



# **LEWES DISTRICT CITIZENS ADVICE**

## **BUSINESS & DEVELOPMENT PLAN**

**For the period 2019 – 2022**

**Charity Registration number 1068146**

**Company limited by guarantee**

**Company Number: 3485336**

**Registered Office: 15-19 Chapel Street, Newhaven, BN9 9PN**

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### **1. Introduction**

This Business and Development Plan (BDP) covers the period from 1 April 2019 to 2022 and aims to ensure that the services delivered by Lewes District Citizens Advice are based on a sound and sustainable business footing to ensure local people can access a professionally run advice service. It was provisionally approved by the Trustee Board on 27<sup>th</sup> February and will be brought back to the meeting on the 29<sup>th</sup> May when end of year figures for 18-19 have been inserted.

The key elements comprise Agenda items for each Board meeting, which monitor progress and address current issues. The BDP will be updated annually to address prevailing issues that affect the current service as detailed below.

### **2. Lewes District Citizens Advice (LDCA)**

2.1 LDCA is an independent entity. We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We help people resolve their legal, money and other problems by providing information and advice and by influencing policymakers. We use evidence of the clients' problems to campaign for improvements in laws and services that affect everyone. We value diversity, promote equality and challenge discrimination.

2.2 We are a registered charity and became a Company limited by Guarantee in December 1997. Lewes and Seaford CAB came into being in 2002 formed from the merger of Lewes Area CAB and Seaford CAB. The name change to Lewes District CAB was effected in 2013 and from 2016 we have been known as Lewes District Citizens Advice following the National Rebranding.

2.3 In February 2018 the Board adopted the current (2009) Citizens Advice model Articles as its governing document.

2.4 We are affiliated with/Member of Citizens Advice the national body which sets standards and helps local services such as ours deliver a consistent service throughout the Country. The standards are consistent with what is expected to lead, manage and deliver quality services. Our performance is compared with similar organisations and results fed back so that improvements can be made where required. This information is available at Board meetings.

2.5 Our service covers the whole of the Lewes District Local Authority area. Lewes District covers 29sq.km and half the district is included in the South Downs National Park. The district has a population in excess of 102,000 largely concentrated in the 5 urban areas of Seaford, Newhaven, Peacehaven, Telscombe and Lewes. The population continues to increase with new housing developments in a number of areas within the District. The district also has a large rural community dispersed among 23 parishes. (Appendix 6)

2.6 There is a higher than average number of above 65s (24% of the population), and higher than average owner occupation in the area. Regarding indices of multiple deprivation, 7 Lower Super Output areas in the District fall within the most deprived 30% nationally with the top three being Newhaven Valley, Lewes Castle and Peacehaven North. In addition to these areas of high need, we recognise that it has a rural area to service, where living costs are often much higher than in urban areas. Citizens Advice nationally accepts that the LDCA counts as a rural bureau.

2.7 The **Board** is responsible for overall control of LDCA and currently comprises

- 8 elected Trustees with a variety of expertise  
a representative member from
- Lewes District Council
- Lewes, Seaford, Newhaven, Peacehaven and Telscombe Town Councils
- the Legal Profession, and
- 1 co-opted former Trustee for a limited period with a specific remit.

The District Manager, the Office Manager and two staff representatives currently attend Board meetings although the position of the representatives is under review with a new policy to enhance staff/Board interaction about to be introduced.

2.8 There is a sub-committee of the Board (the **Cabinet**) with a membership of up to four Trustees. The terms of reference and the serving Trustees are agreed annually by the Board. They normally meet once a month with the District Manager and Office Manager. They undertake “hands-on” roles to assist the management team, for example on Finance, IT, buildings and planning. Importantly, they also conduct delegated business as necessary between Board meetings. They contribute up to three days a week adding value to the work of the management team.

### 3. Services

3.1 The LDCA provides advice in relation to debt management, welfare benefits, housing, consumer issues, etc. A major current issue is the implementation six months ago of Universal credit in our area.

The main services are:

- Assessor level advice which is available by telephone (Adviceline) and in person during opening hours together with an email service [www.eastsussexcab.co.uk](http://www.eastsussexcab.co.uk) and the on-line self-help website [www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)
- Follow up generalist level advice to those who live or work in the Lewes District
- paid specialist welfare benefits and debt advice for local residents, funded by LDC
- A new Help to Claim service will be introduced from 1<sup>st</sup> April 2019 to help clients making claims for Universal Credit. This service will be delivered via phone, webchat and face to face.

3.2 Our main office is in Newhaven, with other offices in Lewes and Seaford. We also offer advice at Outreach locations in Peacehaven and Telscombe.

3.3 We liaise with other CABs in East Sussex either individually or as part of Citizens Advice East Sussex, for the purpose of sharing resources to best effect and fundraising.

