



# Service Delivery and Development Plan

2016 - 2019

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## Introduction

Sheffield Citizens Advice is Sheffield's leading provider of advice and advocacy services. Our services help over 20,000 people a year, including 3,000 helped by our advocacy services. We are here for all citizens, and make sure that our services are available to the people and communities that need them most.

The need for our services is growing. The Government's new phase of welfare reforms, growing poverty and inequality, and the continued prevalence of precarious low paid work for many – all mean that growing numbers of people need our help.

We have made great strides over the past two years towards achieving our goals. We know, though, that we have more to do to meet our clients' needs in the most effective ways possible. We must improve our Advice Line and develop digital services. We must find much better premises. We must continue to support and develop our paid staff and volunteers. We must find new opportunities, including to provide new services.

This plan is about rising to these challenges.

We have summarised our plan "on a page" overleaf, and in the remainder of the plan describe our priorities and the action we will take about these, as well as our workforce, volunteering and financial plans.

We are looking forward to the year ahead, and to making further progress towards realising our purpose and ambition.

# Sheffield Citizens Advice

## Service delivery and development plan

### Our purpose and ambition

We tackle poverty and campaign for social justice

We help people, families and communities by:

- providing advice and advocacy to help people solve the problems they face
- campaigning to improve the policies and practices that affect people's lives

We aim to be one of the best advice and advocacy services in the country, and one of the leading voluntary and community sector organisations in Sheffield.

### Our strategy is to do six big things:

- |                         |  |   |                        |   |                                       |
|-------------------------|--|---|------------------------|---|---------------------------------------|
| Reshape advice services | Strengthen mental health advocacy services | Support and develop our paid staff and volunteers | Transform our premises | Develop new services and secure new funding | Campaign for changes to public policy |
|-------------------------|--|---|------------------------|---|---------------------------------------|

### We will reshape our advice services by:

- achieving the best balance between on-line, phone, drop-in, appointment and casework services
- improving the client journey to make access easier, reduce waiting, and so provide the help people need more quickly
- improving our system and processes so that we can be as efficient as possible
- clarifying our priorities, so that the people who most need help receive it quickly
- developing a network with other advice services and complementary services so that we can all direct people to the best source of help

### We will strengthen our mental health advocacy services

### Our strategy will be supported by:

- |                         |                 |                             |                             |                                     |   |                                      |
|-------------------------|-----------------|-----------------------------|-----------------------------|-------------------------------------|---|--------------------------------------|
| Performance improvement | Good governance | Effective quality assurance | Robust financial management | Better communication and engagement | Effective communication and information systems | Friends of Sheffield Citizens Advice |
|-------------------------|-----------------|-----------------------------|-----------------------------|-------------------------------------|---|--------------------------------------|

## Strategic context and outlook

We have taken stock of the strategic context within which we operate, and the principal strategic opportunities and challenges we face.

Major changes to welfare benefits policy and housing policy, growth in poverty and continuation of precarious, low paid employment all suggest that the need for our services will continue to grow

We have made good progress towards changing the way we provide advice services – but implementation of these changes is now needed to improve client care, journey and experience.

We have made less progress towards improving our phone services, and towards developing a digital service. We must make progress with these in the year ahead, including assisted digital services for people who are digitally excluded

Our advocacy services have grown significantly and have performed well, and we have become the principal advocacy service provider in Sheffield. We now face the likelihood of most if not all these services being recommissioned for April 2017, and so must prepare to tender to continue to provide these services.

Our premises remain a significant impediment to achieving our goals. We must make progress towards much better premises, and capitalise on this to transform services

We have continued to stabilise our financial position, with a good outturn forecast for 2015/16. However, we need to identify what action to take during 2016/17 to sustain this. We face the possibility of being unable to replace significant funding that comes to end during 2016/17, and many of our funders will themselves be under continued pressure. We must prepare to manage the consequences of this.

We continue to command the support of commissioners and funders. We must, though, do more to demonstrate our outcomes and impact, so that we can prove our worth.

We must develop new services, for example in partnership with the NHS.

