

**Hillingdon and Ealing Citizens Advice**

**Strategic Business Development  
Plan**

**2005 - 2008**



*Independent - Free – Confidential – Impartial*

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# Strategic Business and Development Plan 2005 – 2008

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## **1. Aims and Objectives – Statement of Purpose**

HECA shares the aims and objectives of the national CAB service, of which it is a member. These are that:

**The service aims to ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available to them, and;**

**The service aims to exercise a responsible influence on the development of social policy and services, both locally and nationally.**

The Hillingdon & Ealing Citizens Advice service specifically aims to serve the needs of people who live or work in the London Boroughs of Hillingdon and Ealing for reliable, high quality advice and information on their rights and responsibilities.

It is an independent charitable organisation, and works in partnership with other voluntary, statutory, and private agencies for the benefit of its clients.

HECA aims to provide free, confidential, independent and impartial advice to people regardless of their race, religion, age, gender, disability or sexuality.

HECA also intends to play its part in the implementation of the Five Year Strategic Plan of the National Association of Citizens Advice Bureaux (NACAB) and local Community Strategies, pursuing common Objectives:

- Improving access to services
- Continuing to provide a quality service
- Ensuring clients' interests are represented at all levels
- Raising the profile of HECA within the community
- Securing adequate funds and resources to achieve goals

## **1. Background**

The origins of the Hillingdon CAB Service lie in the West Drayton CAB, set up in 1941, making it one of the oldest CABs in the country. Its constitution and area of benefit has been updated at various times, most recently in 2003 to include the borough of Ealing within its remit.

Hillingdon and Ealing are vibrant outer west London boroughs, close to the UK's main international airport at Heathrow and in parts prosperous and suburban whilst other parts have many of the advantages and challenges commonly associated with inner city life in London.

The service has changed considerably in this time, expanding to meet the needs of an ever changing and ethnically diverse population. At the beginning of 2005 the service had 10 paid staff and 19 volunteers and, in addition to providing generalist advice at three main CAB offices offered a variety of specialised services for vulnerable groups in the community and people in debt.

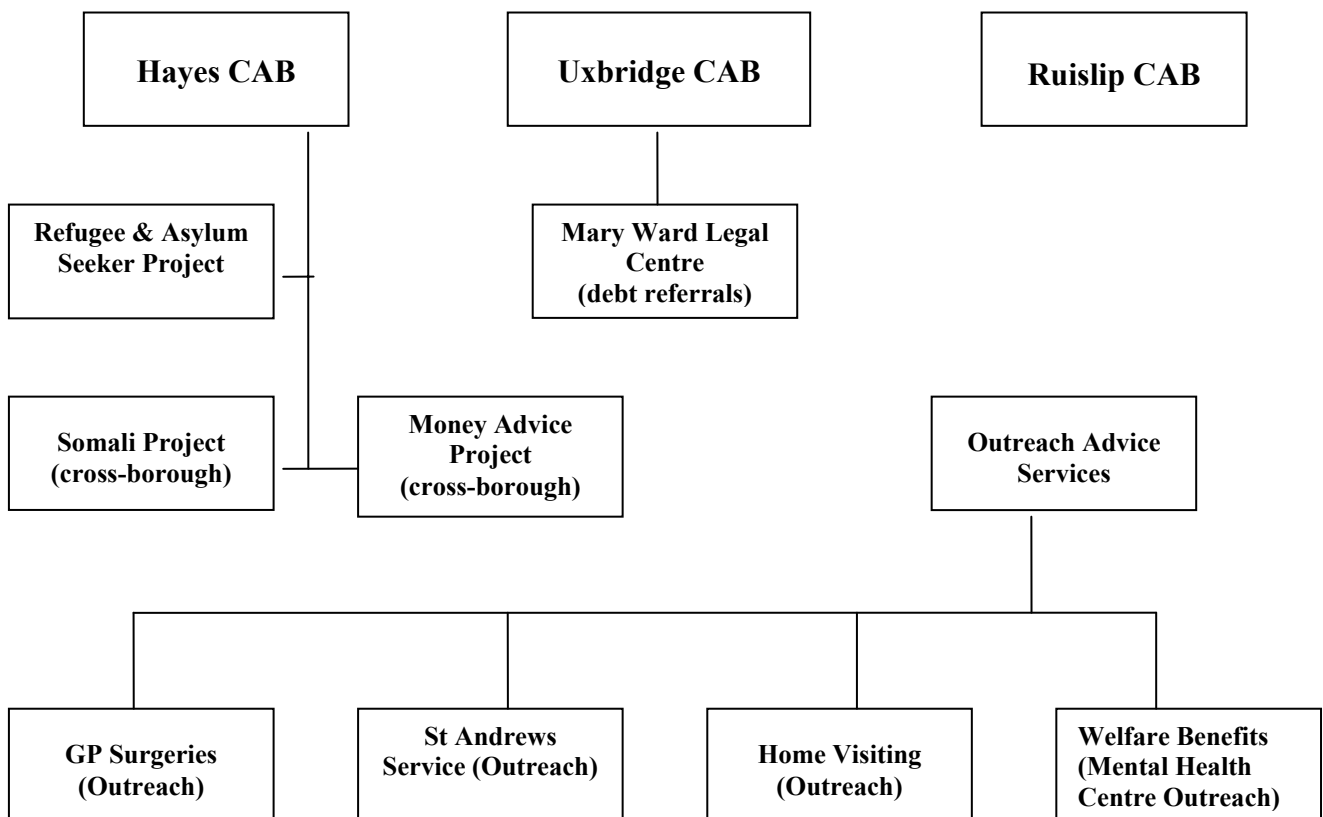
The bureaux play an important part in local community life and are recognised as having an essential role by partners in the voluntary and statutory sectors. As an organisation, HECA has a reputation not only for providing high quality advice to clients, but for contributing positively to the development of local and national services.

HECA is represented on the Hillingdon Consumer Support Network and has contributed to Community Legal Services (CLS) Partnerships and CLS and Local Authority consultations. Within the London CAB service, HECA is represented on the London Regional Committee, Directors Forum, Strategic Management Group and Health Advice Network.

The core funding for the main CAB service is provided by London Borough of Hillingdon, with additional funding from the Hillingdon Primary Care Trust for targeted projects and from the Association of Local Government for two cross-borough services to clients from Ealing, Hillingdon and Hounslow.

## 2. Description of Services at start of 2005

HECA's services at the start of 2005 consist of a core service provided from three bureaux in Hillingdon and seven projects as in the following chart:



### 3.1 The main CABx service

The three CABx are situated in ground floor premises with good visibility and access, provided by Hillingdon Council, in the Uxbridge Civic Centre, the Hayes One Stop and Ruislip (9 Eastcote Road). The Uxbridge and Hayes CABx are staffed five days a week and the smaller Ruislip CAB is open two days a week.