### 4. Finance

4.1 LDCA's main funder is Lewes District Council, with whom we have a Service Level Agreement. This sets out clearly the level of service to be provided in return for the grant received. We receive other funding from Lewes DC and the Town and Parish Councils, supplemented by grants generally for specific projects. Attracting alternative sources of funding to maintain services is challenging and time consuming whilst at the same time cuts in government funding increases demand for the service.

4.2 The Board agrees an annual **budget** (Appendix 1) which is set to generate a small surplus.

In 2018/19 total income was £246,396. compared to expenditure of £243,661. Income was less than budgeted due to the late cancellation of the CCG contract, but this resulted in reduced expenditure specifically salary costs. Some expenditure costs were higher than anticipated specifically printing and stationery and these will be subject to scrutiny in this financial year whereas on the positive side annual travel & parking costs at our new location in Newhaven were less than the amount set

aside in the budget. The overall outcome for the financial year 2018/19 is a small surplus of £2,735 compared to the budgeted figure of £416.

(The figures in the above paragraph have yet to be formally examined so could be amended in due course.)

4.3 Our policy is to maintain **reserves** at a level of 3 – 6 months operating costs so that it can meet its financial commitments:

- to keep sufficient funds to continue the provision of services at the start of the new financial year
- to cover any liabilities that arise in relation to staff
- to allocate limited funds to attract and match additional project income

At the end of the financial year 2018/19 our **reserves** stood at £98,838 in line with our policy noted above.

## 5. Staffing

5.1 LDCA has 13 part-time paid positions including the District Manager, an Office manager, two Advice Session Supervisor/Training Supervisors, one Advice Session Supervisor, four specialist caseworkers and three outreach advisers and one project worker. (Appendix 2)

The staff typically work, between seven and 28 hours per week. In addition, the work is supported by about 45 volunteer advisers. In total the contribution of our volunteers and Trustees has been estimated to be the equivalent of approximately 10 days per week. In total these volunteer contributions have been valued at over £280,000 pa.

5.2 Generally 4-6 volunteer advisers leave each year and are replaced to maintain a steady level of staffing. While successful, recruitment of both paid and volunteer staff is not always easy, and it is a time-consuming activity.

We are still actively recruiting volunteers following the reconfiguration of offices in early 2018. Some of the long-term volunteer staff from Lewes decided not to relocate which initially caused problems in meeting demand but this is gradually being resolved. It is our longer-term objective to increase the proportion of staff recruited from the coastal strip but appreciate that this may take time due to the different demographics within Lewes District.

5.3 **Appraisals** are carried out annually for all staff and volunteers and training and development needs addressed.

5.4 **Training**. New advisers can take up to a year to become trained by the time they have undertaken the relevant number of supervised advice sessions. This is managed by our training team comprised of two part time workers and one

volunteer. While successful this is also a time-consuming activity and the training process is reviewed nationally on a regular basis.

## **6. Other resources**

**6.1 Premises.** The new main office opened in Newhaven in April 2018 giving us a “nerve centre” where management and training staff can co-exist with specialist workers and advisors delivering the service. At the same time the Lewes office was relocated to Southover House. We are still accessing the financial implications of these changes to our annual service overheads. We also continue to operate from a multi-agency site in Seaford, as well as Peacehaven, where the funding has been under pressure, and Telscombe. As we are operating now over three main sites, as well as offering an outreach service at two other sites we revised the opening hours over the District. (Appendix 5). Although there was some initial negativity to this revision it is now operating well and meeting the needs of the community.

**6.2 Information Technology.** LDCA has a volunteer IT specialist (a member of Board and Cabinet) who was responsible to installing the new IT system across all offices and continues to be responsible for the security and updating. The Board acknowledges that the maintenance of the system across all offices and IT training for staff is a priority and requires continued investment.

## **7. LDCA Clients and their issues**

7.1 In recent years, our clients have been predominantly (60/40) white females, aged between 25 and 70, many of whom have disabilities or long-term health issues. (Appendix 3)

7.2 In the year ending March 2018 the service dealt with 9,295 client issues. Debt and benefit problems continue to be the major categories of work, with welfare benefits representing nearly 43% of all advice. The advice issue codes show a high number of categories relating to Personal Independence Payments, Employment Support Allowance and Housing Benefit; they also show a high number of debt problems relating to Council Tax arrears, credit, store and charge cards, water and fuel debts. The advice needs analysis has drawn on the statistics for Lewes District Council, our local Community Legal Service partnership (CLSP), and the client feedback questionnaire. All of these indicate that we are providing a service to clients who are among the most vulnerable in the district.

7.3 In 18-19 these clients received economic gains of £913,635 following on from the advice they received. In addition, £240,863 of debt was written off and £64,862 of debts repayments were rescheduled. Our local authority funders receive regular **‘dashboard’ reports**. These give a quarterly review of key statistics including number of clients seen, top advice categories and income gain across the district.