We have taken steps to improve our partnerships, including within the voluntary sector, but have much more to do to realise the opportunities this presents.

Citizens Advice is expected to introduce a new membership agreement for 2017/18, which will require agreement about our contribution to national services – for example Advice Line.

We have significantly improved our legal services, which have successfully passed three external audits. We must now build upon this, maintaining our membership of the Law Centres Network and the advantages this confers

We are expecting new opportunities to emerge – for example for consumer services, and victim referral – some on a wider footprint. We must prepare to tender for these services, for which digital and call centre capability will be essential.

## Progress in 2015/16

Our plan for 2015 said that our strategy was to do seven big things, supported by numerous other actions. We have taken stock of progress with these priorities and other actions.

### Progress with our strategic priorities

	What have we done?
<b>Reshape advice services</b>	<ul style="list-style-type: none"> <li>• Introduced new standards for what people can expect from us</li> <li>• Prepared for the introduction of “initial checks” as a better way of asking what help people are seeking, and getting this help to them more quickly</li> <li>• Prepared for establishing a new call centre for Advice Line</li> </ul>
<b>Strengthen mental health advocacy services</b>	<ul style="list-style-type: none"> <li>• Expanded our mental health advocacy team, with xx new advocates</li> <li>• Introduced better referral and case allocation systems, which have helped tackle waiting times</li> <li>• Introduced new advocacy services</li> </ul>
<b>Support and develop our paid staff and volunteers</b>	<ul style="list-style-type: none"> <li>• Consolidated our new pay, terms and conditions, which are now applicable to nearly all our paid staff</li> <li>• Strengthened the benefits we offer paid staff, for example offering the Westfield health scheme</li> <li>• Introduced new policies and procedures for recruiting and supporting volunteers</li> <li>• Sustained our extensive training programme</li> </ul>
<b>Campaign for changes to public policy</b>	<ul style="list-style-type: none"> <li>• Continued to support lobbying about benefits sanctions</li> <li>• Successfully lobbied for a change to the way the DWP informs local authorities about benefits which have been sanctioned</li> <li>• Published our report about Personal Independence Payment</li> <li>• Successfully lobbied for a change to the regulations for PIP for some people who are terminally ill</li> </ul>
<b>Transform our premises</b>	<ul style="list-style-type: none"> <li>• Made positive progress with plans and negotiations for new premises</li> <li>• Planned much needed improvement to our London Road office</li> <li>• Planning to open a call centre at the Circle</li> <li>• Exited our former premises at Broadfield Road</li> </ul>
<b>Secure new funding</b>	<ul style="list-style-type: none"> <li>• Implemented the new Pension Wise service across South Yorkshire</li> <li>• Implemented our advice in foodbanks service, and secured £370k from the Big Lottery Fund to sustain and expands this service until 2020.</li> <li>• Implemented our new Deaf Peer Mentoring project, also funded by the Lottery</li> </ul>
<b>Launch the “Friends of Sheffield Citizens Advice”</b>	<ul style="list-style-type: none"> <li>• Launched the “Friends of Sheffield Citizens Advice”</li> <li>• Recruited over 100 Friends by the end of the year</li> <li>• Issued our first Friends bulletin in February 2016</li> </ul>

