

## FALKIRK CITIZENS ADVICE BUREAUX JOINT STRATEGIC PLAN 2014-17

### 1. INTRODUCTION

This strategy sets out the collective aims and priorities of the three Citizens Advice Bureaux in the Falkirk Council area to work collaboratively and in so doing make best use of resources and optimise the services available to clients. First written in 2012, this refreshed and updated strategic plan outlines the collective work of the three bureaux over the next three years.

The core aim of our strategy is that

***“Every person in the Falkirk Council area has equal access to the Citizens Advice Service, when required”***

### 2. BACKGROUND & CONTEXT

As three independent organisations we have developed this strategy from our individual forward plans. These reflect the challenging environment in which we work and the many and complex needs of our clients. This joint plan also recognises the strategic context in which we operate, notably the Scottish Government’s Single Outcome Agreement, the UK Government’s Welfare Reform policy, forthcoming changes in debt legislation and Falkirk Council’s Anti-Poverty Strategy. The aims of the Council’s Anti Poverty Strategy noted below are particularly relevant:

- Maximise the number of people in better paid, secure employment
- Reduce levels of debt across the population and maximise the income of households who rely on benefits
- Increase the financial choices available to our population and increase people’s understanding of the consequences of financial choices

A Citizens Advice Bureau has, in one form or another, been serving the residents in the Falkirk Council area for some 40 years. There are currently 3 Bureaux serving the area; a full time office in Falkirk town centre and two part-time offices based in Denny and Grangemouth (Details of main offices and outreach services are provided in appendix 2).

Each CAB is an independent and autonomous legal entity, historically, each with individual Joint Working Agreements with Falkirk Council pertaining to the core CAB service. There are many examples of collaboration between the 3 Bureaux over the years, but always informal.

This Joint Plan has been produced to detail how the three CABs will work more closely together to meet the challenges identified in Falkirk Council's Anti-Poverty Strategy and to achieve the wider aims of the CAB service in the Falkirk area.

In this context of closer working relationships it has still to be recognised that each Bureau has specific needs to address within the area it represents and a proportion of its activity will therefore be focussed on that geographical area.

### **3. Shared values**

Each bureau subscribes to the principles of membership of Citizens Advice Scotland and sets out how it does this within its own business plan. These principles are therefore shared by all three bureaux and we are committed to adhere to them as we collaborate through this strategy:

**To ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the service available to them, or through an inability to express their needs effectively.**

**To provide a core service as well as various additional services such as Project Work, Community Clinics, and Specialist Services, to meet the needs and priorities of clients and to make best use of the resources available.**

Our values are represented in the 12 CAB principles and these in turn underpin this joint strategy:

- |                   |                            |                         |
|-------------------|----------------------------|-------------------------|
| • Free service    | • Accessibility            | • A voluntary service   |
| • Confidentiality | • Effectiveness            | • Empowerment           |
| • Impartiality    | • Community accountability | • Information retrieval |
| • Independence    | • Client's right to decide | • A generalist service  |

#### 4. Key strategic themes

In order for us to achieve the core aim of the strategy –“*that every person in the Falkirk Council area has equal access to the Citizens Advice Service, when required*”, we have identified the following range of key strategic themes or areas of operation:

- Joint project development; delivery and funding bids

We recognise that there may be instances when a joint approach to service development and delivery is beneficial from a client and/or organisational perspective. There are already examples of this collaborative approach in project delivery, for example the Patients Advice and Support Service (PASS), the Armed Services Advice Project (ASAP), Energy Best Deal and more recently in 2013, the Falkirk Area Welfare Benefits Advice Support Unit (FAWBSU) in partnership with Falkirk Council’s welfare benefits services, and a targeted mental health project working in partnership with the Falkirk District Association for Mental Health (FDAMH), both funded by the Big Lottery Fund’s Support and Connect programme.

As separate legal entities, collaborative work will often require one bureau to take the lead and where staff are involved, become the “employing bureau” and the roles of all prospective partners must also be agreed and delivered. We have developed a partnership agreement which aims to ease the project development process and can be adapted to suit each joint initiative. This agreement has already been employed in relation to the FAWBSU highlighted above for example. A formal agreement may not always be deemed necessary however, but we will ensure that appropriate decision making processes are established and these will be developed by the three bureaux and their partners where relevant.

It will not always be appropriate to proceed with a joint bid as in some cases an individual application can be more beneficial, for example where the funding is in relation to a bureau specific issue or the amount available does not justify a joint approach. Each bureau will reserve the right to make decisions on this basis but the existence of a common strategy, effective communication channels and procedures, and assessment criteria or project appraisal system will assist the decision making and development process. Criteria may include, for example, whether a joint approach will maximize opportunities to meet the needs of clients, utilise resources more effectively or provide greater value for money.

