



LEWES DISTRICT CITIZENS ADVICE BUREAU

BUSINESS & DEVELOPMENT PLAN

For the period 2017 – 2020

Draft March 2017

Charity Registration number 1068146

Company limited by guarantee

Company Number: 3485336

Registered Office: 3, North Court, Lewes, East Sussex, BN7 2AR

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1. INTRODUCTION

The plan

This Plan covers the period from 1 April 2016 to 31 March 2019. This update was agreed by the Board xxx

Lewes district

Lewes District Citizens Advice Bureau provides a service which 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 of 97,000 (Census 2011) largely concentrated in the 5 urban areas of Seaford, Newhaven, Peacehaven, Telscombe and Lewes. The district also has a large rural community dispersed among 23 parishes. There is a higher than average number of above 65s (24% of the population), and higher than average owner occupation

With regard to indices of multiple deprivation, 7 Lower Super Output areas in the District fall within the most deprived 30% nationally and of these the top three fall within Newhaven Valley, Lewes Castle and Peacehaven North. In addition to these areas of high need, the bureau recognises that it has a rural area to service, where living costs are often much higher than in urban areas. Citizens Advice nationally accepts that Lewes and Seaford bureau counts as a rural bureau.

Current issues

The bureau dealt with more than 10,500 issues for the year to end March 2016. Debt and benefit problems continue to be the major categories of work, with welfare benefits representing nearly 37% of all advice. The bureaux' advice issue codes show a high number of categories relating to Employment Support Allowance and Personal Independence Payment; they also show a high number of debt problems relating to credit, store and charge cards 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 bureaux' client feedback questionnaire our client satisfaction survey. All of these indicate that the bureaux are providing a service to clients who are among the most vulnerable in the district.

Demand for debt and benefit casework continues to outstrip the adviser hours we can supply and the figures for these areas are very strong. With the planned roll out of universal credit and the local changes to council tax the demand is likely to grow and this may result in clients having to wait for these services. Working with Peacehaven Town Council has enabled us to continue to offer one day of generalist advice in their offices however their current funding only covers 50% of our costs and this needs to be reviewed during the next financial year.

While we have been successful in attracting funding in recent years, this remains an ongoing challenge, especially in the light of the continuing cuts in local authority funding which increases demands on our services. A specific, current challenge is that of moving into, and attracting clients to our planned new Newhaven premises, and to Southover House, Lewes. We continue to work in partnership with other agencies and to explore funding opportunities to enable us to maintain our staff and volunteer numbers in order to meet the growing demand for our services.

2. Lewes District Citizens Advice Bureau

Lewes District Citizens Advice Bureau (the *Bureau*) is a registered charity and became a Company limited by Guarantee in December 1997. It changed its name to Lewes and Seaford CAB when it was formed from the merger of Lewes Area CAB and Seaford CAB in July 2002. The current name change to Lewes District CAB was effected in November 2013. It is expected to change again to Lewes District Citizens Advice later in 2016 following guidelines from the national rebranding exercise.

Overall control of the *bureau* is by the trustee **Board** comprising 8 elected committee members and for 8 representative¹ members. The chair of the Trustee Board is Mr Michael Bell. The Board normally meets quarterly. In addition the following also attend board meetings: 2 of the bureau management team (the District Manager is Company Secretary);

¹ Lewes District Council
Lewes Town Council
Seaford Town Council
Newhaven Town Council
Peacehaven Town Council
Telscombe Town Council
Legal Profession, Lewes district
Seaford Chamber of Commerce (no appointee as at November 2015)

2 representatives of the staff, 1 from Lewes and 1 from Seaford, and the Hon. Treasurer, if the Treasurer is not already a member of the Board.

There is an executive **Cabinet** made up of four trustees who 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, human resources, buildings and planning (this approximates to at least one day per week each). We will continue to develop the role of the Cabinet to add value to the work of the management team and conduct delegated business as necessary between main board meetings.

The *Bureau* has one full time and 11 part-time, paid members of **staff** and approximately 40 **volunteer** staff plus the contribution of the Trustees, four of whom provide additional time operating as the executive ‘Cabinet’. It is managed by the District Manager, supported by a management team made up of the Office Manager, Advice Session Supervisors and Training Supervisors.