- ❑ Clients can receive personal advice by appointment throughout the week.
- ❑ A reception service, including 'drop in' advice, is provided on the mornings of Mondays (Hayes), Wednesdays (Uxbridge) and Thursdays (Ruislip). The reception service provides 'diagnostic' interviews, appointment booking, 'signposting' to other services where applicable and access to leaflets etc.
- ❑ Referrals are made to the specialist debt advice service run weekly by the Mary Ward Legal Centre at the Uxbridge CAB.
- ❑ Telephone advice is available on Tuesdays and Thursdays.
- ❑ Clients who write to the bureaux for advice receive a full written reply where advice by this method is appropriate.
- ❑ Referrals are made as appropriate to HECA's various bureau-based and outreach projects (see Appendix i, page 19 for details as at March 2005).

In the 12 months from January to December 2004 the service dealt with a total of 14,892 enquiries brought to it by 8,266 contacts with clients (see appendix ii).

### 3.2 Generalist and Specialist Services

Advice work within the CAB service is recorded at five levels as follows:

- Level 1 Signposting
- Level 2 Listening Ear
- Level 3 Advice and Information
- Level 4 Advice and Information, including casework
- Level 5 Representation work

To explain: 'signposting' means giving information on other services appropriate to the clients' needs; 'listening ear' records contacts that only involve listening to the clients' problems (not much used and due to be abolished); 'casework' means the adviser undertakes negotiations for the client; and Level 5 includes preparation for hearings as well as representation of the client at hearings.

The overall proportions for our service from January to December 2005 were as follows:

	Client Contacts
➤ Level 1 Signposting	6%
➤ Level 2 Listening Ear	2%
➤ Level 3 Advice and Information	52%
➤ Level 4 Advice including casework	38%
➤ Level 5 Representation work	2%

These results, particularly the percentage of cases requiring the adviser to take action on behalf of the client, give an indication of the neediness or vulnerability of the clients receiving the service and the amount of complex advice work being undertaken by a service. For most of our projects, Level 4 makes up 60-80% of their advice work. In contrast, telephone advice seldom involves casework.

### **What is a specialist service?**

Specialist advice services may be defined in three ways:

- Either the range of enquiries dealt with is limited, for example, to welfare benefits or debt advice;
- Or the service is targeted to a specific client group, for example, refugees and asylum seekers;
- Or the service provides advice at the level of a qualified specialist, usually involving representation of the clients at hearings.

For some years prior to the start of 2005 HECA has been successfully running specialist projects in addition to its generalist service at the bureaux, in the sense that the projects are either targeted at specific client groups (for example, the Home Visiting service) or the enquiries dealt with are limited to a particular area, for example, the Money Advice project that deals with debt enquiries.

However, as at the start of 2005, HECA is not funded to provide Level 5 specialist advice services in any of the enquiry areas. In real terms this means that whilst advisers may help clients prepare for hearings at benefit tribunals or the County Court (this made up 2% of our advice work – see above) we are not in a position to represent clients at these hearings.

This is an important limitation on our current service provision and a significant area for potential future development, as discussed further in Section 9 of this Business Development Plan.

### **3.3 Social Policy Activity**

A wide range of pressing social policy issues were brought to our advisers by the public in 2003/4 and in the course of our casework for clients we sent 273 Bureau Evidence Forms to Citizens Advice for input into national campaigning for improved policies and services.

In 2004 we arranged a number of meetings, for example with the Emergency Housing Unit and with a temporary housing provider and local MPs to discuss issues. Our evidence on the problems facing clients in Hillingdon and Ealing was included in a number of NACAB Evidence Reports to MPs and Government.

The ultimate aim of this work is to assist our clients and the public in general by putting right current problems and preventing future ones. In this way many more people are helped by the CAB service than visit their local bureaux for assistance on an individual basis.

We were also involved at a strategic level within London CABx in planning to further develop the effectiveness of social policy work within the region.

## 4. Client and Community Profiles

Our statistics show that in the calendar year from January to December 2005 we dealt with 14,892 enquiries in total brought to us in the course of 8,269 contacts with clients of our service. (See Appendix ii for full details).

### ➤ Gender and age

Sixty one percent of these clients were female and 74% were aged between 25 to 59. Seventeen percent were aged 60+ and 9% were under the age of 25.

The large majority of these clients would have been living in Hillingdon and so comparison is made with the statistics from the 2001 Census for the borough. This showed that 52% of the population was female, 18.2% were aged 60+ and 26.2% were aged under 20. The largest age group was 30-59 at 41.6%.

It is not possible to make a completely accurate comparison as our age ranges did not concur with the Census, for example, we monitor 25-34 year olds and the Census monitored 20 – 29 year olds etc.

Women access our service disproportionately to their numbers in the population and it is clear that the CAB service is not the advice provider of choice for the younger age groups (there are several agencies, such as the Young Peoples Advice Centre, specialising in meeting the needs of younger people).

### ➤ Ethnicity

Just 41% of our service users described themselves as 'White' whereas 52% belonged to Black and Minority Ethnic groups in the community, the largest being 'Black – African' at 19%. Our monitoring indicates that most of these were of Somali origins. The next largest group is described as 'other' at 10% and this category includes mainly mixed race and Afghan clients, a significant community in the Hayes area that makes use of our Refugee & Asylum Seeker Project.

Sixteen percent of clients belonged to local Asian communities, with 9% of all clients describing themselves as Indian, 3% as Pakistani, 3% as Bangladeshi and 0.7% as Chinese.

In addition to our African clients, 2.1% of our service users described themselves as Caribbean and 3.0% as being of 'other Black backgrounds'. This compared with figures for Hillingdon from the Census of 1.4% and 0.2% respectively.

In terms of ethnicity, the Census found that 79.1% of the borough's population was White, including 2.8% who were White Irish. The latter made up 3% of our service users. It also found that 2.3% described themselves as 'mixed', 1.9% as 'other Asian' and 0.2% as 'other Black', making a total of 4.4% compared with our figure for 'other' of 10%.

The Census also found that 9.6% of Hillingdon's' population described itself as Indian, 1.6% as Pakistani, 0.6% as Bangladeshi and 1.7% as Chinese. Therefore, it appears that the Indian and Chinese communities are using our service less than people of Bangladeshi and Pakistani origins.

However, the most striking statistic is the proportion of people from Black African origins using the service, being 19% compared with 1.7% in the borough of Hillingdon (and 3.7% in the borough of Ealing) in the 2001 Census figures. This no doubt reflects the success and impact of our Somali Advice Project as well as the high level of need for free and good quality advice, information and assistance in this relatively recently arrived community as it settles into the UK.

In general people from BME communities access our service in greater numbers to their proportion in the community. However, this may not be disproportionate to their level of need, which is a more complex matter to determine. NACAB commissioned a MORI poll in 2004 that produced many interesting findings in relation to the need for and awareness of the CAB service among BME groups.

In the Hayes CAB in particular over 30% of service users have been described (not very usefully) as 'other' for some time and our monitoring of BME service users will be improved from April 2005 onwards as the case management software CAB uses nationally is updated in line with current CRE categories. This will also enable more detailed monitoring of nationality and EU status.

### ➤ **Disability**

Since 2003 our service users have been asked whether they consider themselves to have a disability. Our records for January to December 2005 show that 34% answered 'yes'. We also dealt with 1,957 enquiries about disability and sickness benefits making up over 13% of all enquiries.

