

The 2008–2011  
Citizens Advice service strategy: an overview



Whoever you are, whatever the  
problem – achieving the Citizens  
Advice service vision



## Our vision

Our vision for the Citizens Advice service is to be recognised above all as an agent of social change; helping people take more control of their lives through accessible, responsive advice and enriching society through powerful influence on social policy.

## Our principles

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

## Our aims

- Provide the advice people need for the problems they face.
- Improve the policies and practices that affect people's lives.

## Our strategic goals

To achieve our vision for the Citizens Advice service, we have identified five over-arching, strategic goals. These are:

- easier and faster access to quality advice and information for more people
- to strengthen our voice in social policy
- to develop the Citizens Advice Bureaux network
- to develop new initiatives in advice
- a commitment to equality.

## Citizens Advice values

In carrying out its role, Citizens Advice staff ensure that they build into all their work and future plans a set of core values. The Citizens Advice values are to:

- focus on customers
- achieve results
- continuously improve
- promote equality and fairness
- value each other
- work together.

# Introduction

The Citizens Advice service has a central role in tackling injustice, reducing poverty and social exclusion, and enabling people to realise their full potential. Our advice services provide the impetus for millions to understand and realise their rights. By pressing for change in social policy, we help many more.

Our work is a powerful catalyst that helps social and economic regeneration across communities, and the services provided impact positively in many ways. Being at the heart of the community, such benefits include improved health and increased confidence and knowledge for individuals. The service also saves time and money for society and stakeholders through such actions as preventing homelessness, avoiding legal action and helping people to fill in official forms.

Our 2008–2011 service strategy – as set out here in summary – strengthens and increases our impact as a key agent of social improvement. It will enable us to improve our capacity to deliver free, confidential, impartial and quality advice available when people need it, and to use client evidence to strengthen our policy influencing role. It demonstrates how we will deliver on both these commitments by exploring new ways to operate, develop and fund our service.

At a time when the transformational government agenda is looking to reduce duplication and drive through efficiencies in a number of online and service areas, this leaflet also identifies some of the key Citizens Advice service strategy outcomes. One of the most important of these is that the Citizens Advice service will aim to double the number of

clients it helps each year to four million.

We face some tough challenges but there are many opportunities to help more people, particularly those in greatest need, more effectively across the whole Citizens Advice service.

*David Harker*



**David Harker,**  
Chief Executive

*Hilary Watkins*



**Hilary Watkins,**  
Chair



# The need for advice and the Citizens Advice service

Research conducted on behalf of Citizens Advice suggests that in one year 7.25 million people who would have liked to receive advice on a problem, had no help at all. Of those who did seek advice, 24 per cent approached a Citizens Advice Bureau, more than any other organisation.

In 2006/07, bureaux dealt with 2 million new clients, presenting more than 5.7 million issues. Benefits and debt problems are the main reasons people seek advice from a Citizens Advice Bureau, but hundreds of thousands of clients also present problems on a wide range of other issues including housing, employment legal and discrimination.

## **The structure of the service**

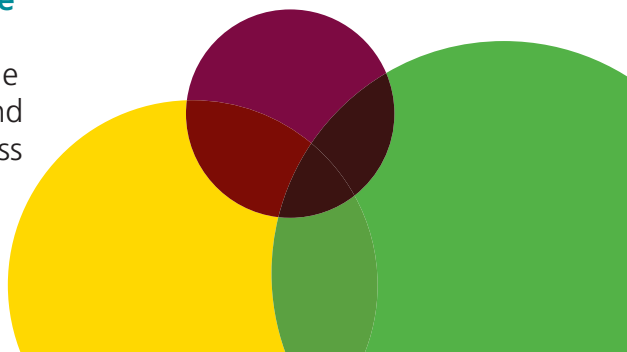
The Citizens Advice service comprises Citizens Advice (the membership organisation) and Citizens Advice Bureaux across

England, Wales and Northern Ireland. Both Citizens Advice and the member bureaux are individual charities and legal entities in their own right.

Each member bureau delivers its services from one or more physical location. In England and Wales, there are 670 main bureaux premises, 1,800 regular outreaches and 800 one-off or irregular outreaches: a total of 3,300 locations.

## **Bureau resources**

Volunteers are the backbone of the Citizens Advice service. Bureaux have a combined workforce of 27,200 people: 16,700 volunteers, 6,200 paid staff and 4,300 trustees. Advice is delivered by 15,000 advisers of which 12,500 are volunteers.



In 2006/07, total bureaux income stood at £140 million, of which £65 million was from local government sources.