It currently operates from 2 main **offices** in Lewes and Seaford, with Newhaven to be added later in 2017, and has **outreach** services in Peacehaven, and Telscombe Cliffs.

3. Aims and Services

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

The *Bureau* has a service level agreement with Lewes District Council, its main funder, which sets out clearly the level of service to be provided in return for the grant we receive.

The *Bureau* is actively involved in the East Sussex CAB consortium which brings together the CABx in East Sussex under the title of Citizens Advice East Sussex, for the purpose of sharing resources to best effect and fundraising. The consortium has established itself as a registered charity and a company limited by guarantee so that any successful fundraising can be paid to the consortium as an entity.

The main services are:

- 1.1 Advice is available by telephone (Adviceline) and in person during opening hours to those who live or work in the Lewes District together with an email service www.eastsussexcab.co.uk and the on-line self-help website www.citizensadvice.org.uk

1.2 The *Bureau* has a paid money adviser post predominantly funded by Lewes District Council, Lewes High Weald Havens Clinical Commissioning Group and Newhaven Town Council. The bureau does not take on debt casework or any other casework for clients who live or work outside of Lewes District.

1.3 The *Bureau* also provides a welfare benefits advice service by paid caseworkers at Newhaven predominantly funded by Lewes District Council and Newhaven Town Council.

The results of the 2016 annual **client satisfaction survey** showed that 87% of respondents said that they were happy or very happy with the service received, 93% would use the service again, and 91% would recommend the service to others.

Our clients are predominantly (60/40) white females, aged between 35 and 70, many of whom have disabilities or long term health issues. The main issues they raise are concerning benefits, debt and housing. In 2015/16 these clients received economic gains in excess of £ 1.5 million following on from the advice they received. These gains take the form of benefit entitlements, consumer redress and/or debts rescheduled or written off. Appendix 2 The local authority funders receive regular '**dashboard reports**' which give a quarterly review of key statistics including number of clients seen, top advice categories and income gain across the district.

Promoting the Service, Research and Campaigning

The District Manager and a member of the Trustee Cabinet work to raise the profile of the service through the local press, radio and TV.

The District Manager and a member of the Trustee Cabinet also 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.

Lewes District Council publicise the *Bureau's* services in their council tax leaflet sent to all households in the district. In addition:

- Flyers are sent out by Lewes District Council with their arrears notices for rent and or council tax.
- The *bureau* provides quarterly reports to Lewes District Council as per the monitoring arrangements agreed in the SLA.
- The *bureau* provides 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 the funding they give.
- *Bureau* staff provide talks to local groups on the work of the bureau and local meeting groups in rural communities

- There are cards detailing opening hours in GP's surgeries, supermarkets, nursery schools and community centres and Children's Centres
- There is contact with other voluntary sector agencies in the area.
- The *Bureau* participates in benefit awareness campaigns

The Trustee Board, working through the dedicated research and campaigning co-ordinators, also continues to raise the profile of this work by:

- Encouraging client participation in local and national campaigns
- Regular reminders to advisers to be alert to issues
- Working in partnership with the local MP, local councillors, local voluntary and statutory agencies.
- Providing a progress report at each board meeting.

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

4 Operational Management

Staff. The *Bureau* has 12 paid workers including the District Manager, an Office manager, three Advice Session Supervisors, a Training Supervisor, Guidance Tutor, 4 specialist caseworkers and 3 outreach advisers. They typically work part time between seven and 28 hours per week, one works full time. In addition the work is supported 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.

Recruitment. Typically 4-6 volunteer advisors 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.

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

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 two part-time trainers. While successful this is also a time consuming activity and the process has been updated in 2016. We are also looking at new ways to use training as a revenue stream.