Figures from the 2001 Census for the borough of Hillingdon showed that 7.4% of respondents considered their health to be 'not good', 14.9% 'had a long-term illness' and 3.8% of respondents were 'permanently sick or disabled'. All three figures were significantly lower than for England and Wales as a whole.

These striking figures indicate that our service is succeeding in being accessible to people with disabilities. Our GP Outreach Project and Home Visiting services, funded by Hillingdon Primary Care Trust, together with our Telephone Advice Line service, are in part responsible for these results. However, relatively high proportions of people with disabilities also access the three bureaux in Hillingdon.

## **5. Quality of Service and Client Satisfaction**

As a member of NACAB our service undergoes a rigorous assessment and comprehensive audit every three years. Our most recent Quality of Advice Assessment, based on a representative sample of cases, took place in July 2004 and **gave HECA an outstanding score of 86%**, putting us in the top 5% of CAB services for the quality of our advice service.

In addition, HECA was awarded the Community Legal Service Quality Mark at General Help level in 2001 and has continued to hold the Quality Mark since then.

**Client Feedback surveys:** Feedback questionnaires, based on the Community Legal Service template, are available to all service users throughout the year in English, Somali, Farsi, Urdu, Hindi and Gujarati.

An active survey has been conducted between January to March for the last three years, including users of the bureaux, projects and Telephone Advice Line (see Appendix iii for results).

Results of the survey of 260 clients for the year ending 31<sup>st</sup> March 2005 showed that **86.9%** were 'very satisfied' with the overall level of service (compared with 80.5% the year before) and a further 10.4% were 'fairly satisfied'.

Ninety five percent reported that were likely or certain to recommend the service to someone else, compared with 90.6% in the previous year.

Supplementary questions asked for comments and suggestions on how we might improve, and what were the causes of dissatisfaction. Replies to these focused on having to turn up to make an appointment, the desire for 'same day' advice and longer appointments (most are booked for 45 minutes).

## **6. Review and Analysis of performance**

HECA held two business planning workshops in August and September 2004 in the Hillingdon Civic Centre. The delegates included bureau staff, volunteers, Management Committee members and representatives from NACAB and London Borough of Hillingdon.

The programme focused on identifying achievements and prospective challenges and opportunities, assessing the organisations' strengths and weaknesses and reaching a consensus on the priorities for future development of our services to form the basis of this Strategic Plan for 2005-2008.

These events were well received and feedback from participants indicated that the workshops had been productive and good for relationships between staff, volunteers and committee members.

Appendix iv includes the notes of these workshops, the participants, and the 'SWOT Analysis' (Strengths, Weaknesses, Opportunities and Threats); the results of the brainstorming sessions covering recent achievements, threats and opportunities, and the challenge of developing greater access to our services.

## **7. Community Advice Needs Analysis - Hillingdon**

Our monitoring of the 14,892 enquiries we dealt with between January to December 2004 (Appendix ii) show that 44% related to welfare benefits, 19% to consumer matters (mainly consumer debt), 12% to housing, 4% to employment and nearly 4% to immigration and nationality.

### **➤ Need for Generalist Advice**

The Hillingdon Community Legal Services Partnership (HCLSP) has not been active in 2004 to conduct its own research, however, our own experience indicates that there is considerable unmet need for free generalist advice in all enquiry areas. Our reception desks at the Uxbridge, Hayes and Ruislip Bureaux,

regularly turn away the same number of people as they are able to book in for appointments, indicating crudely that 50% of need in the borough is unmet.

Records of calls to our Telephone Advice Line (which provides access to an automated 24-hour information service) also indicate that many more people are trying to access advice than our current resources can meet.

### ➤ **Need for Housing Advice**

***Housing issues made up the second largest enquiry area*** (after welfare benefits) at 12.5% of the total in January to December 2005. The need to provide more housing advice is felt particularly acutely at the Uxbridge CAB, based as it is in the Civic Centre where people with housing problems and actual or threatened homelessness arrive throughout the week in various states of distress.

The Somali and Refugee & Asylum Seeker Projects in the Hayes CAB also deal with substantial numbers of clients in inadequate or insecure accommodation, including young vulnerable single people whose needs are deemed not to be a priority in the statutory sense.

For several years the Uxbridge CAB has provided information, and where possible, emergency appointments to 'non-priority single homeless' people. This assistance has mostly been provided by volunteer advisers, when available.

Several discussions were held in the course of 2004 with the Housing Department on the need to have a dedicated member of staff in the Uxbridge CAB to ensure access to an adequate and responsive service throughout the course of the week

### ➤ **Need for Targeted Advice Services to BME Communities**

The high degree of success of our Somali and Refugee & Asylum Seeker projects in attracting service users from these disadvantaged groups suggests that there may be a similar level of need for advice and assistance in other BME groups, over and above their proportions in the general population of each borough.

Demand for the services of both projects is above what can be met and provides evidence of the need for at least two more Somali-speaking advisers and for Farsi/Pushto-Speaking Advisers for the growing Afghan community in Hillingdon.

In addition to the need for advice in Urdu, Punjabi and Hindi, particularly in the Hayes Bureau, a growing number of South Indian/Tamil-speaking clients indicates a need for more advisers speaking these particular languages.

There is some concern in the borough of Hillingdon that Asian elders, in particular, are not accessing the services they need. Certainly, they are under-represented among the users of our Home Visiting service and this, together with the under-use of our current services by the local Chinese community may also indicate a need for targeted outreach projects and publicity.

Given the proximity of our service to Heathrow Airport, there is external interest in the impact of European Union expansion and the potential influx of EU nationals who may have particular needs for advice and information in the course of settling

in the UK and finding work and accommodation. We cannot assess this at the time of producing this Plan but will have the means to monitor EU status from April 2005 onwards.

#### ➤ **Need for Specialist Level Debt and Welfare Benefits Advice**

Debt falls into 16% categories in the CAB monitoring system current at the time of writing this Plan and combined, debt enquiries made up 22.4% of all enquiries. This compares with 18.7% of all enquiries in the calendar year, 2003/4, when we handled debts amounting to over £2,000,000 in the borough of Hillingdon. Thus ***the national trend towards increasing need for debt advice is reflected in this 20% increase in our area.***

We are also particularly aware of the unmet need for specialist level advice (i.e. representation) in the areas of welfare benefits and debt. This is echoed in the need of smaller advice agencies in Hillingdon to refer clients on for representation and their concern about inability to do so.

As welfare benefits make up the biggest number of our enquiries, our own advisers are well aware that clients who are represented at benefit tribunals fare better than those who are not, and that they are assisting in lodging appeals that may not have been necessary if clients had been represented at their hearings.

Similarly, our Money Adviser cannot meet all the demand for debt advice in Hillingdon, let alone the borough of Ealing, and is not in a position to represent clients at the County Court hearings.

These needs in Hillingdon and its neighbouring boroughs have been recognised by the Legal Services Commission (LSC). This body is at the beginning of setting up a **West London Financial Inclusion Strategy** and we hope to become part of its Financial Inclusion Advice Network Board shortly to develop the strategy with respect to meeting these needs for welfare benefits and debt advice.