Core bureaux services are typically supported by local authority funding. However, the growth in bureaux funding from local authorities has slowed in recent years as a result of increasing pressure on local government budgets. Many bureaux have been required to enter into a service level agreement or contract in order to maintain their core funding.

Despite the slowdown in the growth of local authority funding, total bureaux funding has continued to grow significantly. This is mostly as a result of opportunities for project-based funding such as the Financial Inclusion Fund.

### **Policy**

At least as many people are now being helped by changes that result from our policy work as are helped face-to-face in bureaux. It is a cost-effective, and often high profile, way of

resolving people's problems and one that is explicitly included in our aims and principles.

Policy makers look to the Citizens Advice service for authoritative, evidence based and constructive contributions to the development of policy, services and legislation. Citizens Advice stakeholders rate us highly for our influence on policy.

The creation of a statutory scheme to safeguard the deposits of tenants in the private rental sector is just one example of the benefits of our campaign work. At least 1.5 million tenants a year have better consumer protection as a result of our campaign in partnership with Shelter.

Our campaign on the growth of fee charging cash machines resulted in 2.4 million people having more free cash machines in their local area.

All bureaux now have social policy co-ordinators and submit evidence for use in policy work – largely via our client case

recording system. This enables rapid retrieval at local and national level. More bureaux than ever before are active at local level in supporting national campaigns and in running local ones.

There remains scope for development, with social policy work not yet seen as being as critical to the success of the service across some bureaux as it is nationally.

### **Potential and expectations**

The government has a number of key objectives that include:

- tackling social exclusion
- building community cohesion
- promoting saving, financial capability and inclusion
- tackling child and pensioner poverty
- transforming public services
- creating confident consumers
- delivering on the equalities agenda.

Local and national government and other stakeholders have expectations that the Citizens Advice service will help them deliver on their key policy aims.

Local government expects that the Citizens Advice service will both play a part in its modernisation programme and help it deliver on its local and sub-regional priorities.

Funders and other stakeholders are increasingly looking for evidence of outcomes and impact. They also expect a continued drive towards greater cost-effectiveness and efficiency.

In all of these areas there is a potential for the Citizens Advice service to work in partnership to bring about common goals. The service brings with it a well known and trusted brand, the skills and commitment of 27,000 staff and volunteers, strong existing relationships and partnerships, and a strong track record of delivery over nearly 70 years.



# Citizens Advice service strategic goals

To achieve our vision for the Citizens Advice service, we have identified a number of key strategic goals. The following five sections identify these key aims and sets out in brief how the Citizens Advice service will demonstrate its impact over the coming years in developing a more focused and responsive service for clients, partners and funders.

## **1. We will provide more people with easier and faster access to quality advice and information by:**

- working with bureaux to introduce a model throughout the service which provides self-help resources or referral following a short diagnostic interview
- focusing more resources on improving telephone access by setting up a virtual call centre and working with bureaux to create a service

that can be accessed with a single telephone number in England and Wales

- providing better services by developing the content and widening the use of the Adviceguide and AdviserNet websites, offering bureaux a common website format, engaging with e-government initiatives and exploring and developing new channels
- developing partnerships at the national level and supporting bureaux in identifying partners locally and developing a common method of auditing advice services
- continuing to provide bureaux with training, support services and quality of advice auditing, so as to improve the quality of advice delivered in bureaux

- freeing up bureaux resources to deliver advice by ensuring that high performing bureaux receive a lighter touch organisational audit.

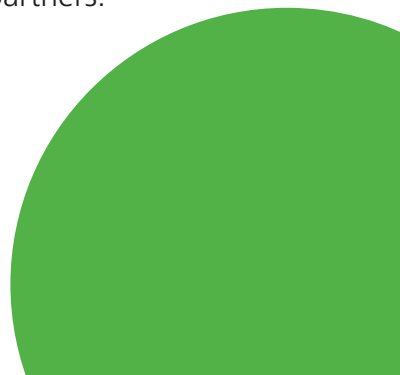
**The measures for this include:**

- overall number of clients dealt with doubled to 4 million
- 2.2 million clients accessing advice by telephone
- an increase in adviceguide visits from 7 million to 12 million per year
- 90 per cent of all telephone calls answered
- Over 80 per cent of clients satisfied by achieving a positive outcome.

**2. We will strengthen our voice in social policy by:**

- giving positive priority to identifying, describing and gathering evidence around the experiences of those people in our society in greatest need
- working with bureaux to increase engagement and involvement in policy work through campaigns

- increasing user involvement in our campaigns and policy work and rolling out tools and methods that will enable bureaux to involve users more in the policy work they do locally
- establishing systems to capture evidence from users of new services such as delivering preventative information and advice
- promoting the potential of CAB evidence to regulators and policy makers in government and establishing ways to allow them to regularly access our evidence in a manner that meets their needs
- promoting policy campaigns in partnership with others where this is the most effective way of working on any particular issue both for us and partners.