Premises – The current main offices are in Lewes and Seaford, a multi-agency site. Later in 2017 we will be opening a new office in Newhaven while transferring the Lewes office to Southover House albeit on reduced hours. The move to Newhaven

will allow us to consolidate our existing service in Newhaven (Hub and Library) and also give us a “nerve centre” where management and training staff can co-exist with service delivery. There will however be challenges to overcome, not least the relocation and retention of essential volunteer staff from Lewes necessitating additional on-costs for travel and parking; although it is our longer term objective to increase the proportion of staff recruited from the coastal strip we are mindful that Lewes is likely to continue to be a major source of volunteers. Other challenges are likely to include a reduction in client numbers in the short term and an increase in service overheads without a corresponding increase in core funding.

Information Technology – We invest regularly to ensure staff and volunteers have appropriate equipment. We have a volunteer IT specialist (who is a member of Board and Cabinet) who is systematically updating and harmonising the systems across both offices, and we are reviewing future IT needs and expenditure.

5 Finance and risk management

The Board agrees an annual **budget** which is set to generate a small surplus. Income over the last two financial years has kept above the level of expenditure due mainly due to the delivery of debt projects for clients living in fuel poverty. The continuation of these funding streams beyond 2016/17 is uncertain. In 15/16 the bureau had an **income** of £240,000. The major funder is the Lewes District council. Other funders include all the Town Councils in the area with further ‘one off grants’. Appendix 1.

It is the policy of the *Bureau* 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

Funds have been put aside in designated funds for the costs of future changes to premises.

The *Bureau's* reserves at the end of March 2015 stood at £61,000 meeting its objectives.

Future funding from the local councils is agreed on an annual basis, with the District Council contribution covering a three year period, applications are also made for grants for specific projects.

Risk management

The Trustee Board continually monitors the risks for the service with particular reference to the on-going review of our premises and service delivery. Its activities are also reviewed in the Annual Liaison Visit Risk Review by our Network Development Manager from Citizens Advice. The 2015 Review concluded that the *Bureau* is well run and funded, but that a specific challenge relates to working with one of the local partners, this is currently being addressed.

Key new risks for 2017/18 and potentially subsequent years, relate to the move to Newhaven, and to Southover House, which will impact on costs and in the short term is expected to reduce the number of clients. In the case of Newhaven there will also be added travel and parking costs if recruiting local volunteers proves to be as challenging as we anticipate.

Risk register attached – appendix 3

6 Objectives to 2018

There are 10 main objectives. These, along with target dates, responsibilities and measures for success are listed below

Objective	Target Date	Lead	Measure for Success
1 To ensure service provision meets all the community's requirements, with emphasis on access to services in outreach and rural locations.	Review annually	District Manager / Chair	Improve access to advice across the district, especially in areas of deprivation.
2 To increase capacity through a rolling programme of training for new advisers, especially targeting the coastal strip.	Review annually	District Manager /training team	All bureaux staffed at optimum level.
3 Open a bureau in Newhaven	September 2017	Cabinet/District Manager/operations manager	Bureau presence in Newhaven
4 Implement the new Citizens Advice membership package including the local performance and quality framework (PQF)	From April 2017	Cabinet/District Manager/ Management team	Demonstrable by adherence to agreed exemptions and by continual assessment.
5 To update the IT system	Ongoing rolling replacement programme	District manager/lead Trustee/operations manager	Updated IT
6. To develop and implement a campaign to	December 2017	Research and campaigns co-	Qualitative and quantitative data as collected in bureau

tackle issues related to self-employment		ordinator/District Manager	
7 To explore web chat as a means of delivering advice	September 2018	District Manager / management team	Clear decision
8 To develop robust and effective partnership with appropriate agencies in the statutory, voluntary inc. the and private sectors to secure additional funding and better outcomes for the communities that we serve eg High Weald CCG and improved social prescribing	Ongoing	District Manager & Citizens Advice East Sussex	New partnerships
9 To ensure effective succession plan in place for key trustee, especially the Chair role, and bureau management staff.	AGM 2017	District manager and trustee board	Smooth transition of key roles.
10 Meet the requirements of the SLA with LDC and renegotiate for a further 3 years.	April 2018	Cabinet & District Manager	3 year SLA renewed.

Appendix 1 – 2016/17 Budget & list of funders

Appendix 2 – Client statistics 2016/17

Appendix 3 Risk register