#### ➤ **Need for Specialist Level Employment Advice**

The LSC also recognised the need for specialist level advice in employment matters by funding the Heathrow Employment Advice Project (HEAP), to provide six employment specialists in six agencies to work with clients in the boroughs of Hounslow and Hillingdon. This project was initiated in 2003 and HECA was able to refer on many suitable clients for its specialist assistance.

However, a decision was taken in December 2004 to end the funding for HEAP and it will be wound up by March 2005. This will leave a serious gap in service provision at a time when employment legislation and case law is becoming ever more complex and the only solicitors' practice dealing with legally aided employment matters in Hillingdon, K. E. Davies, has also ceased to operate.

Statistics kept by HEAP in the two years of its operation indicated a considerable need for assistance with unfair dismissal cases, illegal withholding of wages and race discrimination claims. Our own experience has shown that few cases referred to the Free Representation Unit, for pro bono work, can be taken up.

## ➤ **Community Advice Needs - Ealing**

Advice service provision in Ealing is markedly different to that of Hillingdon, and of most other London boroughs in that it is the only such borough without a Citizens Advice Bureau within it.

However, Ealing has a large provider of specialist level advice services in Law for All, and this has a smaller generalist advice component accessible at various outlets across the borough generating referrals to its specialist advisers.

Ealing also has a larger number of small community organisations providing advice to targeted parts of the community e.g. young Asian women, Afghan refugees etc. and an Ealing Advice Forum that enables networking amongst these groups. AdviceUK has been working with some of these smaller advice providers to help them attain the Community Legal Service Quality Mark.

Our own experience is that, despite the welcome diversity of advice providers, the unmet demand for a free, comprehensive advice service is even higher in Ealing than in Hillingdon, particularly in the more deprived areas of the borough where the proportion of BME communities, including those recently arrived, is highest.

Significant numbers of people in the borough of Ealing have been trying to access the advice services in neighbouring boroughs for many years, resulting in many of those services having to introduce restrictions limiting their clients to those from their own borough/catchment area.

HECA currently receives two grants from the Association of Local Government to provide a Somali-language advice service and a Money Advice service (dealing with debt) on a 'cross-borough' basis. These grants part-fund one full-time adviser for each project and both projects can attract sufficient numbers of clients with little need for publicity.

## 8. The Next Three Years – Future Plans for 2005-2008

### ➤ Access and Equality

Improving access to the CAB services throughout England and Wales and promoting equality/social inclusion are the major priorities set by our National Association for the next five years.

We expect to integrate these priorities into all aspects of our planning and service provision and to keep the operational aspects of our service delivery arrangements and publicity under constant review in terms of how they promote these objectives.

At the start of 2005 a Team Leader has taken on lead responsibility for promoting equitable access to our services and the development of new and improved services for disadvantaged groups that appear to under-use the service in proportion to their need for it.

The composition of our Management Committee, staff group, volunteers and service users are all regularly reviewed (see Appendix v). The introduction of an updated statistical recording system within CASE in April 2005 will enable us to gain more accurate and useful information on service users and the Team Leader will be able to monitor any emerging and significant trends.

### ➤ Core service delivery

The core service delivered from the three bureaux in Hillingdon is co-ordinated by three Team Leaders and mainly delivered by part-time volunteer advisers, of which there were 10 at the start of 2005, with the assistance of several trained form fillers and three 'paid days' of an Advice Worker per week.

This is substantially below the maximum capacity of the three CABx which could deploy up to 24 volunteer advisers and 12 trainee advisers if sufficient senior staff were available to meet their ongoing support and training needs.

It was universally agreed at the Business Planning Workshops in 2004 that there is **an acute need to increase staffing at the level of Advice Session Supervisor in all three bureaux** and to introduce a dedicated Guidance Tutor post to recruit and train additional volunteer advisers, providing them with the necessary support to complete the Certificate in Generalist Advice Work as required by NACAB.

The equivalent of just two full-time paid Advice Workers, working across the three bureaux, would also make a big difference to the number of enquiries that can be dealt with, should funding become available.

Plans to develop the core service in 2005-8 depend on significant amounts of additional funding becoming available for this purpose. The service would like to provide:

- Additional appointments at all three bureaux
- Additional hours of telephone advice
- A new email advice service

## ➤ **Project development**

At the start of 2005 two six-month pilot projects had started up, specifically aimed at meeting the advice needs of clients with mental health issues and those with problems of drug or alcohol addiction. It is hoped that both will prove successful in meeting their aims and become ongoing areas of work.

Two more projects are under discussion, one an outreach project to be based at the Macmillan Centre at Mount Vernon Hospital and the other, a Housing Advice project based in the Uxbridge CAB to meet the needs identified in section 7.

The potential of local Housing Associations (of which there are three main providers common to both Hillingdon and Ealing) to fund a project delivering advice to support vulnerable people in their tenancies is also under consideration and will be taken forward in 2005-2006.

Three main areas of potential project development have been identified and Team Leaders took on lead responsibilities to work with the Director on them as follows from January 2005 onwards:

- Development of housing and money advice projects/services
- Development of projects/services for BME client groups
- Development of health-funded projects/services

HECA is aware of several opportunities to apply for funding of new services arising in 2006-7 and will be setting in place appropriate monitoring to provide evidence of need from April 2005 onwards.

## ➤ **Social policy development**

HECA expects to play a full role in the implementation of a more strategic approach to social policy work within the London area, with a West London Social Policy Working Group expected to be set up in the course of 2005.

A Team Leader has taken on lead responsibility for social policy work at the start of 2005 for the first time and has analysed the Bureau Evidence Forms contributed to NACAB for April – September 2004. The following six months to March 2005 will be analysed shortly and will inform our priorities in 2005.

HECA will be represented at the new West London Social Policy Working Group and the priorities identified there will be incorporated into our work.

We plan to build on our existing relationship with local MPs, Councillors and our MEP and survey them about the social policy information they would like to receive from us. If there is sufficient interest a local six-monthly briefing on our Social Policy work may be developed to highlight the issues affecting people in the locality.

Our projects will continue to report on the social policy issues facing their clients and we will arrange meetings to take forward these concerns locally where appropriate, as well as contributing evidence to the national picture.

Our pilot outreach project, providing advice in mental health centres, will be undertaking social policy work for the first time that specifically relates to the experiences of people with mild to severe mental illness. We are pleased to note that the funder of this service has expressed an interest in this part of the project's work and recognised it as part of its 'user empowerment' ethos.

HECA will participate in consultation exercises and local liaison meetings with the statutory sector and use its client evidence to highlight concerns and promote improved practices.

We also expect to contribute significantly to the development of services through partnership work with other agencies such as in the anticipated West London Regional Community Legal Services Partnership and the continuing Hillingdon Consumer Support network (HCSN).

### ➤ **Promoting the CAB service in the community**

It was agreed at the business planning workshops set up to develop this Plan that promoting our service, in its many aspects, was a relative weakness of HECA. Our press release on the outstanding result of our Quality of Advice Assessment to Councillors and the local Gazette in August 2004 was welcomed as a positive development on which the service should build.

