



Stirling District Citizens Advice Bureau Ltd Strategy Paper - June 2021 – June 2024

Context: Five themes were identified, examined & developed by the Strategic Working Group comprising of trustees, staff & frontline advice volunteers:

- **Services that support our Community** - Understanding the advice needs of Stirling citizens / Building proposals to meet these needs / Piloting new advice capability
- **Service Delivery in a post COVID world** - Defining a post COVID operating model / Building capacity and optimising delivery to serve more clients / Maintain & support high quality of advice
- **Developing our volunteer base** - increased number of volunteers and services they are support / Improving volunteer training and development / Better engagement with our volunteers / Encouraging volunteers to support business functions
- **Expanding our funding base** - Build our capability to deliver grant applications / Create sustainable funding models where possible / Pilot new models and ways of generating income / Increase influence with key funding groups / Demonstrate the impact of Stirling CAB
- **Being A Great Place to Work or Volunteer** - Delivering a great working environment and culture / Ensuring systems and processes work / Improving engagement through all levels of the CAB

The following factors exert a significant influence on the strategic aspirations of the Bureau, and these were considered as widely as possible by the group when they were examining the themes, namely the Political; Economic; Social; Technical; Legal & Environmental conditions.

Introduction

The COVID 19 pandemic has fundamentally changed the way Stirling District CAB can safely deliver advice services. Its socio-economic & psychological impact has increased client numbers, changed client attitudes to service delivery, reduced client confidence in face-to-face services and increased the complexity of presenting issues. Stirling District Citizens Advice Bureau Ltd's aim is 'to develop and maintain a high quality, best Value advice service within Stirling Council area that works co-operatively with new and existing partner organisations to improve quality of life for Stirling Council area residents. Thus, collaboration and partnership are at the core of our plans. Current partners include Citizens Advice Scotland, Action in Mind, Stirling University, Change Grow Live, Stirling Libraries Service, Carers Centre, Forth Valley NHS, Stirling Women's Aid and Start-Up Stirling. In addition to building on existing partnerships, our future plans envisage joint bids and collaboration with new partners including Stirling Council, Social Security Agency for Scotland, Wellbeing Scotland & the Sensory Centre.

The impact of the economic legacy of the pandemic & Brexit, particularly across the key employment themes of Service, Hospitality, Tourism & Agriculture, is anticipated to be both severe & long lasting. As such our strategy is framed within the anticipated political, economic, social & environmental context over the next three years. In particular, Stirling District CAB will focus its activity within the following areas over the next three years:

- Developing Volunteer led Generalist Advice Services to meet the core on-going demand for Types I and II advice and support, part-funded by Stirling Council

- Colocation & innovative & progressive collaboration with stakeholders & partners to develop services & funding streams that are mutually beneficial & support the post pandemic & ongoing support needs of the citizens of Stirling.
- Enhance & develop the learned models of virtual /remote advice giving – telephony, email, web chat, web form & video conferencing platforms & future proof the organisations delivery model against further pandemics
- Develop a Stirling District CAB Community Legal service to complement the advice & representation work of the Stirling District CAB, to enhance representation to post pandemic unmet legal need and to improve access to social justice for Stirling citizens
- Developing a rural Satellite Stirling District CAB in Callander to provide a local access point & community hub to support the more remote areas of Stirling District
- Develop a university-based Stirling District CAB service to address unmet need amongst the student population – primarily debt, housing & employment rights
- Provide accessible CAB advice services throughout the whole district to housebound people by virtue of physical or mental impairment, childcare commitments or poverty – via outreach & home visiting services to rural communities (face to face & virtual)
- Extend access to Stirling District CAB as widely as possible to other community access points – schools, GP’s, community centres & resource with specialist volunteers & develop Stirling District CAB readily accessible & “being in the right place at the right time”.
- Acknowledging Volunteering as key to delivering our service with the development and deployment of our volunteer capacity and skill
- Supporting the development of Specialist Services to deliver extensions of core services to meet identified local needs – e.g., initially Redundancy Response Unit, Unpaid Carers Welfare Rights Project & others as they are secured
- Enhancing Corporate Development, both to develop and implement a coherent marketing & fundraising strategy and to enhance the governance process.

While we plan to develop our remote services, **this will not compromise the provision of CAB in-person advice services** once the pandemic recedes, and demand rises. Recognising that some of our clients may struggle to access services via remote methods or an appointment system owing to digital exclusion and chaotic lifestyles, the question of restoring a drop-in service will remain under regular review. The relocation of remote services and volunteer training to a new, larger location will free up space at the Norman McEwan Centre to potentially expand our capacity to provide in-person services. This strategy will be integrated into the Business Plan which sets out the future direction of Stirling District CAB. Activity is designed to build on the progress that has been achieved in re-establishing the core organisation over the past 6 years and to develop new strands of support for all Stirlingshire citizens who are in need irrespective of race, religion, income, religious or philosophical belief, sexual orientation or identity, nationality, age, gender or ability.

