

Aberdeen CAB Business and Development Plan

Name of Bureau Aberdeen Citizens Advice Bureau Limited

Title of Plan Three Year Business Plan

Timescale 1 January 2017 – 31 December 2019

Address	41 Union Street Aberdeen AB11 5 BN
Telephone number	01224 569750
Fax Number	01224 210510
E-mail Address	bureau@aberdeencab.casonline.org.uk
Website	www.aberdeencab.org.uk

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1. COMPANY DETAILS

Name:	Aberdeen Citizens Advice Bureau Ltd
Address:	41 Union Street Aberdeen AB11 5BN
	Telephone: 01224 569750 Fax: 01224 210510 E-mail: bureau@aberdeencab.casonline.org.uk
Legal Status:	Incorporated Body, Limited by Guarantee
Incorporated:	8 March 1990
Company Number:	123593
Charity Number:	SC009674
Chairperson:	James Henderson
Vice Chairperson:	Florinda Sodani
Hon Treasurer:	Dr Nigel Dower
<i>Bureau Manager:</i>	Zara Strange
Bank:	Clydesdale Bank Plc 62 Union Street, Aberdeen
Auditor:	SBP Accountants and Business Advisers 49 Carden Place, Aberdeen

2. EXECUTIVE SUMMARY

In formulating this business plan we have consulted and responded to comments, suggestions and criticisms from clients, volunteers and staff through a survey undertaken in March 2016 along with our funders and other agencies in our area of operation. The bureau will continue consultation in reviewing the services it provides.

Aberdeen CAB is a strong and healthy city-wide bureau which also has some of the characteristics of a rural bureau. It is one of Scotland's largest bureaux and is moderately funded.

Its main areas of operation are those traditionally served by all CABx, with 25% of its services covering debt related advice. Additional resources are required to meet the increasing demands on this busy bureau but the Board are conscious that funding will be an issue during the period of this plan.

Aberdeen CAB's services have remained stable over the last 3 years despite funding becoming increasingly difficult due to the ongoing economic climate. The bureau's core funding from Aberdeen City Council has benefited from a moderate increase in 2016/17 but this has not been sufficient to keep pace with inflation. Project work that is due to come to an end or will have to be re-negotiated in 2017/18 are the In-house and the Outreach Debt Projects funded by Aberdeen City Council, the Welfare Rights Project and the Macmillan Cancer Centre Project

3 INTRODUCTION, MISSION, VALUES AND VISION

Aberdeen CAB is one of the largest single bureaux in Scotland in terms of client contacts. The bureau is a member of Citizens Advice Scotland; it and its member CABx form Scotland's largest independent advice service. The Aberdeen bureau has grown over the last ten years and it is envisaged that depending on the financial and volunteer resources available over the next three years, its services will continue to expand and develop.

Human resources of staff and volunteers remain robust and our business premises are in sound and effective condition for our requirements although they are, at times, too small to meet client demand.

Our aim is to provide a quality service with integrity, trust and good stewardship, through a team of trained volunteers and paid staff.

Our Mission is to ensure that individuals do not suffer through ignorance of their rights and responsibilities or the services available, or through an inability to express their needs effectively. We provide free, independent, confidential and impartial advice and information to the citizens of Aberdeen and its environs that is accessible and tailored to meet the needs

of the community regardless of disability, gender, race, sexual orientation, age, transgender, religion and belief.
Our vision is for a fairer Scotland where people, as citizens and consumers, are empowered and their rights respected and to achieve this by exercising a responsible influence on the development of social policies and services both locally and nationally.

The agreed Strategic Aims for the Bureau for 2017 – 2020 are:

3.1 To maximise the ability of the Bureau to meet the growing demands for its services by ensuring sufficient volunteer advisers, staff and facilities are in place, within budget and making maximum use of a multi-channel approach for clients to access information and advice that helps them understand their situation and decide how best to proceed.

3.2 To work in partnership with other agencies to address the impact of changes to welfare and other legislation on communities, families and individuals and increase the awareness of the Bureau's services amongst potential partners, clients and funders.

3.3 To exercise a responsible influence on the development of social policies and services, both locally and nationally

Underpinning all these aims to ensure the Bureau remains financially viable

4. BACKGROUND/ HISTORY

Aberdeen CAB was founded in 1939, and served the urgent wartime needs of the people of Aberdeen. The bureau did not operate full time and did not occupy its own premises, working mainly from a number of locations including the City's Music Hall.

It achieved much and became an established organisation offering valuable advice and direct support to the citizens of Aberdeen. Since then it has operated and outgrown a series of premises until its move in November 2004 to its current purpose designed building in Aberdeen's Union Street.

The work load has always been high and enquiries have been increasing in complexity. Despite the reputation of Aberdeen as a wealthy city with high levels of employment, this reputation masks substantial deprivation experienced by many local people.

Aberdeen Citizens Advice Bureau therefore deals with the whole range of issues and problems faced by bureaux in other areas of Scotland.

