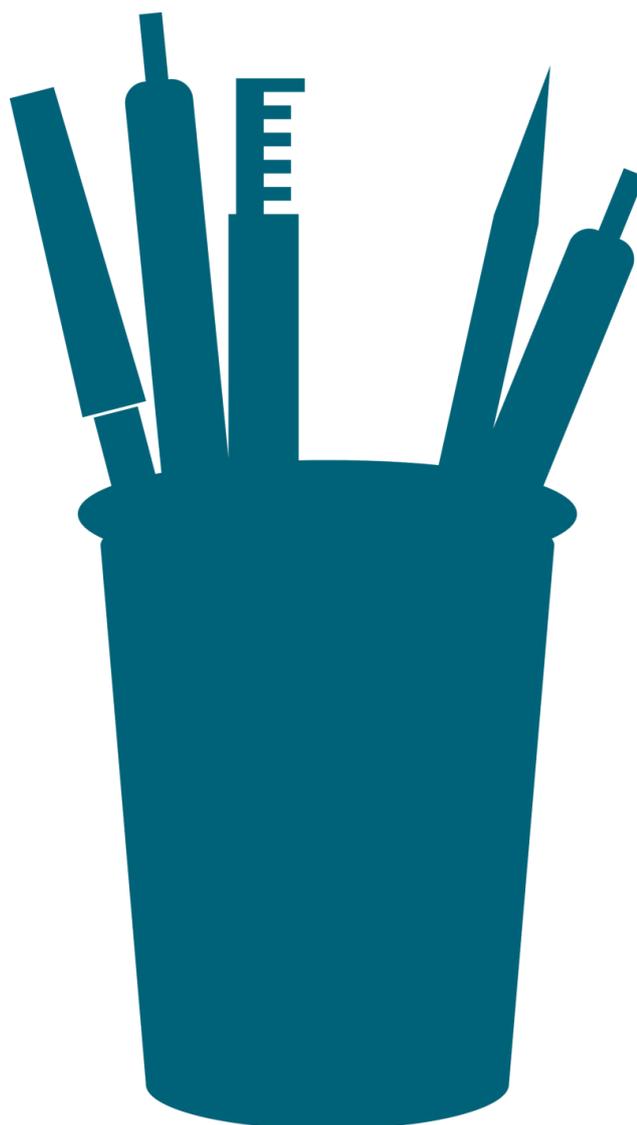


Citizens Advice Central & South Sussex research and campaigns development plan

2018 to 2019



Forward

About this plan:

This plan is designed to focus research and campaigns initiatives on the key issues and priorities of:

- Our clients
- CaSSCA's key stakeholders, including MPs, LAs and funders
- CA National team

The specific objectives focus on:

- Building our understanding of these issues,
- Delivering effective campaigns that seek to address them
- Communicating our work and successes with all stakeholders

Plan Scope: the scope of the plan is all research and campaigns activity across CaSSCA. Out of scope are detailed plans for specific campaigns, which are provided in 'project proposal forms'.

Plan Dependencies: in order meet the objectives of this plan, access to the following is necessary to ensure a clear line of sight between R&C plans and strategic priorities:

- CaSSCA business plan
- Stakeholder plans that have been made available to CaSSCA, including WSCC plan
- National team plans (available from Cablink/attending forums)

In addition, there is an interdependency between the R&C and Communications teams in the delivery of several of our objectives.

The role of research and campaigns

Research and campaigns play an integral role in the realisation of our vision and mission:

Vision

To be recognised above all, as an agent of social change, helping people take more control of their lives through accessible, responsive advice and **enriching society through powerful influence of social policy.**

Mission

To provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities. **For every voice to be heard and to improve the policies and practices that affect people's lives.**

Research and campaigns activities give CaSSCA the opportunity to widen our impact, allowing us to help those who may not be able to access our advice service and prevent issues from reoccurring; in effect, to be an agent of change.

Aims of our research and campaigns work

The following aims drive what we do and how we do it:

- ensure that our clients' voices are heard in the most effective way;
- incorporate CaSSCA's diversity and equality aims when choosing and planning projects;
- support Citizens Advice national campaigns – including contributing to national research projects via Calls for Evidence;
- include our centres in local research/campaign action based on client-related evidence; and
- foster partnerships with agencies and organisations who have similar aims.

As a service we have a significant amount of insight and data about the problems our clients and their wider communities face. Through research and campaigns, we use this insight to:

- help us research issues further
- influence decision makers to change policies and practices
- campaign to get decision makers to change policies and practices.

How we work

The Team: Research and campaigns team is a small team of volunteers – some of whom are also advisers – led by a volunteer Lead Coordinator. We have staff member (Service Delivery Manager) who acts as team leader, providing day to day guidance and support and who reports to the Client Services Manager.

Governance: Planning, top level management of projects and evaluation of outcomes is the function of the quarterly R&C Working Group, chaired by the Research and Campaigns Lead Coordinator. Members of this Group include the CEO, the team leader, the Lead Coordinator and R&C volunteers. In addition, a trustee, with a watching brief for R&C attends by invitation.

Our operational model

This is based on six key areas of focus:

- Running a Research & Campaigns team
- Evidence & Research
- Campaigns
- Involving clients and supporters
- Influencing and networking
- Communication

Appendix A details how we deliver against each of these areas, as well as the measures deployed to assess our performance.