We will focus on the following Key Priority Areas for Stirling District CAB Strategy 2021 – 2024:

- The **critical** need to develop & diversify the Stirling CAB funding base to ensure future sustainability
- Invest in the **identification and development of high-quality competitive funding proposals** for new areas of business & thus secure resources to support the expansion of Stirling District CAB service activity in response to local needs.

- **Reconfigure & recalibrate Stirling District CAB service delivery** to the most effective post pandemic hybrid model i.e., appointment only safe face to face advice at the city centre contact centre & develop an enhanced virtual CAB at a new site to safely accommodate the number of volunteers, trainee volunteers & staff necessary
- **Volunteer recruitment & training to refresh & expand the volunteer advice frontline** to take account of increasing demand & complexity driven by the COVID19 pandemic, in line with (and at the pace determined by), Scottish Government guidance & Public Health Scotland advice
- Develop & **secure funding for the concept of professional supported volunteering into work** for the economic casualties of the pandemic – Redundancy Response Unit, Springboard into work concept
- Further **development of mutually beneficial partnership and joint working arrangements** aligned to funder's interest areas – e.g. Poverty/Trauma, Economic recovery post pandemic, Reskilling communities
- Continuing **development of the governance arrangements** and *extension of the quality management system* to all aspects of the Bureau's activities.

By developing partnership and joint working arrangements, Stirling District CAB also seeks to ensure the strategic integration of its work with a range of key policy areas at both national and local level. In addition, the value of volunteering and the development of volunteer capacity, skills, confidence, employability and access to further education will be recognised. The Stirling District CAB concept and ethos facilitate a remarkable gearing ratio of trained voluntary staff (who provide the core advisory service), to paid employees (who provide the business structure, project services, administration, quality assurance and training support). Equally important, it assists many of these volunteers back into the work force, as well as improving their self-esteem, their sense of well-being and their inclusion into the community.

Key Priority Areas

Critical need to develop & diversify the Stirling CAB funding base

average per capita investment from a Scottish local authority to its CAB is £2. In Stirling the per capita investment is 84p. Therefore, there is a *critical need* to develop & diversify the Stirling District CAB funding base to ensure future sustainability and reduce reliance on the static public pound. The economic legacy of the pandemic will create opportunities for the Stirling District CAB to do so & to allow it to continue to be innovative, progressive & collaborative in its approach to addressing the advice, information and support needs of the community it serves. In addition to continuing to diversify its funding portfolio, Stirling District CAB will continue to seek to secure a service level agreement with the Council set at an adequate level & term (at least 3 – 5 years) to align with the local authority 3 – 5 yr COVID 19 recovery strategy. Stirling District CAB wishes to develop its services to support the Council and complement their strategy to best support Stirlingshire's citizens recover from the socio-economic legacy of the pandemic. Stirling District CAB will make a significant contribution to the economic recovery of citizens over that period and will seek to work collaboratively with the Council.

The *average Scottish CAB* has a funding split of 70% Local Authority & 30% project funding. Stirling CAB in 20/21 had a split of 11% local authority & 89% project funding. This ratio is unlikely to improve and the strategy going forward has to recognise that in order to sustain the charity and to address the needs of our citizens, we will continue to be collaborative innovative, experimental and progressive. At the same time, we will continue to seek to develop mutually beneficial positive relationships with the key decision makers within the local authority to help Stirling District CAB support the advice needs of the citizens of Stirling.

Invest in the identification and development of high-quality competitive funding proposals for new areas of business & thus secure resources to support the expansion of Stirling District CAB service activity in response to local needs.

To assist Stirling District CAB & to allow it to resource the production of more progressive, collaborative, high quality & competitive funding bids:

A management restructure was completed in 2020 creating a Senior Management Team to focus on operational matters. The role of Deputy Manager was created to look after Core volunteer led advice functions & a Volunteer Coordinator created to look & develop Volunteer related issues. As a result of the restructure the CEO has been freed up to be more outward looking, innovative, collaborative and progressive. A Grants online subscription has been purchased to allow Stirling District CAB to routinely research the evolving funding landscape and to be more proactive in spotting potential funding opportunities. The creation of a Bid support committee of trustees to support the CEO develop competitive funding bids, increases both the volume of & the quality and competitiveness of our funding proposals. Our Social Policy research volunteers and wider volunteer team will be deployed to assist the CEO research CASTLE and the relevant local and national poverty indicators (SMDI, census etc) to help inform & identify unmet need & local and national social & economic trends to help produce more effective & more successful funding proposals. These investments in the identification, research and development of high-quality competitive funding proposals for new areas of business will secure resources to support the expansion of Stirling District CAB service activity in response to local needs.