- Geographical coverage (whole area and target communities)

The three bureaux are committed to the provision of services across the Falkirk Council area and no individual will be turned away on the basis of “catchment area”. The bureaux recognise the need to ensure that our services are available to those most in need and each therefore operates a combination of outreach clinics and home visits to ensure effective coverage of priority areas, engaging with relevant partners where appropriate. Those geographical areas identified as priorities or at risk within Falkirk Council’s Anti Poverty Strategy inform the delivery of our outreach activities as well as the nature and levels of demand identified through our own management information systems.

The three bureaux continue to work in partnership with local organisations to assess needs for community clinics throughout the Falkirk area and will develop where resources permit. Recent developments have led to the set up of advice clinics in Community Learning and Development sites in Slamannan, Bainsford/Langlees, Camelon, Banknock, Bonnybridge, Westquarter and also in Dean Road Health Centre in Bo’ness for example.

The Citizens Advice Direct (CAD) telephone advice helpline is advertised via bureaux and is available to the public out with the normal CABx opening hours.

- Specialist services

At its heart the CAB service is a generalist one however client demand dictates that a degree of specialism is required and between the three bureaux we are able to offer the following:

- Benefits Advice
- Money Advice (debt)

- Income maximisation
- Employment law
- The Patients Advice and Support Service (PASS)
- Armed Services Advice Project (ASAP)
- Legal clinics
- Financial capability
- Fuel Poverty

The whole CAB service will be under increasing pressure from the roll-out of Welfare Reform and the changing debt landscape which is likely to result in increased demand and changes to the way in which advice services are delivered. Securing additional funding, particularly in relation to benefits and money advice will therefore be a collective priority. We are committed to working with Falkirk Council and other key strategic partners to respond to the challenges of Welfare Reform and to prepare for the changes ahead.

- Target groups

Our bureaux routinely work with the most disadvantaged and at risk individuals and we have already identified specific groups and targeted services accordingly. For example in Denny, outreach clinics are provided for Homestart, Grangemouth CAB provide specialist welfare benefits advice to those suffering mental health issues via clinics at FDAMH and Caledonia Clubhouse, and in Falkirk, all three CAB are working with the Council's Community Learning and Development team in various outreach sites. We are also working with Falkirk Women's Aid and Falkirk Carers in developing targeted services for their respective client groups and piloting services with the Addiction Support and Counselling Service. Further exploratory work is ongoing working with gypsy travellers and prisoner's families and we continue to be mindful of those target groups identified in the Council's Anti-Poverty Strategy.

Collectively we will endeavour to ensure that the needs of specific client groups are met through outreach, partnership and enhanced communication and information sharing which will include client profiling.

- Training

We recognise that training for our staff and volunteers underpins the quality and scope of the service CABs provide. There are benefits in co-ordinating training across all three bureaux and development of a joint training plan is ongoing.

- Volunteer recruitment

As volunteer based organisations being able to maintain a healthy level of volunteers is fundamental to the successful delivery of the service. Joint recruitment campaigns for both generalist and specialist volunteers will be undertaken when resources allow but the interviewing and selection process will be conducted on an individual bureau basis.

- Social Policy development

As a joint aim of the Citizens Advice service, the area of social policy represents an ideal opportunity for the three bureaux to work together to make a significant impact on the issues affecting our clients. The bureaux are supported by Citizens Advice Scotland's Community Action Team to raise awareness and to campaign about local issues. But as part of the wider CAB network across Scotland, we will continue to make a fundamental contribution to the national picture through client profiling and social policy reporting.

We propose to build on this work and will examine ways in which a more co-ordinated, collective and effective approach to social policy can be developed to maximise the impact of CABx across the Falkirk Council area in evidencing need, identifying and publicising the issues which affect our clients and working to find solutions.

- Promotion and awareness raising

Each bureau currently undertakes a range of promotional activities such as participation in local events and delivering presentations to interested groups or agencies.

We will develop a marketing plan to ensure that there is cross-Falkirk coverage and develop joint materials which outline the services available and where, when and how they can be accessed. We have currently produced leaflets to advertise our cross-Falkirk Area Welfare Benefits project, and work is ongoing on our websites which will be accessed via a single door access system when live and online.

Our joint working with the Council's Community Learning and Development team also enables bureaux to advertise services via its quarterly magazine.

- Operation & Reporting arrangements

Arrangements to support and facilitate joint working have been in place for some time, notably monthly managers meetings and the Joint Action Group. More recently established is the cross-sectoral steering group for the BLF funded welfare rights project which meets monthly to monitor the progress and report on this new project. We envisage these two groups continuing and being crucial to the implementation and monitoring of this strategy and associated action plan. The monthly managers meetings will continue to provide an opportunity for planning, resolution of any issues and the development of specific initiatives and activities identified in the action plan.