Our Annual Report for 2003-4 made significant improvements in the quality of its presentation and the publicity for our outreach projects was being upgraded at the time of writing this Plan. In January 2005 a Team Leader with experience of promoting the work of the CAB within the Asian media and training from the NACAB media department took on lead responsibility for this area of work.

With the Director of the service, she will develop our first planned approach to promoting the service in the local media and to stakeholders, and reviewing and upgrading all leaflets and posters in use with the general public and targeted client groups. This work will take place in 2005 and set the pattern for promotion of the service in 2006-2008.

### ➤ **CAB service development in Ealing**

It is not thought likely that a full bureau service will be established in the borough in the next three years, due to the cost of premises and the fact that Ealing Council has a contract with Law for All for a small amount of generalist advice across the borough (amounting to £100k per annum).

However, HECA is interested in using the experience it has built up of running successful outreach advice services and targeted projects, for example, to patients at GP surgeries and mental health centres and to people with debt problems, and potentially working in partnership to provide additional services where these would be complementary to existing advice provision.

## 9. Resources Strategy

### 9.1 Funding and Reserves Policy

In 2004 the Management Committee of HECA took the decision, in the light of pressures on the core funding of the service, that all new activities, including future projects, should be fully funded. The organisation expects, therefore, to implement a policy of **'full costs recovery'** with respect to all new service developments in the period from 2005-2008.

The reserves HECA was holding at the end of 2003/4 were below three months operating costs and measures have been taken in the course of 2004/5 to improve this situation.

The reserve policy of the charity is to work towards holding **reserves that represent a minimum of three months expenditure of the organisation**. This policy will be reviewed on an annual basis in accordance with changed demands on the funds of the charity.

### 9.2 Fundraising Strategy

Many of the service developments identified in this Plan as desirable to meet the advice needs of the community will require additional funds. Whilst the Director of HECA will take the lead role in fundraising, all staff and Management Committee members are expected to play an active part as and when required in securing resources for the service.

The Director of HECA initiated an Outer West London CAB Partnership with the Directors of the neighbouring Harrow and Hounslow CAB services in September 2004 to exploit opportunities at the regional level to gain funds for priorities that the services have in common, such as developing the core services.

The Partnership plans to commission some research into funding opportunities in the early months of 2005/6 to inform its strategic direction and enable priorities for joint fundraising applications to be identified.

The need for the expansion of CAB service provision in the borough of Ealing will be taken into account in seeking funding on a regional basis.

At the time of writing this Plan the Sub-Committee structure of the Management Committee is also under review and consideration is being given to setting up a Fundraising and Public Relations working group within HECA.

At the start of 2005 the service is dependent on three main sources of funding from the statutory sector. Future fundraising will aim to diversify this funding base in order to minimise risk, and also to reduce the proportion of the core grant from the London Borough of Hillingdon from 52% of the total funds to under 50%.

### **9.3 Staff and Volunteer Recruitment and Training**

HECA fully recognises that people are essential to delivering its service and is committed to ensuring that it is operating with a full staffing complement. The following activities will therefore be ongoing throughout the life of the Plan:

- Recruitment and selection to fill vacant staff posts as they arise
- Volunteer advisers, form fillers, administrative staff, and receptionists will be recruited and trained as needs arise and resources allow
- All recruitment will be in accordance with NACAB requirements to ensure equality of opportunity and diversity throughout the organisation
- Annual Training Plans will continue to be produced for all staff and reviewed regularly. All staff and volunteers will receive annual appraisals.

### **9.4 Premises**

At the start of 2005 HECA is fortunate to have the use of four ground floor offices with good disabled access, in the north, south and centre of the borough of Hillingdon. Three are public access points and the fourth is our administrative Area Support Office (ASO), based in the recently refurbished Voluntary Sector Resource Centre at Key House.

Our accommodation has been provided to us by London Borough of Hillingdon without rental charge for many years. As a result, grants for our existing projects do not include an element for rent and funds are not available for this cost.

We were asked to give up half of our accommodation in the Uxbridge Civic Centre in June 2004. The Uxbridge CAB has become more crowded as a result, limiting its ability to expand the staff group, and the refurbishments promised by LBH had not materialised at the time of writing this report but are expected.

Other changes may occur in the period from 2005-2008. It is expected that the local authority staff based in the Hayes One Stop may move into a new library building in Hayes in 2006/7 and this will raise the question of the future of the One Stop building, in which the Hayes CAB has been based for more than five years.

LBH has committed itself to paying our accommodation costs at Key House (approx. £16K pa) for at least two years, as it was for its benefit that we gave up space in the Civic Centre. Changes may take place generally concerning the provision of 'free' accommodation as a result of pressure on the Local Authority to account differently in the future. It would require a major increase in our funding to enable us to pay market costs for our premises.

Our relationship with LBH is good and at the time of producing this Plan, a Service Level Agreement is being finalised between HECA and the Council linked to three year funding for the first time, with provision for an annual increase to at least cover inflation.

Any major risks to which HECA is exposed, such as potential loss of premises will be regularly reviewed by the Management Committee and, as necessary, appropriate action will be taken to mitigate such risks and to ensure that premises adequate for the needs of modern developing bureaux are retained.

## 9.5 Equipment and IT

A fleet of good quality personal computers is now essential to the operation of any CAB service as, over the last few years, electronic versions of the Information System for advisers, management information and case management have replaced 'paper systems'.

Fortunately, our National Association has provided substantial assistance in ensuring bureaux are adequately equipped for the introduction of CASE (its computerised case management system) and forthcoming e-government initiatives. We took delivery of 19 additional computers in 2004 and were able to introduce CASE successfully in January 2004.

***E-government initiatives are also expected to have an increasingly significant impact on CAB services in 2005 - 2008.*** The very successful pilot in 2004 of Information Kiosks in CAB waiting areas is an example of how user-friendly technology can improve public access to both the CAB Advice Guide and government websites. This is an IT development HECA is keen to introduce at the earliest opportunity as the Hayes and Uxbridge CABx provide ideal locations.

HECA will need to ensure that the following is addressed throughout the life of this Plan for 2005-2008:

- Funding for adequate IT renewal is included in all future funding applications
- Bureau insurance policies provide adequate cover for increased equipment
- User policies and procedures are in place to ensure correct use of equipment and software including internet and email.
- IT equipment and systems are protected by effective back-up and anti-virus procedures.
- Training needs analysis is undertaken to identify skills gaps and to assess competence in use of IT equipment.

## 10. Contingency Measures

HECA understands the importance of making reasonable provision for crises and emergencies. These could include acute staff shortages, major IT failure, loss of funding or use of premises etc.

The service has developed internal procedures to cover most events that may occur on a day to day basis. In the event of a major crisis / emergency it would be necessary for senior staff and Management Committee members to meet as a matter of urgency to make an assessment of the situation, cognisant of any legal responsibilities, and agree a planned way forward.