Further development of innovative & progressive partnership and joint working arrangements

Stirling District CAB enjoys positive partnership relationships with a wide variety of third sector & statutory sector partners - Citizens Advice Scotland, Action in Mind, Stirling University, Change Grow Live, Stirling Libraries Service, Carers Centre, Forth Valley NHS, Stirling Women's Aid and Start-Up Stirling. As competition increases for available funding, Stirling District CAB will as well as maintaining & nurturing existing partnerships, continue to develop further mutually beneficial partnership relationships to improve its prospects of securing investment with new partners including Utility Companies, the wider Legal community, Stirling Council, Social Security Agency for Scotland, Wellbeing Scotland & the Sensory Centre. Stirling District CAB will align its progressive partnerships & singular funding proposals to investors key interest areas primarily but not exclusively – Poverty/Trauma, Economic recovery post pandemic, Reskilling communities, Disability, Discrimination & Disadvantage, Unmet need & Access to social justice

Reconfigure & recalibrate Stirling District CAB service delivery to the most effective post pandemic hybrid model

To future proof the organisation against further pandemics & the potential of a third wave & to adopt the efficient & effective elements of learned best practice of the "Virtual CAB" from operating throughout lockdown Stirling District CAB will secure additional estate (larger area) to allow the safe return of more volunteer advisers to deal with telephone demand & create a safe space for new adviser training to refresh the frontline and address the loss of volunteers to the pandemic. In addition, it will adopt a "Mixed model hybrid" approach to service delivery with a focus on the development of telephone/email/web chat/ web form & video conference advice capacity

Stirling District CAB will also address Digital poverty/digital capability by continuing & broadening the Connecting Scotland program of distributing equipment to those who are digitally excluded. To enhance this area Stirling District CAB will develop a closer /mutually beneficial partnership with Stirling Councils digital inclusion service. Stirling District CAB will also redesign its service delivery model to serve telephone/email/webchat/ web form and "Attend Anywhere" & "Near Me" video conference enquiries. In addition, & to also ensure *critical accessible face to face advice*, in its current, well established city centre location, Stirling District CAB will achieve security of tenure with the landlord at the Norman MacEwan Centre for Voluntary Organisations. In addition, Stirling District CAB will achieve an agreement with the landlord at the Norman MacEwan Centre for Voluntary Organisations, to develop its city centre contact centre for face to face advice work; and develop an appointment only face to face service (& only when all virtual means exhausted/non-viable) at its public facing city centre contact site & incrementally return to drop in face to face advice in line (and at pace) with Scottish Government guidance, Public Health Scotland advice & client confidence.

To support Stirling District CAB with these strategic objectives it will apply for and secure CAS Development capital grant support to in make the new "Virtual CAB site" & the city centre contact centre appropriate for the post COVID operating model

Stirling District CAB will also ensure it aligns its post covid operating models with other partners post covid operating procedures – Food Bank, libraries, NHS sites, Substance misuse treatment centres etc. Stirling District CAB has recognised the collateral damage of the pandemic on its volunteering numbers & will refresh the volunteer adviser workforce & take full advantage of the opportunities the legacy of the pandemic will create in this regard. Remotely enabled volunteer advising was found not to be popular throughout lockdown with returning volunteers due to the challenges & the inherent reward of social contact within volunteering. Our strategic objective should be to secure a space that is fit for the purpose of accommodating & training a higher volume of volunteers to meet the increasing need for CAB advice in our community.

Volunteer recruitment & training to refresh & expand the volunteer advice frontline and develop & secure funding for the concept of professional supported volunteering into work for the economic casualties of the pandemic

There are inherent restrictions within the current Stirling District CAB estate on increasing its volunteer numbers & it is a key requirement to identify and secure more suitable and affordable alternative accommodation, whilst maintaining our established city centre public facing footprint. In order to increase our advice “gearing”, enhance the volunteer training and volunteer experience & accommodate larger numbers of volunteers, Stirling District CAB will assign volunteer adviser support to its project functions & also develop the colocation of volunteers on partners estate – libraries, NHS, Substance misuse centres, Carer’s centre, Food Bank etc.