Aberdeen City Council is the Bureau's primary funder, however Aberdeen CAB has also been awarded additional funding by the Aberdeen City

Council's Fairer Aberdeen Fund to provide Debt and Benefits Advice in the city's regeneration areas, by Macmillan Cancer Support for cancer patients and their families and by NHS Grampian for an independent healthcare complaints service. Aberdeen CAB is the largest single provider of free, independent money advice services in the region.

Overall, the bureau dealt with 6,609 debt-related enquiries in 2015/16.

Employment problems form a significant part of Aberdeen CAB's workload and the bureau is a main provider of free tribunal advice and representation in Aberdeen.

The bureau provides an advice service for patients and staff at Aberdeen Royal Infirmary and Woodend Hospital and supports an outreach project at Calsayseat Medical Practice. A collaboration with the Macmillan Trust and The Pension Service to support those with cancer began in 2006 and has been renewed every year since. A number of local solicitors provide free 20 minute interviews with clients who need specialist legal advice and 5-Star International, a Glasgow based legal firm, provide monthly immigration clinics to clients on a pro-bono basis.

The bureau works in partnership with GREC who refer employment cases and give assistance with discrimination issues and with a range of other agencies across the city who refer clients to the bureau for advice and information.

5. Context, Personnel and Financial Management

Aberdeen CAB dealt with 13,102 enquiries in 2015/16 through 110 volunteers and 31 full-time, part-time paid and project staff, from premises situated in the centre of Aberdeen City and other locations. The Aberdeen Bureau has the largest number of volunteers of any single bureau in Scotland. Their contribution amounts to over 700 hours per week. The initial training of new advisers and in-service training for them and the bureau's paid staff is a significant part of the bureau's Operation.

Over the period of the period 2016-2018, it is anticipated that a new electronic case recording system will be introduced by Citizens Advice Scotland to all Scottish bureaux

The bureau deals with enquiries on topics as diverse as Benefits, Consumer Issues, Employment, Housing, Eviction, Debt, Legal Matters, Relationships, Divorce, Separation, Immigration and Taxation. In 2015/16 monies and financial benefits gained on client's behalf in respect of refunds, additional benefit income, written-off debt, outstanding wages and tribunal settlements amounted to £3,556,775.

By arrangement with Citizens Advice Direct the bureau has greatly extended the opportunities for telephone advice for Aberdeen citizens. This service operates Monday to Friday 9:00am to 8:00pm and Saturday's 10:00am to 2:00pm at local call rates and is in addition to the bureau's own telephone service

Aberdeen City Council is the primary funder of the Aberdeen Bureau. Other funders include the Citizens Advice Scotland, Macmillan Cancer Support, Poppy Scotland and NHS Grampian.

Most of the project funding is time limited and consequently the future of some projects is uncertain.

Whilst there remains concern about the level of core funding which will be available in the next few years given the pressures on local government finance, the Bureau and Aberdeen City Council have agreed a service level agreement, which also comes up for renewal in March 2016.

The bureau's premises in Union Street are currently operating almost to capacity. The eight interview rooms are in constant use and it is necessary on occasion to use additional rooms not designed for that purpose. It is unlikely in the current financial climate that additional funds will become available to acquire additional accommodation, however the bureau will examine other possibilities for extending its service by outreach work.

Aberdeen CAB is a company limited by guarantee administered by a Board of Directors. The Board consults on the policies and operation of the bureau with the paid staff, volunteers, funders, related statutory and voluntary organisations and clients through regular questionnaires. The Board has a wide range of business, professional and political experience and includes local representatives of special interest groups, council members, paid and voluntary staff.

The Treasurer prepares the annual budget, regular cash flows and quarterly accounts to ensure that the bureau remains solvent.

6. OBJECTIVES AND SERVICES

6.1 Objectives

The bureau has already met the following objectives set out in the previous Business Plan for 2013-2015

- To remain financially viable throughout the period of this plan.
- To establish reserves of 25% of its running costs as advised by Citizens Advice Scotland and Aberdeen City Council
- Obtain funding to maintain the second Volunteer Support Worker post
- Maintain the number of volunteer adviser and administrative staff at a level which will allow the bureau to meet the growing demand for its services.
- Produce a programme and financial plan for the replacement of equipment.
- Consider how the development of outreach work could extend the bureau's services to other areas of the city.
- Introduce of the CASTLE computerised client and statistical recording system.

The following are the Boards objectives for the period 2016-2018

Strategic Aim 1

To maximise the ability of the Bureau to meet the growing demand for its services:

- Maintain the number of volunteer advisers and administrative staff at a level which will allow the bureau to meet the growing demand for its services
- Maintain the bureau's opening hours and review annually how appropriate they are for our needs
- Be prepared to respond to initiatives developed by staff, government or other agencies
- Consider how the development of outreach work could extend the bureau's services to other areas of the city

Strategic Aim 2

To work in partnership with other Agencies

- Enter into Service Level Agreements with funders as appropriate.
- To continue to develop partnership working with new agencies in Aberdeen

Strategic Aim 3

To exercise a responsible influence on the development of social services and policies

- Support volunteer Social Policy Officer to highlight local and national issues
- Continue and expand Bureau representation at local partnership and local authority meetings.
- Provide regular feedback on local social policy issues to elected councillors.