**Heather Brown**  
**Director – Hillingdon & Ealing Citizens Advice Ltd**  
**April 2005**

## 11. Appendices

## Appendix i) HECA's Bureau-based Projects

➤ **RASP:** A Refugee & Asylum Seeker Project (RASP) was established at the Hayes CAB in August 2000 with funding from the Hillingdon Primary Care Trust (HPCT). This provides personal appointments in the bureau 4-5 days a week, and emergency appointments for asylum seekers with urgent needs.

Managed by Team Leader, Sadia Butta, this project achieved record results in 2003-4. RASP advisers handled 1,901 enquiries from 1,081 contacts with local refugees and their casework brought in £235,008 in financial gains for some of the most vulnerable people in the community.

➤ **Somali Project:** A Somali Project was established in January 1996 to provide advice and information in the Somali language to the local community, currently estimated at 5,000 persons in the borough of Hillingdon and 7,000 in the borough of Ealing. In the period 2003-4 Somali-Speaking Advice Workers for the project dealt with 1,408 enquiries made by 821 Somali client contacts.

The project is now funded by the ALG (to work with clients from Hillingdon and neighbouring boroughs) with additional funding from HPCT to make it full-time. A Trainee Adviser will shortly be providing appointments four days a week, with the possibility of working in a CAB in a neighbouring borough for 1-2 days a week.

➤ **Money Advice Project:** Our Money Advice Project was established in 1997 to focus on providing assistance to people in need of debt advice. Funded by ALG (to work with clients from Hillingdon and neighbouring boroughs) the Money Adviser dealt with debts amounting to £809,520 in 2003-4 and provided an outreach service in Acton and Southall. At the start of 2005 the project was based in the Hayes bureau and taking referrals from the Hounslow CAB service.

## The Outreach Advice Projects

➤ **Home Visiting Service:** Established in January 1996, this service provides in-depth advice, information and advocacy to clients who are housebound and generally unable to use existing advice services due to ill-health, disability or responsibilities as carers. In 2003-4 the Home Visiting Adviser, who is funded to work on the project 3 days a week, dealt with 535 enquiries from 283 clients.

➤ **GP Surgeries Outreach Project:** Established in December 1996, the project runs weekly advice sessions at Harefield Health Centre, Yiewsley Health Centre and The Belmont Medical Centre within the borough of Hillingdon. In 2003-4 our GP Outreach Adviser made 289 client contacts and dealt with 489 enquiries.

➤ **Welfare Benefits Advice Service:** A six-month pilot project, established in January 2005, delivers advice, information and casework to service users of four mental health centres in the borough of Hillingdon. A full-time adviser is running weekly advice sessions at the Belmont Centre, Mead House, Mill House and the Riverside Centre at Hillingdon Hospital.

➤ **St Andrews Outreach Service:** A six-month pilot project, also established in January 2005, delivers advice, information and casework to service users of the 'drop-in' at St Andrews Church for people with drug and alcohol addiction problems one afternoon per week.

## Appendix ii) Client Profile and Enquiries from Jan – Dec 2004

Profile Question	No. Contacts	%	Code Description
Gender	5,040	61%	Female
	3,229	39%	Male
	8,269	100%	
Age	105	1%	Age 15 or under
	51	1%	Age 16 - 17
	521	6%	Age 18 - 24
	1,585	19%	Age 25 - 34
	1,921	23%	Age 35 - 44
	2,024	24%	Age 45 - 59
	547	7%	Age 60 - 64
	633	8%	Age 65 - 74
	113	1%	Age 75 - 84
	19	0%	Age 85+
	734	9%	No answer / not known
	16	0%	Other
	8,269	100%	
Race	3,349	41%	White
	225	3%	White Irish
	174	2%	Black - Caribbean
	1,535	19%	Black - African
	254	3%	Black - Other
	711	9%	Indian
	235	3%	Pakistani
	232	3%	Bangladeshi
	61	1%	Chinese
	635	7%	No answer / not known
	858	10%	Other
		8,269	100%
Housing Tenure	1,823	22%	Council Rented
	1,286	16%	Private Rented
	1,037	13%	Housing Assoc/Charitable Trust
	1,993	24%	Owner Occupier, inc Long Lease
	739	9%	Staying with relatives/friends
	234	3%	Bed & Breakfast
	303	4%	Other temporary accommodation
	51	1%	Nowhere to stay
	684	8%	No answer / not known
	119	1%	Other
	8,269	100%	
Disability	2,780	34%	Yes
	3,640	44%	No
	1,849	22%	No answer / not known
	8,269	100%	

Issue	Description	Times Raised	%
B00	Benefit Debts: overpayments	117	0.79%
B01	Discrimination (in the admin)	6	0.04%
B02	Income Support	1,247	8.37%
B03	Housing Benefit	860	5.77%
B04	Pension Credit	288	1.93%
B05	Working/Child Tax Credit	518	3.48%
B06	Social Fund	280	1.88%
B07	Sickness Benefits	567	3.81%
B08	Disability Benefits	1,390	9.33%
B09	Unemployment Benefit	241	1.62%
B10	Retirement Pension	81	0.54%
B11	NI Contributions	24	0.16%
B12	Child Support	33	0.22%
B13	Council Tax Benefit	590	3.96%
B99	All other benefits	371	2.49%
	Sub-Total	6,613	44.41%
C00	Consumer debts	2,265	15.21%
C01	Discrimination (cons. affairs)	4	0.03%
C02	Goods and Services	370	2.48%
C03	Credit and finance	129	0.87%
C04	Insurance	86	0.58%
C99	Other consumer problems	36	0.24%
	Sub-Total	2,890	19.41%
E00	Employment debts	28	0.19%
E01	Discrimination (Employment)	36	0.24%
E02	Schemes/Training for unemployed	5	0.03%
E03	Self-employment/business	8	0.05%
E04	Terms and conditions of employ	198	1.33%
E05	Dismissal	139	0.93%
E06	Redundancy	64	0.43%
E99	Other employment problems	175	1.18%
	Sub-Total	653	4.38%
H00	Housing debts: mortgage & rent	483	3.24%
H01	Discrimination (in housing)	32	0.21%
H02	Actual homelessness	108	0.73%
H03	Threatened homelessness	413	2.77%
H04	Housing costs (excl. arrears)	130	0.87%
H05	Housing conditions	269	1.81%
H06	Environment & neighbour issues	70	0.47%
H07	Security of tenure	71	0.48%
H99	Other housing problems	280	1.88%
	Sub-Total	1,856	12.46%
L00	Legal debts	35	0.24%
L01	Discrimination (legal affairs)	5	0.03%
L02	Legal proceedings	492	3.30%
L03	Legal Aid	13	0.09%
L04	Compensation - accident/injury	76	0.51%
L99	Other legal problems	128	0.86%
	Sub-Total	749	5.03%