7.4 Demand for debt and benefit casework continues to outstrip the adviser hours that can be funded from income. The complexity of issues arising out of the

introduction of Universal Credit in the Lewes Area in September 2018 has increased the demand for our services. The Board and District Manager are working with the Local Authority and the Department of Work & Pensions to try to ensure that the most vulnerable clients do not have to wait too long for appropriate advice and support to deal with the changes in their finances.

7.5 The results of the 2018 annual **client satisfaction survey** showed that 82% of respondents said that they were happy or very happy with the service received, 91% would use the service again, and 86% would recommend the service to others.

## **8. Promoting the Service, Research and Campaigning**

8.1 Our aim is that issues of local and national importance are addressed for clients and brought to the attention of Citizens Advice.

8.2 The District Manager and a member of the Trustee Cabinet raise the profile of the service through the local press, radio and TV. They regularly meet the local MP and talk at meetings with local authorities, and agencies in the statutory, voluntary and private sectors to report on our activities and to promote the service. Key issues are also reviewed at the regular Cabinet meetings. The Trustee Board is supported by the work of the dedicated research and campaigning co-ordinator and a trustee lead for research and campaigns.

Our staff provide talks to local groups, have regular contact with other voluntary sector agencies in the area and participate in benefit awareness campaigns

There are cards detailing opening hours in GP's surgeries, supermarkets, nursery schools and community centres,

8.3 Lewes District Council publicise our services in their council tax leaflet sent to all households in the district, flyers are sent out by Lewes District Council with their arrears' notices for rent and or council tax.

8.4 We provide quarterly reports to Lewes District Council as per the monitoring arrangements agreed in the grant agreement. We also provide twice yearly reports to the town councils on client activity and financial gains and give regular presentations at town council meetings to demonstrate the value of advice in relation to their funding.

## **9. Equality**

9.1 LDCA fully supports the Stand up for equality policy. We seek to ensure that services are as accessible as possible to all sections of the community and promotes equality issues to tackle discrimination and disadvantage.

- **Hate crime** LDC is a hate crime reporting centre and all our volunteers have been trained in how to recognise hate crime and signpost to LDC as required
- **Gender violence** Our volunteers are aware of the need to give clients a safe environment in which to discuss their problems.

- We recognise the needs of hard of hearing clients who need **BSL interpreters, and** we can access local signers if required and have a fund of money specifically to pay the costs. We are also paying for an inhouse volunteer to train as a BSL interpreter.
- We have access to a fund of money for interpreter services to ensure that clients for whom English is a second language are not disadvantaged.

9.2 We have access to online training designed to help us advise clients within the **Gypsy and Traveller** community.

### 9.3. Long term health conditions including mental health.

- 48% of the clients we saw in 2018-19 had long term health issues or disabilities. This is recognised in our funding from LDC who give us a contribution towards our specialist debt and benefit caseworkers.
- Staff and volunteers with long term health conditions are encouraged to work flexibly and take time off for medical conditions as required.

## 10. Risk management

The Trustee Board monitors, and acts upon the impact, of the financial and other **risks** to service delivery, particularly with reference to the cessation of short-term grants, the increased overheads noted above, and changes to national policies e.g. Universal Credit. (Appendix 4)

### Three-year objectives 2019-2022

The Board have agreed 12 main objectives bearing in mind LDCA operates with a part-time staff, is categorised as rural, and operates over 3 permanent and 2 outreach offices. These, along with outcomes, responsibilities and times scales are listed below.

Objective	Outcome & Responsibility	Time Scale	Outcome: Annual Update/ achieved
<b>Service Delivery</b>			
<b>1. Overall Service:</b> To ensure that as far as possible the service is able to adequately respond to the demand over all the locations thereby meeting the needs of diverse groups within the community.	<b>Outcome:</b> To ensure availability in whatever way people may wish to access the service and to achieve the highest quality of advice as possible.  <b>Responsibility:</b> Trustee Board/District Manager	Quarterly reviews of statistical evidence of how people are accessing the service are available to Trustees and for presentation to Funders	.
<b>2. Universal support Help to claim:</b> To set up and deliver end to end	<b>Outcome:</b> To have phone, webchat and face to face advice	To recruit a member of staff to deliver the service. To set up the	