## Progress with supporting priorities

	What have we done?
<b>Performance improvement</b>	<ul style="list-style-type: none"> <li>• Sustained the effective delivery of all services</li> <li>• Introduced more robust performance management systems</li> <li>• Improved our debt service, to achieve almost 90% of the annual target, and ensure we can achieve 100% in 2016/17</li> <li>• Turned round our improving financial confidence project</li> <li>• Improved the number of cases for which we can obtain legal aid</li> <li>• Improved advocacy services performance, to support more clients and reduce waiting times</li> <li>• Steadily improved the Pension Wise caseload, so that our service is among the best performing nationally.</li> </ul>
<b>Quality improvement</b>	<ul style="list-style-type: none"> <li>• Developed our use of the new Quality of Advice Assurance process, and used this to improve quality</li> <li>• Responded positively to complaints, and acted on learning about clients' experience of using our service</li> <li>• Developed a new case checking policy and process</li> <li>• Secured the Specialist Quality Mark for our legal services</li> <li>• Secured "competence plus" from the Legal Aid Agency peer review of our legal services</li> </ul>
<b>Knowledge and information</b>	<ul style="list-style-type: none"> <li>• Sustained our extensive training programme</li> <li>• Introduced new training, for example for universal credit and for personal independence payment</li> </ul>
<b>Financial management</b>	<ul style="list-style-type: none"> <li>• Completed all the work needed to secure effective financial management</li> <li>• Stabilised our overall financial position</li> <li>• Secured a good financial outturn, much improved from our mid-year forecast</li> <li>• Secured new funding, most significantly from the Big Lottery Fund for advice in foodbanks</li> </ul>
<b>Governance and accountability</b>	<ul style="list-style-type: none"> <li>• Held regular Board meetings, with a better balance between strategic development, performance management and assurance</li> <li>• Appointed two new trustees</li> <li>• Introduced two new committees – finance, audit and risk; and quality, outcomes and impact</li> <li>• Participated in Citizens Advice's new leadership self assessment, and secured a good outcome to our Citizens Advice audit</li> <li>• Completed the introduction of a comprehensive suite of organisation wide policies and procedures</li> <li>• Published our second Annual Review</li> </ul>
<b>Engagement and communication</b>	<ul style="list-style-type: none"> <li>• Held two staff conferences</li> <li>• Introduced monthly staff briefings</li> <li>• Introduced bi-monthly managers and supervisors forums</li> <li>• Strengthened our relationship with voluntary sector partners</li> <li>• Played a key role in Sheffield's Thriving VCF leadership group, and wider leadership networks, and in the voluntary sector's Working Together conference</li> <li>• Played a key role in establishing the Citizens Advice Core Cities group</li> </ul>

## Our ambition and priorities

We want to be one of the best.

We want everyone who asks for our help to feel welcome and at ease. We want our services to be available to everyone who needs them, and to make sure our services are targeted as those in greatest need. We want to reach out to vulnerable and excluded communities.

We want our services to be easy to access, and our staff and volunteers to be very approachable and responsive. We want to reduce waiting times, for the help we give to be correct, and to get the right balance between providing information and brief interventions and providing in-depth advice and support. We want to help people to overcome underlying problems. We want to integrate our services with the other services people use.

We want our staff and volunteers to be knowledgeable and skilled, and to be happy and feel appreciated and valued.

We want to be known for providing great service and exceeding expectations, and for providing value for money. We want to be innovative and adaptive, courageous and imaginative. We want to bring about change for the better. We want to convey the passion we feel about what we do – helping people, tackling poverty and improving social justice.

We know that we have much more to do to achieve this ambition. To succeed we know that we must focus on the most important things. This is why in our service delivery and development plan for 2015, we said that we would focus on seven big things in 2015/16 and the next two years. We have reviewed these priorities, and have decided on a small number of changes.

We will focus on six priorities:

- Reshape advice services
- Strengthen mental health advocacy services
- Support and develop our paid staff and volunteers
- Transform our premises
- Develop new services and secure new funding
- Campaign for changes to public policy

We will continue to support these priorities with:

- Performance improvement
- Good governance
- Effective quality assurance
- Robust financial management
- Better communication and engagement
- Effective communication and information systems
- Expand the “Friends of Sheffield Citizens Advice”

## Priorities for 2016/17 – 2018/19

### Strategic priorities

We will play a leading role in Sheffield and further afield. We will, through our contributions to the Sheffield Partnership Board, Sheffield Thriving Third Sector Group, Fair City Campaign, Tackling Poverty Strategy and the wider voluntary and community sector, seek to influence and support the city's strategies and action to tackle poverty and improve social justice. We will do the same via the emerging Sheffield City Region, and, with the new Core Cities Citizens Advice group, nationally.