Underpinning all Strategic Aims

To ensure the Bureau remains financially viable

- To maintain reserves of 25% of its running costs as advised by Citizens Advice Scotland and Aberdeen City Council
- Maintain a programme and financial plan for the replacement of equipment.

6.2 Services

- Aberdeen CAB provides the full range of CAB services from its bureau in Union Street and in addition also provides outreach services at
- Woodend Hospital -Housing & Generalist advice
- ARI -Housing & Generalist advice
- Roxburghe House -Welfare Benefits advice
- Calsayseat Medical Practice -Welfare Benefits & Generalist advice

- Seaton Community Centre -Welfare Benefits & Debt advice
- Woodside Community Centre -Welfare Benefits & Debt advice
- Torry Neighbourhood Centre -Welfare Benefits & Debt advice
- Byron Community Centre -Welfare Benefits & Debt advice
- Mastrick Community Centre -Welfare Benefits & Debt advice
- Manor Park School Community Facility -Welfare Benefits & Debt advice

6.3 Partnership Working

Aberdeen CAB has always worked closely with the City Council, NHS, Scottish Government, Macmillan Cancer Support, Immigration Authorities and other agencies to ensure the best provision of services to the community. Recent positive results have been achieved through partnership with other organisations. There is no doubt that partnership working benefits everyone and most importantly our clients.

7 Conclusion

This business plan set out the Board's priorities for the next 3 years. There are a number of uncertainties particularly in relation to funding but the Board is confident with the commitment of its staff and volunteers the bureau will continue to offer a quality service to the citizens of Aberdeen as it has done over the past 77 years.

Aberdeen CAB
Action/Development Plan 2017-2019

Strategic Aim:- To maximise the ability of the Bureau to meet the growing demands for its services by ensuring sufficient volunteer advisers, staff and facilities are in place, within budget and making maximum use of a multi-channel approach for clients to access information and advice that helps them understand their situation and decide how best to proceed.

Planned Activity/Inputs 2017-2019	Key Tasks	Owner	Timescale
Maintain required number of volunteer advisers and administrative staff	Have a minimum of two volunteer adviser intakes per year	Bureau Manager	Ongoing
	If the waiting list for new advisers drops then consider promotions and advertising	Bureau Manager	Ongoing
Maintain and review opening hours etc	Annual review by board and bureau management based upon statistical evidence	Board of Directors	On-going
	Review comments and requests from partners – including financing of proposed changes	Bureau Manager	On-going
Undertake research into current waiting times for clients using the drop in service, including drop-out rates, to identify specific busy periods and plan accordingly			

Aberdeen CAB
Action/Development Plan 2017-2019

Strategic Aim:- To work in partnership with other agencies to address the impact of changes to welfare and other legislation on communities, families and individuals and increase the awareness of the Bureau's services amongst potential partners, clients and funders			
Planned Activity/Inputs 2017-2019	Key Tasks	Owner	Timescale
Enter into Service Level Agreements with funders as appropriate	Receive daily public contract reports for Aberdeen City Area	Bureau Manager	On-going
	Liaise with Aberdeen City Council on project opportunities	Bureau Manager	On-going
	Liaise with NHS Grampian on project opportunities	Bureau Manager	On-going
To continue to develop partnership working with new Agencies in Aberdeen	Attend partnership meetings in Aberdeen City and North East Scotland	Bureau Manager	On-going
	Liaise with Citizens Advice Scotland on new partnership opportunities	Bureau Manager/ CAS Liaison Officer	On-going

Aberdeen CAB
Action/Development Plan 2017-2019

Strategic Aim:- To exercise a responsible influence on the development of social policies and services, both locally and nationally			
Planned Activity/Inputs 2017-2019	Key Tasks	Owner	Timescale
Support volunteer Social Policy Officer to highlight local and national issues			
Continue and expand Bureau representation at local partnership and local authority meetings			
Provide regular feedback on local social policy issues to elected councillors	Identify top 3 social policy issues within Aberdeen City	Bureau Manager	
	Include updates in the quarterly report required by the Council in the SLA	Bureau Manager	

Aberdeen CAB
Action/Development Plan 2017-2019

Strategic Objective:- Underpinning all these aims to ensure the Bureau remains financially viable			
Planned Activity/Inputs 2017-2019	Key Tasks	Owner	Timescale
To maintain reserves of 25% of its running costs as advised by Citizens Advice Scotland and Aberdeen City Council	Monthly management reporting to Board	Bureau Manager	Monthly
	Monthly financial reporting to Board	Treasurer	Monthly
Maintain a programme and financial plan for the replacement of equipment		Board of Directors	Annually