2018	Operational Manager			
3. To recruit and train 12 volunteers per financial year in 2 separate groups to become advisors	3.1 Write a recruitment policy which sets out the application and interview process for volunteers.	April – June 2018	CEO/ Operational Manager		1 Analyse whether recruiting 12 volunteers is feasible and whether there are resources to increase the numbers 2 Continue to recruit and train 12 volunteers 2 times a year	1 Analyse whether recruiting 12 volunteers is feasible and whether there are resources to increase the numbers 2 Continue to recruit and train 12 volunteers 2 times a year
	3.2 Advertise for new volunteers	May – July 2018	CEO/ Admin Officer			
	3.3 Interview	June 2018	CEO/ Operational			

	volunteers	ongoing	Manager/ Trustees			
	3.4 Set timetable for the training of 2 groups to commence training	August 2018	Training Supervisor			
	3.5 Update the Training and Development Plan	April – June 2018	Training Supervisor			
4. To expand the home visiting service	4.1 Write a home visiting policy to explain which clients can be visited at home and what services are offered	July – September 2018	CEO		1 Report on benefits or otherwise of home visiting service to clients. 2 Decide if levels are sustainable and whether it can be expanded	1 Report on benefits or otherwise of home visiting service to clients. 2 Decide if levels are sustainable and whether it can be expanded
	4.2 Prepare a budget on the cost to CAW of providing an increased service.	July – September 2018	CEO			
	4.3 Seek potential funding sources and prepare appropriate applications.	July – September 2018	CEO			

	4.4 Recruit and train advisers to become home visiting advisers.	September 2018 onwards	Training and Operational Manager			
	4.5 Update lone worker policy	June – July 2018	CEO			
5 To maintain Guildford County Court Help Desk Project	5.1 To seek potential funding sources and complete appropriate applications.	Ongoing	CEO		Seek potential funding sources and prepare appropriate applications.	Seek potential funding sources and prepare appropriate applications.
6. Introduce Ask Routine Enquiry Programme	6.1 Attend Ask Routine Enquiry Programme Training	April 2018	CEO/Operational Manager/Training Supervisor		1 To make CAW BSL friendly 2 make links with local Deaf support groups	Explore possibility of becoming a hate crime centre
	6.2 Arrange training session in house for Advice Session Supervisors	August 2018	CEO/Operational Manager/Training Supervisor			

	6.3 Arrange training session for all paid staff and volunteers	September 2018	CEO/Operational Manager/Training Supervisor			
	6.4 Implement Ask Routine Enquiry Programme into advice delivery service	October 2018	CEO/Operational Manager/Training Supervisor			

B. Research and Campaigns

Year 1 2018 -19	Objective	Action	Timescale	Responsible	Year 2 2019 - 20	Year 3 2020 - 21
Running a Research & campaigns Team	1 To allocate a specific Budget to the R&C Team to promote R&Cs amongst staff, volunteers and the wider community	1.1 Produce a six month budget to be submitted to the Trustee Board for approval to cover training, travel expenses, incentives and publicity	October 2018	Operational Manager	Review the effectiveness of the Budget spent October 18 – March 19 and prepare further 12 month budget proposal for 2019 – 20 by 30 th April 2019	Review the effectiveness of the Budget spent 2019 – 20 and prepare further 12 month budget proposal for 2020 - 21 by 30 th April 2020
		1.2 Upon receiving Board approval allocate the budget to be spent for the following six months as agreed by the R & C Team	March 2019	Operational Manager		
Evidence & Research	2 Induction Training Programme for Trainees and on-going training for advisers	2.1 Re-write current training programme for trainees	June 2018	Operational Manager and Training Supervisor	Review training programme for trainees June 2019	Review training programme for trainees June 2020
		2.1 Devise early doors training programme to update all advisers on R &Cs locally and nationally and how to write a good EF	October 2018	Operational Manager & Training Supervisor	Review whether any early doors sessions need to be provided during the year April 2019	

	3 Ensure all Advisers and paid staff contribute at least one EF in a 12 month period	3.1 Remind all staff in CAW News, team briefings, staff meetings and appraisals.	December 2018	CEO, Operational Manager and ASS	Ensure all Advisers and paid staff contribute at least one EF in a 12 month period	Ensure all Advisers and paid staff contribute at least one EF in a 12 month period
Campaigns	4 Devise and run a local campaign	4.1 Identify a local “emerging issue” and devise a campaign	June 2018	CEO, Operational Manager and R & C Team	Analyse the effectiveness of the local campaign, report on the results April 2019 Devise and run a local campaign June 2019	Analyse the effectiveness of the local campaign, report on the results April 2019 Devise and run a local campaign June 2020
		4.2 Implement the campaign	September 2018	Operational Manager		
Involving clients and supporters	5 Ensure that more of our clients are aware of R & C work being done by CAW	5.1 Update website, Facebook and use twitter	Ongoing monthly	Operational Manager	Review effectiveness of social media on raising awareness of R&C work April 2019	
		5.2 Include at least one R & C update in CAW news	Ongoing weekly	Operational Manager		
		5.3 Update posters in waiting room and interview rooms	Ongoing	Operational Manager		
		5.4 Introduce a procedure for advisers to follow when there is	December 2018	Operational Manager		

		a call for evidence by CitA to ensure this is discussed with clients				
Influencing & Networking	6 Complete Stakeholder Analysis	6. 1Use CitA stakeholder tool to produce analysis	September 2018	CEO & Operational Manager	Update the stakeholders analysis April 2019	Update the stakeholders analysis April 2020
		6.2 Analyse the stakeholders to determine which relationships to pursue	December 2018	CEO & Operational Manager		
Communication	7 Improve use of social media	7.1 Update website, Facebook and use twitter	Ongoing monthly	Operational Manager		
		7.2 Include at least one R & C update in CAW news	Ongoing weekly	Operational Manager		
	8 Improve liaison with local newspapers/radio	8. 1Submit press releases regarding local and national campaigns	Ongoing	Operational Manager		