In the case of JAG we would see this as the principle vehicle for monitoring progress and undertaking an annual review of the strategy.

The three bureaux already use standardised reporting methods e.g. CASTLE and PG Debt and this will continue.

- Key Performance Indicators

We recognise the need for measures to be developed to determine the impact of this strategy and the associated action plan. KPIs have now been agreed which are reflected in our joint working agreements (Schedule C) with Falkirk Council. These include:

- No. of clients
- Client financial gains
- Specific welfare benefits enquiries

- Referrals
- No. of outreach sessions
- No. of volunteers

- Partnerships

We are committed to working in partnership with each other and with key agencies including Falkirk Council, DWP, Forth Valley NHS, CAD, Addiction Support and Counselling Service, FDAMH, Alzheimer's Scotland, Falkirk Carers Centre, and CVS Falkirk & District.

Other partnerships being developed include work with the Falkirk Foodbank and project development with the other Forth Valley CABx and the Central Scotland Regional Equality Council exploring joint volunteering, training and interpretation services.

- Referral processes

We subscribe to the Citizens Advice Scotland Referral Procedure which relates to arrangements for referrals between bureaux and to external agencies. This works well but we will monitor practice and any changes through the monthly management meetings, and take account of local arrangements.

## **Conclusion**

We are confident that by delivering the key themes identified in this joint strategy we will achieve the aims of the bureaux and make a significant contribution to the Council's Anti-poverty strategy. We are now in the third year of this strategy and Appendix 1 provides the detail of our ongoing Action Plan.



## FALKIRK CITIZENS ADVICE BUREAUX JOINT ACTION PLAN YEAR 3

Key themes of strategy	Task	Responsibility	Action & Timescale
<b>Joint projects &amp; funding bids</b>	Cross bureau service provision at Forth Valley Hospital	Manager's group	Funding applications to date have been unsuccessful however, this will now be met via the FAWBSU project
	Energy Best Deal	Manager's group	Ongoing; new projects being delivered over 2014/15
	ASAP delivery	Manager's group	Ongoing
	PASS delivery	Manager's group	Ongoing
	Pursue other project welfare reform, financial Inclusion and debt advice funding in response to client need	Manager's group	Evidence of need gathered; funding application/s pursued mid to late 2014 as necessary
	Explore project development/participate in pilot work with the Addiction Support and Counselling Service	Manager – Denny CAB	April 2014
	Develop joint volunteering/translation service project in collaboration with other Forth Valley CABx and CSREC	Manager's group/CAS	2014
<b>Geographical coverage</b>	Review outreach services and develop on basis of need and resources available	Manager's group and Partner organisations	Ongoing

<b>Target groups</b>	Undertake client profiling exercise	Managers group	Ongoing
	Explore project development/participate in pilot work with:  - gypsy travellers - prisoner's families	Falkirk CAB "	Initial discussions March/April 2014
	Identify opportunities for targeted outreach work with relevant local partner organisations	Manager's group	Ongoing; Further develop via FAWBSU where appropriate
<b>Promotion &amp; awareness raising</b>	Undertake joint marketing opportunities to raise awareness of the range of services available via bureaux; include opening hours and access routes	Managers group & Falkirk Council	Launch websites  Fliers produced by Council to promote FAWBSU and other services available via CABx
<b>Training</b>	Implement joint training plan for volunteer and staff training	Managers group/CAS	To be completed for 2014/15
<b>Volunteer recruitment</b>	Undertake joint volunteer recruitment campaign	Managers group	Throughout year but targeted campaign in line with Volunteers Week June 2014
	Develop Falkirk wide volunteer programme with Stirling University	Managers group / Stirling University	Work experience placements provided for students; Annually
<b>Social policy</b>	Further develop links with CAS Social Policy to identify and take forward local campaigning	Managers group /CAS	Ongoing and as necessary
	Participate in Child Poverty Action Group	Manager's group	2014

	Early Warning System research study		
<b>Operation &amp; Reporting</b>	Maintain regular Manager's meetings	Manager's group	Monthly
	Maintain JAG meetings	JAG Chair	Meet approx quarterly
	Report on agreed Key Performance Indicators	Manager's group	Quarterly report to Council
	Report to scrutiny panel	JAG	June 2014
	Explore in partnership with other local agencies a client signposting and referral tracking system	Falkirk Council/ Manager's group	2014
	Maintain membership and attendance on FAWBSU steering group	Manager's group	Ongoing
<b>Partnerships</b>	Continue to identify relevant strategic and operational partnerships		
	DWP Customer Representative Group	Manager's group	Approximately quarterly
	Forth Valley CABx and CSREC	Manager's group	As necessary
	Jobcentre+	Manager's group	Being developed