support to help people make a new Universal Credit claim	available across the District. To have met the target client numbers as set by Citizens Advice.  <b>Responsibility:</b> District Manager/Supervisors	telephone and webchat platform. To ensure that all staff are trained to support face to face clients with Universal Credit. To work with stakeholders and clients to find outreach venues from which to deliver face to face the Help to Claim support.	
<b>Funders</b>			
3. To ensure that the requirements of the grant agreement with Lewes District Council are met and that obligations to other funders are also met.	<b>Outcome:</b> To maintain an effective working relationship with LDC and other funders for the benefit of the local community.  <b>Responsibility:</b> Chair/District Manager	To regularly meet with appointed representatives and to send reports to LDC generally. To make annual personal representations to the Town Councils. To adhere to the reporting requirements of other Funders.	
<b>Trustee Board</b>			
4. To review & regularly update existing documentation relating to Trustees to demonstrate that we have in place the qualities required for the effective Governance of LDCA and that as far as possible the Board represents the local community	<b>Outcome:</b> To ensure the Board functions according to the requirements of Governance under the Performance & Quality framework with a range of skills and experience  <b>Responsibility:</b> Chair/Trustee with responsibility for Governance	Annually review of existing documentation and recruit to fill omissions according to the timetable for A.G.M.s held in November  Annual review of all policies & demonstrate the annual appraisal of the Board	
5. To continue to review succession plans for key Trustees/posts, especially the Chair.	<b>Outcome:</b> To ensure the continual effective control and performance of the Board.  <b>Responsibility:</b> Chair/Trustee with responsibility for Governance/Vice-Chair	Up to March 2021: Vice-Chair to undertake Leadership training.  Recruitment/Induction plans for key Board Posts	

6.To implement decisions made in 2018 in respect of Staff/Trustee communications and to monitor its effect on Staff/Trustee relations.	<p><b>Outcome:</b> A Trustee to attend staff meetings according to a schedule with the aim of creating a better understanding of the Trustee/staff role. Trustee induction to include visits to all the offices to meet staff.</p> <p><b>Responsibility:</b> Chair/Cabinet/District Manager</p>	To be reviewed in 2020 to assess the effectiveness of the new way of interaction with feedback from staff.	
<b>Finance</b>			
7.To maintain robust procedures to avoid risks to the service should there be a cessation in expected income	<p><b>Outcome:</b> To ensure the service can continue without any unforeseen financial problems.</p> <p><b>Responsibility:</b> Treasurer/ Chair</p>	<p>To work to a realistic annual budget.</p> <p>To review the financial position at each monthly Cabinet meeting &amp; at Board meetings</p>	
8. To fundraise as appropriate for specific projects e.g. as applied to specific client groups, staff hours or equipment.	<p><b>Outcome:</b> To increase capacity by fundraising according to an agreed strategy using a full cost recovery model</p> <p><b>Responsibility:</b> Chair/Treasurer/ Fundraiser/District Manager</p>	To be aware the possible effects of short term funding.	
<b>Staff</b>			
9. To ensure there is recognition of the value of the management team	<p><b>Outcome:</b> To avoid risk to service in the event of staff leaving.</p> <p><b>Responsibility:</b> Chair/District Manager</p>	<p>Up to March 2020: To maintain an effective succession plan in place for senior staff</p> <p>Keep plan reviewed &amp; updated</p>	
10.To achieve and maintain an adequate number of volunteer advisors through a rolling programme of recruitment and training	<p><b>Outcome:</b> LDCA staffed at optimum level allowing maximum time to deal with complex inquiries</p> <p><b>Responsibility:</b> District Manager/Trainer</p>	To continue to recruit a diverse pool of advisers especially from along the coastal strip	
<b>IT</b>			
11. To continue to have a secure and a well	<p><b>Outcome:</b> To ensure LDCA system is secure,</p>	To maintain a rolling programme to	

maintained IT network throughout LDCA	robust and updated regularly to allow service to function efficiently.  <b>Responsibility:</b> District Manager/ Lead Trustee	update/replace hardware/software as required and to train staff & Trustees accordingly	
<b>Research &amp; Campaigns</b>			
12.To highlight issues adversely affecting People in the Lewes District Council area.	<b>Outcome:</b> To provide evidence relating to specific issues to CitA in accordance with the objectives of the service  <b>Responsibility:</b> District Manager/Co-ordinator/ Lead Trustee	To fulfil the agreed strategy liaising with local and national government representatives  Continue to collect appropriate data from clients showing how national issues impact locally.	
<b>Partnership Working</b>			
13.To develop robust and effective partnership with appropriate agencies in the statutory, voluntary and private sectors	<b>Outcome:</b> To explore fully opportunities that could benefit and secure better outcomes for the communities we serve.  <b>Responsibility:</b> District Manager/Chair	Regular meetings with CABs in East Sussex & collaborative working with local voluntary partners  Develop links with the private sector wherever possible	

**Appendix 1 2018/19 Budget and Funders**

**Appendix 2 Staffing Profile**

**Appendix 3 Client statistics 2018/19**

**Appendix 4 Risk Register**

**Appendix 5 Opening hours**

**Appendix 6 Lewes District Local Authority Area**