Objectives for 2018-19

This development plan builds on our 2017/18 work and forms a key part of the CaSSCA business plan. In addition to the operational performance objectives detailed in Appendix A, the plan identifies specific objectives to be achieved during 2018/19, which relate to each our six priority areas:

Objective 1: Running a research and campaigns team

1.1 Establishment of a revised reporting system:

- A new consolidated quarterly research and campaigning report to be developed, to include BEF data, campaign updates and progress against plan.
- Key statistics specific to each office will be included in an appendix
- Report to be submitted to the CEO and SMT by 7/8th month following quarter end and will feed into reporting to the TB, funders and other key stakeholders.
- The report will be subject to review by the R & C Working Group
- Wider dissemination will be achieved through it's distribution to supervisors for onward briefings to employees and volunteers.
- A quarterly R&C Activity Report will be produced for internal and external audiences. (See Objective 6.1)
- New reporting to take effect from July 2018, reporting on Q1
- KPIs:
 - New report in place for Q1 report
 - Feedback from stakeholders

1.2 Resources in place to deliver R&C plan:

- A review of how the R&C function is resourced will be undertaken, with a view to establishing an optimal core team equipped to deliver the R&C development plan. The review will consist of:
 - Mapping of resources available within current R&C volunteer team, as well as within CaSSCA, against core activities and campaign plans.
 - Identification of additional requirements and if necessary, recruitment of new volunteers, working with Volunteer Support Team.
- KPIs:
 - Resource requirements identified and secured by end Q2
 - Adequate resourcing in place to deliver plan

Objective 2: Evidence and research

2.1 Improvement in quality and quantity of BEFs generated by advisers:

Communication will be undertaken across CaSSCA offices to promote greater participation of advisers in production of BEFs, through:

- Promotion of R&C to volunteers and staff, by:
 - Introduction of R&C Impact Report
 - Targeted messaging in weekly briefings
 - Training at team meetings
- Promotion of R&C via supervisors, by:
 - Provision of team meeting presentation on R&C for supervisor's use
 - R&C participation in regular supervisor forums
- KPIs:
 - Q1&2: Measure quality of BEFs and AIC coding – number of times missing information on BEFs (to create a baseline); Q3&4 start tracking vs baseline
 - Trend increase in number of:
 - BEFs,
 - BEFs in response to specific Calls for Evidence

2.2 Research plan established to support key stakeholder and funder engagement.

This will focus on researching key issues that are known to be of interest to our stakeholders, or which we believe will have relevance for them.

- See objective 5.1 regarding the identification of relevant issues to be researched
- Plan to be reviewed at R&CWG
- KPI: plan in place by end Q1

See Appendix B for research plan. Note: for completeness the plan includes CSR mapping project.

Objective 3: Campaigns: the objective is to have focussed, strategically aligned, portfolio of campaigns, which will be reviewed quarterly at R&CWG meetings.

Campaigns will be selected based on the following criteria:

- alignment with strategic priorities of CaSSCA and our key stakeholders
- reflecting local community needs and concerns, such that at least one campaign will have relevance for each of our LA catchment/MP constituencies
- where CaSSCA can optimise impact
- R&C project proposal forms will be signed off by CEO

The campaign plan will comprise of:

- Support for two national campaigns (planned to align with the R&C Calendar) – Scam Awareness & BESW
- Local campaigns based on BEF and other research evidence, and/or in response to partners and stakeholders; UC & Mental health
- ‘Reactive’ or unforeseen work at either a national or local level, so that we maintain flexibility to support urgent calls for evidence etc.

See Appendix B for campaign plan. Note: the plan is designed to be used as a rolling plan, that can be updated as campaigns progress through each phase, from scoping through to delivery.

KPIs for this section of the plan will be campaign-specific

Objective 4: involving clients and supporters

4.1 To generate client and supporter participation in research and campaigns activity:

- Working collaboratively with Communications team we will seek out opportunities to invite clients and supporters to participate in our work
- We will build on learnings from successful use of social media in earlier campaigns (eg: Access to banking) to generate participation
- KPI: numbers of clients responding to requests for participation

4.2 To gain an in-depth understanding of impact of UC on clients:

- Using learnings from PIP forum, we will run a forum with UC clients to obtain an in-depth understanding of practical issues encountered in UC application and claim management process
- Output from forum will feed into UC campaigning work with LAs, JCPs and will also feed into the national team

Objective 5: Influencing and networking

5.1 Establish stakeholder issues tracker to enable better targeting of campaigns:

- Identify key issues for MPs in CaSSCA area through website analysis and Hansard
- Expand tracker to other key stakeholders (to be agreed with SMT)
- Tracker to be used to inform targeting of campaign messaging
- KPIs:
 - Tracker in place by Q2
 - Response to communications/feedback

5.2 To maximise our ability to influence stakeholders, we will work collaboratively with ACCA where it will enable us to have a greater impact.

- Cluster Group will be the forum for agreeing where collaborative working should be adopted
- Campaigns identified in the plan include:
 - UC impact tracking (note: joint report planned for 12/18)
 - Scam Awareness: (note: joint event in 9/18 planned)
- KPIs: assessment of effectiveness to be undertaken by Cluster Group

Objective 6: Communication

6.1 Development of a quarterly R&C Activity Report, designed to build greater awareness of our research and campaigning work. To be produced by the communications team, with messaging input from R&C.

Report will be:

- Made available to all employees and volunteers
- Shared with relevant stakeholders
- Displayed in client waiting areas
- Initial impact report to be delivered mid-July, to coincide with first R&C quarterly report
- KPIs: feedback on activity report from audiences (via brief audience survey)

6.2 To generate timely, relevant content for our website, by:

- Working with communications team on agreed process for ensuring content is current and engaging
- Adapting national campaign material for our audiences
- Providing communications team with current campaign activity (including requests for participation) and campaign successes
- KPIs: website hits, audience feedback (as part of CaSSCA feedback process)

Appendix C provides a plan overview.