C Promoting Citizens Advice Working in the Community

Objective 2018-19	Activities	Timescale	Responsible	Monitor	2019/2020	2020/2021
1. To promote CAW in the community by attending one public event a quarter	1.1 Establish which public events are suitable for CAW to attend	April – May 2018	CEO		To promote CAW in the community by attending one public event a quarter	To promote CAW in the community by attending one public event a quarter
	1.2 Contact the organisers and arrange attendance	April – Ongoing	CEO			
	1.3 Plan what CAW will do at each event	April - ongoing	CEO			
	1.4 Recruit staff and volunteers to attend on behalf of CAW	April - ongoing	Operational Manager			
2. To build a relationship with the local press to report on CAW's work on local and national issues	2.1 Make contact with the Editors of the local newspapers	July – October 2018	CEO		To build a relationship with the local press to report on CAW's work on local and national issues	To build a relationship with the local press to report on CAW's work on local and national issues
	2.2 Submit press releases when there is a local or national campaign	Ongoing	CE/Operational Manager			

D Resources Strategy

i) Funding

Objective 2018-19	Activities	Timescale	Responsible	Monitor	2019/2020	2020/2021
1. To strengthen the partnership with CAW's main funder, Woking B.C, to enable delivery of the current service	1.1 Report quarterly on outcomes achieved by delivery of the service	June, September, December 2018 and March 2019	CEO		To strengthen the partnership with CAW's main funder, Woking B.C, to enable delivery of the current service	To strengthen the partnership with CAW's main funder, Woking B.C, to enable delivery of the current service
2. To secure funding for delivery of the Guildford County Court Help Desk	2.1 Complete and submit applications for funding to – a) Office of Police and Crime Commissioner b) Access to Justice Foundation	April 2018 October 2018	CEO		To secure funding for delivery of the Guildford County Court Help Desk	To secure funding for delivery of the Guildford County Court Help Desk
	2.2 Submit funding requests to Guildford and Woking B.C by providing up to date statistics on numbers of clients and outcome	April 2018	CEO			

	2.3 Explore options for further funding and submit applications as appropriate	Ongoing	CEO			
3. To hold 2 fundraising events a year	3.1 Decide which events to hold, date and location	April 2018	Trustee Board/CEO		To hold 2 fundraising events a year	To hold 2 fundraising events a year
	3.2 Trustees to form a Fundraising subcommittee to organise and oversee events	May 2018	Trustee Board/CEO			
4. To seek funding opportunities	Apply for new contracts where funding is available and where economically beneficial	Ongoing	Trustee Board/CEO		Apply for new contracts where funding is available and where economically beneficial	Apply for new contracts where funding is available and where economically beneficial

ii) People

Objective 2018-19	Activities	Timescale	Responsible	Monitor	2019/2020	2020/2021
1. To safeguard against work related stress caused by high workload and vulnerable clients	1.1 Undertake a risk assessment to identify the causes of work-related stress	April – June 2018	CEO		Determine what areas of support and training are required for staff and volunteers	Determine what areas of support and training are required for staff and volunteers
	1.2 Organise mental health training sessions for all paid staff and volunteers	July 2018	CEO			
	1.3 Arrange an off-site team building day for all paid members of staff to discuss ways to prevent stress and remain healthy.	December 2018	CEO			
2. To implement a plan for the training requirements of all paid staff and volunteers	2.1 Write a workforce development plan	January 2019	CEO/Operational Manager		1 Ensure workplace development plan is being followed 2 Put into action any areas of development required by staff	1 Ensure workplace development plan is being followed 2 Put into action any areas of development required by staff

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iii) Premises, Equipment, ICT

Objective 2018-19	Activities	Timescale	Responsible	Monitor	2019/2020	2020/2021
1.To migrate CAW's email to Office 365	1.1 Obtain a proposal from Entegraty for the provision of the service	June 2018	CEO		To migrate further data to the cloud	To decide whether the current IT system is fit for purpose and what changes may be required
	1.2 Report to the Trustee Board and seek approval for the cost of the project	June 2018	CEO			
	1.3 Agree timetable for migration	July 2018	CEO/Operational Manager			
3. Update Health and Safety Executive Policy	3.1 Rewrite HSE Policy where necessary	August 2018	CEO			

E. Contingency Measures

Objective 2018-19	Activities	Timescale	Responsible	Monitor	2019/2020	2020/2021
1. Data to be backed up off site	2.1 Explore options and obtain quotes	June 2018	CEO			
	2.2 Agree on service provider and enter into contract	July 2018	CEO			