**FALKIRK DISTRICT CAB SERVICES**

There are three Citizens Advice Bureaux serving residents of the Falkirk Council area:

Name: Denny & Dunipace Citizens Advice Bureau Ltd  
 Address: 24 Duke Street, Denny  
 Legal Status: Company Limited by Guarantee, Registered Charity  
 Company Number: SC126239  
 Charity Number: SC004864  
 Date Established: 1977  
 Date Incorporated: 1990

Name: Falkirk Citizens Advice Bureau Ltd  
 Address: 27-29 Vicar Street, Falkirk  
 Legal Status: Company Limited by Guarantee, Registered Charity  
 Company Number: SC148330  
 Charity Number: SC006183  
 Date Established: 1994  
 Date Incorporated: 1994

Name: Citizens Advice Bureau (Grangemouth & Bo'ness) Ltd  
 Address: 1 Kerse Road, Grangemouth  
 Legal Status: Company Limited by Guarantee, Registered Charity  
 Company Number: SC126238  
 Charity Number: SC013233  
 Date Established: 1974  
 Date Incorporated: 1995

## CAB OFFICES & OUTREACH

### Denny CAB

#### Main Office

Monday, Wednesday,  
Thursday & Friday: open door 10am – 2pm

#### Telephone Helpline: 01324 823118

Monday to Friday 9am – 8pm  
Saturday 10am – 2pm

*The above telephone opening hours are operated by Citizens Advice Direct (CAD) and do not go direct to the bureau. Protocols are in place between CAD and the CAB for such requirements.*

#### Outreach Clinics

Bridge Crescent (community flat): Facility to complete online benefit applications	Tuesday open door	9. 30am – 12.00 noon 1pm – 3pm
Denny Parish Church Hall:	Wednesday open door	9.30 am – 11.30am
Bonnybridge Community Centre	Wednesday by appointment	11.00am – 2.00 pm
Community Wing, Bankier Primary School: Facility to complete online benefit applications	Thursday open door	10am – 12 noon
Addiction Support and Counselling Service Falkirk	Last Friday every month Referral/Appointment	9.30am – 4.00 pm
Legal Clinic:	Every 4 <sup>th</sup> Wednesday (By appointment only)	4.00 pm – 5.00 pm

## **Falkirk CAB**

### Main office

Monday, Tuesday,  
Thursday, Friday 10am – 4pm open door

Wednesday Appointments only

Saturday 9.30am – 12.30pm

Money Advice:  
(Wednesdays) 1pm – 7pm Appointments only

Legal Clinics:  
(Wednesdays) 5.30pm – 7pm Solicitor open door, Fortnightly

### Community Clinics

Forth Valley Hospital Outreach: Monday, Tuesday, Thursday 10am – 2pm open door

Slamannan  
Community Education Centre: Every 2<sup>nd</sup> and 4<sup>th</sup> Tuesday 1pm – 3pm

Bainsford/Langlees:  
Dawson Community Education Centre: Every 2<sup>nd</sup> and 4<sup>th</sup> Wednesday, 10am – 12 noon

Camelon:  
Community Education Centre Every 1<sup>st</sup> and 3<sup>rd</sup> Thursday, 1pm – 3pm

## **Grangemouth & Bo'ness CAB**

### Main Office (Grangemouth)

Monday	10am – 12pm open door;	12pm – 4pm appointments
Tuesday	10am – 12pm open door;	2pm – 4pm open door
Wednesday	Appointments	Only
Thursday	10am – 12pm open door;	2pm – 4pm open door
Friday	10am – 12pm open door;	12pm – 4pm appointments

Home visiting service by appointment

Telephone Helpline 01324 483467

Monday to Friday 9am – 8pm

Saturday 10am – 2pm

*The above telephone opening hours are operated by Citizens Advice Direct (CAD) and do not go direct to the bureau. Protocols are in place between CAD and the CAB for such requirements.*

### **Legal Clinic**

By appointment only      6.30pm – 8.30pm      Last Thursday of each month

### **Bo'ness Outreach Clinic**

Dean Road Health      2pm – 5pm      Tuesday

Centre      9am – 12noon      Friday

Westquarter Community      10am – 12pm      Tuesday  
Hall

## **List of Abbreviations**

CAB	Citizens Advice Bureau
PASS	Patient Advice & Support Service
ASAP	Armed Services Advice Project
FAWBSU	Falkirk Area Welfare Benefits Support Unit
FDAMH	Falkirk District Association for Mental Health
CAD	Citizens Advice Direct
BLF	Big Lottery Fund
JAG	Joint Action Group
CASTLE	Cases And STatistics Linked Electronically
CAS	Citizens Advice Scotland
CSREC	Central Scotland Regional Equality Council
CVS	Council for Voluntary Service
DWP	Department for Work and Pensions