	<b>What will we do?</b>
<b>Reshape advice services</b>	<ul style="list-style-type: none"> <li>• Transform our Advice Line, with new call centre, expanded staff and volunteer team and much better call answering</li> <li>• Introduce new “initial checks” for everyone who uses our drop in service</li> <li>• Consolidate all our advice policies and procedures, and ensure these are consistently adopted by all our services</li> </ul>
<b>Strengthen mental health advocacy services</b>	<ul style="list-style-type: none"> <li>• Sustain the improved performance of our advocacy services</li> <li>• Prepare for the anticipated re-commissioning our advocacy services, working in partnership with other voluntary sector providers, and tender for the new contracts</li> <li>• Secure the advocacy Quality Performance Mark</li> </ul>
<b>Support and develop our paid staff and volunteers</b>	<ul style="list-style-type: none"> <li>• Develop an expanded training and development programme for paid staff and volunteers</li> <li>• Strengthen our annual appraisal and personal development programme</li> <li>• Implement our new volunteering arrangements</li> <li>• Improve, where possible, the additional benefits we offer to paid staff</li> <li>• Continue to hold staff conferences twice a year</li> <li>• Participate in the national staff survey, and respond to its findings</li> </ul>
<b>Transform our premises</b>	<ul style="list-style-type: none"> <li>• Move into new premises</li> <li>• Subject to this, sell and exit premises that we no longer require</li> <li>• Improve our other premises</li> </ul>
<b>Develop new services and secure new funding</b>	<ul style="list-style-type: none"> <li>• Introduce our expanded advice in foodbanks service</li> <li>• Seek replacement funding for our improving financial confidence service</li> <li>• Strengthen services for asylum seekers and refugees</li> <li>• Tender for new consumer services contracts</li> <li>• Continue to seek new opportunities to provide advice in health and care settings, including via social prescribing</li> <li>• Consider other opportunities to tender for new services</li> </ul>
<b>Campaign for changes to public policy</b>	<ul style="list-style-type: none"> <li>• Continue to focus on the introduction of personal independence payment and highlight its consequences for ill and disabled people</li> <li>• Contribute to the review of Sheffield's local assistance scheme</li> <li>• Support, with evidence, the case for improved tribunal premises in Sheffield</li> <li>• Develop the use of our data to influence public policy, and demonstrate our worth</li> </ul>

## Supporting priorities

	What will we do?
<b>Performance improvement</b>	<ul style="list-style-type: none"> <li>• Further strengthen our performance improvement and management systems, both across the organisation and with individual staff and volunteers</li> <li>• Sustain the high levels of performance achieved in 2015/16</li> <li>• Strengthen Advice Line performance</li> </ul>
<b>Good governance</b>	<ul style="list-style-type: none"> <li>• Sustain the high quality leadership and oversight provided by our Board of Trustees</li> <li>• Appoint a new treasurer, and possibly other new trustees</li> <li>• Review the Board's two committees, and ensure that they support the Board's oversight of all our services</li> </ul>
<b>Effective quality assurance</b>	<ul style="list-style-type: none"> <li>• Sustain our participation in the Quality of Advice Assessment programme</li> <li>• Introduce an improved and more consistent approach to case checking and individual file reviews</li> <li>• Continue to respond positively to complaints</li> <li>• Participate in the national client survey, and respond to its findings</li> </ul>
<b>Robust financial management</b>	<ul style="list-style-type: none"> <li>• Sustain our much improved financial management and reporting</li> <li>• Bring forwards plans to reduce the planned 2016/17 deficit</li> <li>• Bring forward plans to manage and mitigate the risks associated with the possible loss of funding in 2017/18 and beyond</li> </ul>
<b>Better communication and engagement</b>	<ul style="list-style-type: none"> <li>• Adopt the new Citizens Advice brand</li> <li>• Launch our new website</li> <li>• Introduce better paper based information for clients</li> </ul>
<b>Effective communication and information systems</b>	<ul style="list-style-type: none"> <li>• Investigate and implement a voice over internet phone service for the whole organisation</li> <li>• Continue to replace and improve IT equipment</li> <li>• Review and rationalise all printing solutions</li> <li>• Prepare for the introduction of the replacement for Petra</li> </ul>
<b>Friends of Sheffield Citizens Advice</b>	<ul style="list-style-type: none"> <li>• Grow our number of "friends"</li> <li>• Issue three "friends" newsletters each year</li> <li>• Invite all our "friends" to our annual review</li> </ul>

