Our strategic objectives 2025-2027

Capacity

Create extra capacity to advise more clients by improving operational efficiency

- **Access to advice** – redefine the services we offer clients and extend opening hours
- **Responsiveness** – strengthen advice needs assessment to focus on identification of priority issues and the most suitable service for each client
- **Expand volunteering** – train 40 new advisers each year and improve retention rates with 65% of trainees graduating into service delivery
- **Effectiveness** – refine case closure activities, provide clients with information they can refer back to and reduce the number of clients re-presenting with issues we've advised on
- **Innovation** – adopt the use of technology (including AI) in administrative tasks to increase adviser capacity to help more clients

Complexity

Expand specialist advice so we can prevent people reaching crisis by addressing their debt, housing and other emergencies earlier

- **Expertise** – develop resources and training programmes to increase the number of advisers that can advise across multiple, inter-linked, issues (benefits, income maximization, housing, debt, family)
- **New approach** - pilot a debt on the day team to receive clients from across the organisation's services, deliver initial debt advice and prepare those clients moving into specialist casework
- **Early help** - develop and strengthen relationships with referral partners to improve the effectiveness of referrals and speed up response times for clients

Inclusion

Improve access to advice for those who find it hardest to get the help they need

- **Raising awareness** - train and support a network of Advice First Aiders who will assist members of their community with simple advice queries or access into our help
- **Pathways** – build routes into advice from within other groups where this will improve access to advice for their beneficiaries
- **Communications** - expand the use of text, webchat and WhatsApp to improve accessibility for clients without a smartphone or access to email
- **Support** - continue to provide staff with training that enhances their client work
- **Campaigning** – expand our research and campaigns work to raise awareness of the issues affecting people and make the case for change

Resilience

Future-proof our organisation, ensuring that our people and systems evolve and adapt in response to changing needs and new opportunities within the advice sector

- **Quality** – continue to drive up quality standards, client satisfaction, operational efficiency and impact measurement to ensure we're well placed to evidence performance and social value
- **Workforce development** - maintain an inclusive and supportive approach to ensure we continue to attract and retain a talented and diverse workforce
- **Income diversification** – pilot and launch a range of business-to-business services that offer other advice charities back office and specialist functions
- **Partnerships** - pursue partnership opportunities where these enhance our mission, help us to retain core business or secure new work
- **Cut costs** - review expenditure to identify opportunities to reduce overhead costs and maintain a competitive business model

citizens advice Somerset