<b>Issue</b>	<b>Description</b>	<b>Times Raised</b>	<b>%</b>
R00	Relationship debts	11	0.07%
R01	Discrim. (in personal affairs)	5	0.03%
R02	Children	115	0.77%
R03	Separation	173	1.16%
R04	Death and bereavement	46	0.31%
R99	Other relationship problems	50	0.34%
	Sub-Total	400	2.69%
T00	Tax debts: all tax arrears	143	0.96%
T01	Discrimination (tax matters)	1	0.01%
T02	Income tax	31	0.21%
T03	Council Tax	156	1.05%
T04	Community Charge	-	0.00%
T99	Other taxes	13	0.09%
	Sub-Total	344	2.31%
U00	Utilities debts	252	1.69%
U01	Discrimination (in utilities)	3	0.02%
U02	Fuel Arrears	1	0.01%
U99	Other utilities problems	79	0.53%
	Sub-Total	335	2.25%
XC	Community Care	55	0.37%
XE	Education	64	0.43%
XH	Health	65	0.44%
XI	Immigration	352	2.36%
XM	Miscellaneous	242	1.63%
XN	Nationality	63	0.42%
XS	Signposting	211	1.42%
	Sub-Total	1,052	7.06%
	Grand Total	14,892	100.00%
	Raised by	8,266	

### **Appendix iii) Client Feedback Questionnaire results**

# Hillingdon and Ealing Citizens Advice

## Client Feedback Questionnaires



Year ending 31<sup>st</sup> March

No. of Questionnaires:

2005	2004	2003
260	156	268
%	%	%

<b>Q1.</b>	<b>How satisfied were you with our overall level of service?</b>			
	Very satisfied	86.87	80.13	80.52
	Fairly Satisfied	10.42	11.54	17.23
	Undecided	0.77	2.56	1.12
	Fairly dissatisfied	1.16	0.64	0.00
	Very dissatisfied	0.77	5.13	1.12
<b>Q1a.</b>	<b>If dissatisfied, please tell us briefly why this is.</b>			
	Responded	0.38	1.92	2.24
<b>Q2.</b>	<b>Did we give you information/advice that was easy to understand?</b>			
	Very easy	76.83	75.64	78.11
	Fairly easy	21.24	19.87	20.38
	Undecided	0.39	2.56	0.75
	Fairly difficult	1.54	0.00	0.75
	Very difficult	0.00	1.92	0.00
<b>Q2a.</b>	<b>How might we improve?</b>			
	Responded	1.92	4.49	4.48
<b>Q3.</b>	<b>How informative did you find our staff?</b>			
	Very good	91.09	89.10	85.39
	Fairly good	7.36	8.97	12.73
	Undecided	1.16	1.28	0.75
	Fairly poor	0.39	0.64	1.12
	Very poor	0.00	0.00	0.00
<b>Q4.</b>	<b>How well did we keep you up-to-date with progress?</b>			
	Very well	82.99	79.82	81.03
	Fairly well	13.40	14.91	16.09
	Undecided	3.61	4.39	2.30
	Fairly poor	0.00	0.00	0.00
	Very poor	0.00	0.88	0.57
<b>Q5.</b>	<b>How well did we listen to what you had to say?</b>			
	Very well	91.80	91.39	91.01
	Fairly well	7.81	6.62	8.24
	Undecided	0.39	0.00	0.37
	Fairly poor	0.00	1.99	0.37
	Very poor	0.00	0.00	0.00

<b>Hillingdon and Ealing Citizens Advice</b>		<b>2005</b>	<b>2004</b>	<b>2003</b>
No. of Questionnaires:		260	156	268
		%	%	%
<b>Q6.</b>	<b>Did we treat you fairly at all times?</b>			
	Yes	97.13	93.66	97.69
	No	1.23	2.11	0.77
	Don't know	1.64	4.23	1.54
<b>Q6a.</b>	<b>If you believe you were treated unfairly due to e.g. your ethnic background, sex, religion or any other reason please tell us briefly what happened.</b>			
	Responded	2.32	4.58	1.50
<b>Q7.</b>	<b>Would you recommend us to someone else if they needed legal help or advice?</b>			
	Certain to	86.07	79.58	78.43
	Likely to	9.02	11.27	19.22
	Undecided	2.87	4.93	1.57
	Unlikely to	1.23	2.11	0.78
	Certain not to	0.82	2.11	0.00
<b>Q7a.</b>	<b>Please give your reason(s) for your answer to Q7.</b>			
	Responded	25.00	32.05	28.95
<b>Q8.</b>	<b>Was the result of your case better, worse or the same as we had advised you?</b>			
	Better	72.31	77.89	70.48
	Same	26.67	21.05	28.31
	Worse	1.03	1.05	1.20
<b>Q9</b>	<b>Please tell us how you heard about our organisation and whether it was easy or difficult to make initial contact.</b>			
	Responded	51.92	56.13	55.60
<b>Q10.</b>	<b>Do you have any further comments or suggestions that may help us to improve our level of service? Please continue on another sheet if necessary.</b>			
	Responded	31.15	39.35	29.48
	<b>Name &amp; Address</b>			
	Responded	51.92	51.28	46.27

## Appendix iv) Notes of HECA Business Planning Workshops

### BUSINESS PLANNING WORKSHOP - Wednesday 11<sup>th</sup> August 2004 5.30 pm

Facilitator: Geoff Pope      Chair: Cheryl Evans

Participants: Heather Brown (Director), Nigel Cramb (LBH Chief Exec. Office), Eddie Thomas (Vice-Chair), Doug Bird (Treasurer), Pauline Crawley (Trustee), Shirley Lansiquot (Trustee), Derrick Ware (Volunteer Representative), Cllr George Cooper, Sadia Butta, Celeste Lovis and Ellie Lawrance (Team Leaders), Carole Pigeon (Admin Co-ordinator).

The purpose of the workshop was to produce strategic aims that can be developed after the meeting into the new business and development plan. The specific aims for the broad headings of the plan will be considered in the 7.00pm item.

CE 5.30 **Vision** for the HECA Service – ideas rather than a definitive statement. Looking beyond 1 year, at least 3 years ahead.

GP 5.40 Quick Summary of The **Citizens Advice 5 year plan** and what bureaux might do - Using a few overheads

NC 5.50 Hillingdon Council **Community Strategy**

HB 6.05 A few pointers from **HECA client and community profiles** – Include some ideas on Access Strategy

GP 6.15 Brainstorm a **SWOT** with flipchart (Could be in 1 or 2 groups)  
Strengths Weaknesses Opportunities Threats  
Consider political economic social and technological influences/opportunities.

6.55 Short Break

GP 7.00 – 7.55 pm Use all of the first contributions to describe what are HECA's **key strategic aims**.

Split into two groups with flipcharts. Each to identify 6 to 10 aims in total under the headings normally included in a 3 to 5 year business plan -  
Decide the end result, as well as the key activity and by whom.

1 Services and Customer Strategy

Clients, Availability and Access, Quality, Social Policy, Publicity, Equal Opportunities, Contingencies and Risk Management.

2 Organisational Development Strategy

HR – Staff and Volunteers, Trustee Board, IT, Premises, Finance and Funding,

Contingencies and Risk Management.

CE 7.55 – 8.00pm **Next Actions**

## **Vision for HECA - CE**

Proposed vision statement was read out - )  
Looking ahead 3 to 5 years we need to develop standards of achievement for the service.

We need to consider Funding – Client Needs – Access to the service – The Environment - Promotion of Volunteering.

Can we use our resources better?

We need to get our core structure right.

Our Business and Development plan must be a living plan.