## Service delivery 2016/17 to 2018/19

### Advice services

We have reset all advice service delivery targets for 2016/17, taking into account changes in commissioners' and funders' requirements. Where possible, we have indicated what we believe the targets will be for 2017/18 and 2018/19, although these are dependent on commissioners' and funders' requirements and are therefore subject to change.

We will monitor and manage performance against these targets.

Service	Indicator	Target (per year unless stated)		
		2016/17	2017/18	2018/19
Advice	Number of people helped	20,000	20,000	20,000
	Number of issues dealt with	50,000	50,000	50,000
	% of Advice Line calls dealt with	50%	50%	50%
	Opening hours (per week)	80	80	80
	Quality assessment KPI 1	Green	Green	Green
	Quality assessment KPI 2	Green	Green	Green
Debt advice project	Number of cases	4320	4320	4320
	Number of additional cases	564	564	564
Improving financial confidence –Brass Tactics	Number of people helped	900	n/a	n/a
Improving financial confidence –Vulnerable People	Number of people helped	400	n/a	n/a
Mental health service	Number of people helped	280	280	280
Cancer	Number of appointments per week	21	21	21
Children's cancer	Number of 4 hour sessions per week	1	1	1
Brain injuries	Number of 4 hour sessions per week	1	1	1
Spinal injuries	Number of 7 hour sessions per week	1	1	1
Motor neurone disease	Number of appointments per week	4	4	4
Ambition working	Case studies	10	tbc	tbc
Building successful families	Number of families helped	60	60	60
Energy Best Deal	Number of people helped	55 – in 6 months		
Enhanced health - Broomhall	Number of people helped	80	80	80
Advice in foodbanks	Number of people helped	800		
	People with a positive outcome	500		
Great places	Outreach sessions per week	2	2	2

Muslim elders	Number of people helped	24	tbc	tbc
Social landlords debt and benefits	Number of cases per year	160	tbc	tbc
Totley outreach	Outreach sessions	1 per week	tbc	tbc
Pension wise	Face to face guidance interviews	3300	tbc	tbc
Deaf peer mentoring project	Number of Deaf people reporting reduced debts	50	50	n/a
	Number of Deaf people demonstrating improved budgeting	20	40	n/a
	Number of Deaf people reporting greater self esteem and independence and ability to participate in their community	30	60	n/a
Housing legal advice	Income	£90,000	£90,000	£90,000
Employment legal advice				
Public law legal advice				
Upper tier tribunal				

## Advocacy services

We have reset all advocacy service delivery targets for 2016/17, taking into account changes in commissioners' and funders' requirements. We are assuming that the same targets will apply in 2017/18 and 2018/19, although as we know that the commissioners plan to re-commission most, and possible all, of these services for 1 April 2017 onwards, all these targets may change.

We will monitor and manage performance against these targets.

Service	Indicator	Target		
		2016/17	2017/18	2018/19
Independent mental health advocacy	Number of referrals accepted	150	150	150
	Number of hours delivered	3,113	3,113	3,113
	Response to referrals within 2 days/3 days	80% / 100%	80% / 100%	80% / 100%
	Action Plans agreed within 2 weeks	100%	100%	100%
	Clients not accepted and signposted to other organisation	100%	100%	100%
	After using an advocate, client satisfied with the support received	80%	80%	80%
	Clients are able to receive advocacy in their preferred language	100%	100%	100%