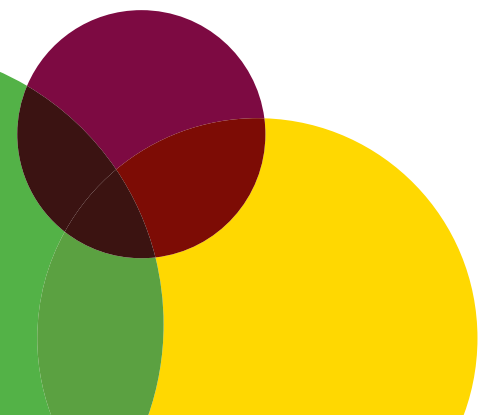
**The measures for this include:**

- the number of citizens who benefit from our policy work increasing to over 4 million
- 75 per cent of bureaux participating in Citizens Advice led campaigns
- more client evidence leading to more effective policy work
- an increase in the number of government departments, public bodies and regulators who regularly review CAB evidence
- an increase in external opinion of our campaigning effectiveness.

**3. We will develop the Citizens Advice Bureau network by:**

- encouraging bureaux to work together through use of effective partnership models

- ensuring our workforce is as diverse as the communities it supports and reviewing our volunteer training to provide more flexible options and support
- reviewing and improving the way Citizens Advice and its members communicate
- strengthening bureaux governance and management through provision of best practice research, developing standardised systems, intervening earlier and directly managing bureaux where necessary
- protecting core funding, while exploring new opportunities and providing the appropriate tools and guidance to support bureaux in this strategy
- maintaining but also evolving the structure of the service whilst encouraging the development of partnerships and collaborations.



### **The measures for this include:**

- maintaining stability of the bureaux network with 98 per cent geographic coverage and 27,000 staff and volunteers
- increasing diversity of staff and volunteer workforce at all levels of the service
- increasing core funding from £58 million to £64 million and diversifying funding sources
- more effective partnerships at local and national level.

### **4. We will develop new initiatives in advice by:**

- extending our services into generic financial advice and positioning ourselves as a key partner in its delivery
- developing our preventative work in partnership with government, the financial services industry and elsewhere – with a particular focus on ensuring that our national financial capability work continues to expand and that all bureaux are involved

- becoming recognised as a first point of contact on discrimination issues by partners and the public.

### **The measures for this include:**

- Citizens Advice seen as key strategic partner for government projects
- all bureaux involved in financial capability activity
- an increased number of financially capable individuals
- increasing access to information and advice on discrimination and human rights
- increasing stakeholder awareness of the Citizens Advice service as a point of contact on human rights and discrimination issues.

### **5. We will integrate our equality and diversity measures across all our strategic goals**

As our principles state, we value diversity, promote equality and challenge discrimination. We will

act on this commitment in the following ways:

- Stepping up action to ensure that each bureau provides and promotes an advice service that responds to the needs of its community.
- Agreeing and sharing a common understanding of 'greatest need' that allows us to focus our resources on those individuals and communities that need it most.
- Increasing our efforts to ensure that bureaux staff and volunteers reflect their communities.
- Improving our ability to identify and respond to discrimination cases.
- Taking an active role in policy change on equality and diversity issues.

**The measures for this include:**

- increasing to 9 per cent the number of bureaux managers and trustees from under-represented communities

- increasing the number of discrimination cases advised on from 40,000 to 100,000
- increasing to 95 per cent the number of discrimination cases identified by bureaux.



## About the Citizens Advice service

Citizens Advice is an independent charity and membership organisation. It is the UK's largest advice-giving service with nearly half of the population using the free service at some point in their lives.

There are 455 Citizens Advice Bureaux across England, Wales and Northern Ireland, all of which are also independent registered charities and members of Citizens Advice. Together we are the Citizens Advice service.

The Citizens Advice service delivers information and advice through face-to-face, telephone and email service, and online via adviceguide.

We use clients' experiences as evidence to inform policy makers and service providers about the impact of their policies both locally and nationally.

Citizens Advice provides support to member bureaux to ensure their continued presence in local communities through access to the necessary training and information.

As the national organisation, Citizens Advice also coordinates social policy work, campaigning, publicity and parliamentary work.

Citizens Advice Bureaux provide high quality advice and information in a range of community settings from the high street to libraries and GP surgeries.

Bureaux rely on volunteers to keep their services running and receive funding from various sources.





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Citizens Advice is an operating name of The  
National Association of Citizens Advice Bureaux

[www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)  
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