## **Citizens Advice 5 Year Plan - GP**

The five main objectives in this plan provide a framework –

1 Meet the needs of as many people as possible (without compromising quality)

2 Have a greater influence on social policy

3 Innovate and develop new services

4 Improve Funding

5 Develop all of our people

Actions to meet the objectives include understanding clients needs, SP campaigning at regional and local level, ensure full cost recovery, help our funding partners achieve their goals, define career structure and skills and competencies for all roles.

## **London Borough of Hillingdon Viewpoint - NC**

A 3 year SLA will be introduced.

At present there is not a formal Council community strategy. The ruling Conservatives rely on Liberal Democrat support.

New Council in 2006 may have a more radical approach but it is not certain.

Key players in the Voluntary Sector, CAB, DASH, Age Concern, Law Centre, MIND, need to be looking at partnerships.

The CAB infrastructure needs to be properly in place and Council members do accept that core funding is needed.

There is big money in the CLS partnership.

The CLS debt strategy for West London will be an opportunity.

Acquiring the Specialist Quality Mark may be key

Set an optimum target for the number of volunteers

Where is your core business - does it cover all of the borough?

## **HECA Client and Community Profiles - HB**

HECA provides advice to significantly larger proportions of people with disabilities and to people from ethnic minorities than the 2001 Hillingdon census profile.

46% of the 17,000 problems dealt with are about welfare benefits and debt.

There is a need for a specialist debt worker

We need to look at access and appointments systems.

We need to explore Community Legal Services Opportunities - Victoria Pitt.

We must not dilute the quality of advice.

Discussions with funders such as PCT, ALG, Community Fund and also with Harrow and Hounslow CAB are in progress

## SWOT Analysis on 11<sup>th</sup> August 2004

HECA STRENGTHS	HECA WEAKNESSES
<p>Quality of Advice Wide spread of advice provided Dedication of staff/volunteer commitment Team-working</p>	<p>Supporting wide spread of services All things to all people Staffing level / workload Volunteer turnover Rewarding volunteers</p>
<p>Internal communications improving High client satisfaction High demand</p>	<p>Image perception (charity or statutory) Access to service</p>
<p>Facilities for people with a disability</p>	<p>Services for people with deafness</p>
<p>Relations with core funders – L.A. / PCT / ALG Project track record</p>	<p>Funding uncertainty Funding base reduced Promoting successes</p>
<p>Proactive Trustee Board</p>	<p>Developing new Trustees Trustee Board not operating as a full team</p>
<p>Premises</p>	<p>Physical separation over 4 sites</p>
<p>Social Policy evidence collection</p>	<p>Social Policy local campaigning Social Policy outcome awareness</p>
<p>Support from CitA New technology (CASE)</p>	
<p>Good records and statistics maintained.</p>	<p>Reports too wordy (HECA and CitA)</p>

## **BUSINESS PLANNING WORKSHOP - Wednesday 8<sup>th</sup> September 2004 5.30 pm**

**1. Present:** Heather Brown, Sadia Butta, Pauline Crawley, Cheryl Evans, Shirley Lansiquot, Ellie Lawrance, Viv Lefley, Sylvia Lo, Celeste Lovis, Geoff Pope, Derrick Ware.

**Apologies:** Doug Bird, Nigel Cramb, Maria Lee, Rajeev Mohindru, Carole Pidgeon.

Sylvia Lo, Citizens Advice London Region Business Support Co-ordinator, was welcomed to the meeting.

**2. Notes of meeting of 11 August 2004** were discussed.

### **3. Review of opportunities**

The opportunities identified in the SWOT analysis on 11 August were discussed.

#### **Access**

Telephone advice and email advice

Client needs analysis

Amend hours of personal advice

#### **Social Policy**

Participate in sub-regional social policy

#### **Publicity**

Training in PR

SB suggested CE contact the CitA media manager. Agreed SB to contact Hillingdon People about an "agony aunt" column and that SB become the HECA publicity contact.

#### **Equal Ops**

Geoff Pope suggested an Equal Opportunities Plan be separate from the main Business Plan. Some minorities in the borough e.g. young people were covered by Navigator. Sexual minorities were discussed. All premises have disabled access and had signage.

HECA would continue to employ bi-lingual and diverse staff who reflected the population mix. Type talk. Maintain and enhance existing provision for equal opportunities.

#### **Volunteers**

CL said she intended to advertise for volunteers in a different way in order to attract people with a long term commitment. The funding target was to recruit a three day week Volunteer Co-ordinator.

Flexible definition of two days a week discussed.

Approach retirement groups.

#### **Trustee Board**

CE aimed to review the Trustee Board structure by April 2005. Shirley Lansiquot felt there should be more working groups as the Trustee Board met infrequently. Viv Lefley said that formal Trustee Board meetings generated a heavy admin workload.

Review Trustee Board Structure  
Update Board Skills Audit  
Trustee Board development

### **Finance and Funding**

Priorities are:-

1. CLS franchises
2. Housing Associations
3. Big Lottery

Build up reserves and ensure full cost recovery for projects.  
Include costs for equalities improvements in funding bids.

### **Clients**

Forge partnerships with the following:-

- Department of Work and Pensions (DWP) (SAB?)
- National Homelessness Advice Service (NHAS) (EL)
- Community Legal Service Partnership (CLSP) (HB)
- Consumer Support Network (CL)
- Hillingdon Law Centre (SB)

**Purpose of Plan** is to find a way to work and to improve access.

**Risk management** – negotiate with LBH on the ratio between staff and premises.

### **4. Time scales**

**Agreed priorities as follows:-**

#### **Short term**

1. Review Trustee Board structure
2. Improve publicity
3. Restructure

#### **Medium term**

1. Quality of advice
2. Premises
3. Social Policy

Agreed to inform staff of discussions and present a Plan to the November Trustee Board meeting.

## Appendix v) Equalities Data on Staffing and Management Committee

The staff and Management Committee breakdowns below reflect the composition at 1<sup>st</sup> April 2005.

Ethnic Background	STAFF		Management Committee		VOLUNTEERS	
	No.	%	No.	%	No.	%
<b>White:</b>						
British	8	62	6	75	13	61.7
Irish						
Other					2	9.5
<b>Mixed:</b>						
White & Black Caribbean						
White & Black African						
White & Asian					1	4.8
Other mixed background						
<b>Asian or Asian British</b>						
Indian	2	15			1	4.8
Pakistani					1	4.8
Bangladeshi						
Other Asian background					1	4.8
<b>Black or Black British</b>						
Caribbean			1	12.5	1	4.8
African	2	15			1	4.8
Other Black background						
<b>Chinese or other ethnic group</b>						
Chinese	1	8	1	12.5		
Other background						
TOTAL	13	100	8	100	21	100
<b>Disability</b>	<b>STAFF</b>		<b>M/C</b>		<b>VOLUNTEERS</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Number of people with a disability	0	0	0	0	2	9.5
Number of women	12	92	4	50	13	62
Number of men	1	8	4	50	8	38

## Appendix vi) Organisational chart at start of 2005

# Hillingdon and Ealing Citizens Advice – Organisational Chart January 2005