Independent mental capacity advocacy	Number of hours delivered	8,569	8,569	8,569
	Dept of Health submissions on work done	100%	100%	100%
	Feedback received from people instructing the service	100%	100%	100%
	Monitor number of reports completed	100%	100%	100%
	Provide sample reports	12	12	12
	Provide information on impact of work on client outcomes	On request	On request	On request
	Provide information on impact of work on MCA compliance by professionals	On request	On request	On request
	Provide quality training on the role	On request	On request	On request
	Respond within agreed timescales	100%	100%	100%
Deprivation of liberty service	Number of hours delivered	5,884	5,884	5,884
	Respond within agreed timescales	100%	100%	100%
Generic advocacy	Number of people helped	150	150	150
Child and adolescent mental health service at Becton (IMHA and generic advocacy)	Number of hours delivered	390	390	390
CCG Information Service	No targets set			
All advocacy services	Provide information on compliments and complaints	100%	100%	100%
	External Quality Mark (QPM)	To work towards or achieve	To work towards or achieve	To work towards or achieve
	Available Monday – Friday 9 – 5 pm except bank holidays	100%	100%	100%

## Paid staff and volunteers

We have reassessed our staffing requirement for 2016/17, taking account of planned service developments and changes, and our budget.

The revised establishment is:

<i>Paid staff posts</i>	<i>Establishment 1 April 2016 FTE</i>	<i>Vacancies 1 April 2016 FTE</i>
Senior managers including chief executive	4	
Service managers	2.8	
Service delivery supervisors	13.6	
Specialist advice consultants	2.1	
Advice workers	47.3	
Deaf peer project workers	0.9	
Pension Wise caseworkers	2	
Pension Wise agents	1	
Support service supervisors	2.9	
Specialist administrators	1	
Administrators	11.7	1
Mental health advocates	14.7	0.5
Cleaners	0.7	
<b>Total</b>	<b>104.7</b>	<b>1</b>

The number of senior managers will be reduced to 3 FTE from 1 July 2016.

The cost of the revised establishment is included in the budget.

We have introduced four volunteer roles, and aim to have the following number of volunteers in each role:

<i>Volunteer roles</i>	<i>Number of volunteers</i>
Adviser	145
Advice assistant	16
Receptionist	36
Advocate	4
<b>Total</b>	<b>201</b>

## Financial plan

We have significantly improved and strengthened our financial planning and management. We have analysed all income for 2016/17, along with expenditure requirements. We have identified the principal financial risks, and the steps we will take to mitigate these. Our detailed budget has been approved by our Board.

In summary, our budget is:

	£
<b>Income</b>	
Sheffield City Council – voluntary sector grant	876,000
Sheffield City Council and NHS Sheffield CCG – advocacy services	654,000
Citizens Advice – Money Advice Service Debt Advice Project	615,084
Big Lottery Fund – Improving Financial Confidence	406,405
Citizens Advice – Pension Wise	174,000
Big Lottery Fund and Sheffield City Council – Advice in Foodbanks	149,262
Legal Aid and legal earnings	90,000
Big Lottery Fund – Deaf Peer Mentoring Project	81,467
NHS Sheffield CCG – mental health advice service	77,500
Weston Park Cancer Information Centre	73,889
Other	226,676
<b>Total</b>	<b>3,424,283</b>
<b>Expenditure</b>	
Staff salaries, NI and pensions	3,039,634
Staff and volunteers	124,605
IT and office	297,623
Premises	177,497
Governance	5,317
Other	57,397
<b>Total</b>	<b>3,702,073</b>
<b>Surplus/deficit</b>	<b>(277,790)</b>

We will utilise unrestricted funds of £93k and restricted funds of £77k in 2016/17. Without further action our underlying funds would therefore be reduced by £108k. We will bring forward plans to improve this position.

Looking ahead, we face significant financial challenges. Our income from the Big Lottery Fund for our Financial Capability Service comes to an end on 31 January 2017, and at present we do not have new funding for this service. Sheffield City Council and other funders will continue to face significant financial pressure. Sheffield City Council is expected to re-commission advocacy services for 1 April 2017 onwards.

We will continue to search for new funding. We will bring forward plans to manage and mitigate the risks associated with our funding being reduced.



**Citizens Advice Sheffield is the trading name of Sheffield Citizens Advice and Law Centre.**

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