Stirling District CAB has illustrated that high percentages (up to 60%) of its volunteer workforce move closer to full labour market engagement or secure sustainable employment as a direct result of their accredited volunteer training & exposure to vocational experience within 12 – 18 months of joining CAB. This is a tangible and marketable by product of the CAB advice function. This positive destination and outcome are particularly the case with unemployed volunteers, women returning to the labour market and under employed or unemployed postgraduates. Stirling District CAB will recruit train, support develop and manage new cohorts of volunteers, newly available as a direct result of the economic impact of the pandemic, the end of job retention schemes and redundancy sectors & help them secure new alternative types of employment in the people sector. There will be newly available volunteers particular from the hospitality, service and tourism sector in Stirling and Stirling District CAB will seek to develop a funding stream around this area, building on the concept within the newly funded Redundancy Response Unit.

Investing in Volunteers

Stirling District CAB is the *only one* of the 59 Scottish CABx to hold the Investors in Volunteers accreditation. Stirling District CAB will periodically conduct pulse surveys of volunteers needs and wants to shape its Volunteer Development plan. Stirling District CAB will continue to develop & improve its volunteer policies, practices and procedures in line with Volunteer Scotland’s national best practice & continue to create a well governed and well managed & enjoyable voluntary experience for its most valuable resource, the CAB volunteer. Volunteer training will be enhanced to include shadowing projects to improve understanding of total architecture of CAB. Stirling District CAB will specifically develop & support opportunities for Generalist advisers to become specialists – i.e., Employment rights, Housing Rights, Debt advisers, Welfare Rights & Legal advisers (within the Community Legal Service) and this enhancement will build the employability outcomes for our volunteers and build the capacity of the volunteer advice frontline. The Stirling District CAB Volunteer Coordinator will ensure that volunteers are invested in and supported & that CAB are clear on the individual volunteers motivations & tailor their volunteering experience accordingly.

Volunteer engagement

It is vital that the volunteers feel connected, included, valued & that they influence the strategic direction and shape of the charity as Stirling District CAB is a “volunteer led” organisation supported by its paid staff. The Board will develop and nurture effective communication & positive relationships with frontline volunteers – keeping in touch sessions, attendance at volunteer and staff meetings, biannual Open Space strategic planning sessions, trustee shadowing of the CAB service in action & regular newsletters. In addition, the Articles of association will be refreshed to allow more active volunteer participation on the Board to shape its strategic direction and volunteers will be proactively sought to and will be supported to participate in reference groups by category, short life working groups & Board subcommittee work.

The continuing development of governance arrangements, and the extension of the quality management system to all aspects of Stirling District CAB activities.

The Board will continue to proactively develop and enhance its Governance arrangements in line with OSCR, Volunteer Scotland and Citizens Advice Scotland's best practice. This will be a fully inclusive and transparent process and will involve engagement with short life volunteer inclusive working groups, biannual Open Space meetings and consultation. A Governance documentation suite will be created and a proactive update & review process & control process will be established to ensure effective and efficient governance and compliance with key stakeholders – OSCR, Stirling Council, Insurance providers, Citizens Advice Scotland, Volunteer Scotland and Scottish National Standards for Information and Advice providers.

The Risk Management subgroup, CEO & Senior Management Team will create, ensure the universal understanding and the appropriate implementation and maintenance of a documentation Suite for the following three themes of the Stirling District CAB operation amongst all staff & volunteers:

- Operational policies, practices and procedures – owned by Deputy Manager
- Volunteering Policies Practices and Procedures – owned by Volunteer Coordinator
- Health and Safety Policies, Practices and Procedures – owned by CAB Annex Operational Manager

The Documentation Suite will be overseen by the CEO & monitored by the Risk Management subgroup and it will be subject to a robust and proactive monthly update & review process & a control process will be established to ensure effective and efficient maintenance and compliance with key stakeholders – OSCR, Stirling Council, Insurance providers, Citizens Advice Scotland, Volunteer Scotland and Scottish National Standards for Information and Advice providers. Stirling District CAB is subject to a robust quarterly Citizens Advice Scotland Quality of Advice Assessment process extension of the quality management system & the established Quality Assurance systems account for 100% compliance. We will maintain this process.

The CEO, Finance Office / Administrator and the thematic owners of the Documentation Suite will implement a process of proactive update, monitoring, control and Quality Assurance of the policies, practices and procedures for Stirling District CAB to ensure that staff and volunteers are fully aware of interpretation in practice and that they are deemed fully compliant with the key stakeholders - OSCR, Stirling Council, Insurance providers, Citizens Advice Scotland, Volunteer Scotland and Scottish National Standards for Information and Advice providers.