

# Citizens Advice Bureau of Western Australia



## STRATEGIC PLAN

2020-2023

This Strategic Plan charts a course for the development and growth of CABWA over the next three years. It serves as a blueprint for CABWA's operations giving effect to its vision to be the place people go to when they need information in an accessible, confidential and non-judgmental manner to help them resolve their problems and to ensure its relevance to the community of Western Australia.

## Board of Management

The 2020/21 Board of Management is:

<b>Patron:</b>	The Hon. Len Roberts-Smith RFD QC	
<b>President:</b>	Barbara Kwiecien	
<b>Vice President:</b>	Margaret Dixon	
<b>Treasurer:</b>	Paul Setchell	
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## Confidentiality Clause

The information included in this Strategic Plan is strictly confidential and is supplied on the understanding that it will not be disclosed to third parties without the written consent of CABWA

## Recognition of Risk

The Strategic Plan represents our best estimate of the future of CABWA in the short to medium term. It should be recognised that not all major risks can be predicted or avoided, and few strategic plans are free of errors of omission or commission. Therefore, readers should be aware that this organisation has inherent risks that should be evaluated prior to any assessment as to its future performance.

## Copyright

This Strategic Plan has been prepared specifically for the Board of Management, Chief Executive Officer and members of CABWA. Neither the Plan nor its contents may be referred to or quoted in any statement, study, report, application, other agreement or document without the express approval of CABWA.

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# 1. Introduction

## 1.1 Background

Citizens Advice Bureau of Western Australia (CABWA) is an independent, not-for-profit organisation connecting people all over Western Australia with information and services so they can make independent and informed decisions. A range of information and referral, low-cost legal advice services and a mediation service is provided.

The first CAB was created in England in the 1930s in response to the prospect of world war. Volunteers dealt with problems ranging from the loss of ration books, homelessness and evacuation. They also helped locate missing relatives and prisoners of war.

CABWA was opened in 1963 and like its counterpart in England, focused on linking people in their respective communities with required information.

## 1.2 Strategic Plan Development

The development of this Strategic Plan commenced with a series of workshops with metropolitan and regional staff, volunteers, Board of Management and members from October to December 2019.

During these workshops attendees had a series of discussions around what they saw as CABWA's strengths, weaknesses, opportunities and threats, the political, economic, social and technological environment in which it operates, and around what they saw as its vision, purpose, values and actions needed to grow the organisation over the next three years.

Combined with a review of existing documentation, a review of the performance of CABWA and the external environment in which it operates this new Plan has been developed.

# 2. Strengths, Weaknesses, Opportunities and Threats (SWOT)

CABWA undertook a SWOT analysis to assist in identifying its current situation as an organisation. The SWOT analysis outlined in Appendix A has been used to assist in preparing the initiatives outlined in Appendix C.

The SWOT analysis was based on the following:

- Strengths - the characteristics of the organisation that give it an advantage;
- Weaknesses - the characteristics of the organisation that place it at a disadvantage;
- Opportunities – elements that the organisation could exploit to its advantage; and

- Threats - elements in the environment that could cause trouble for the organisation (considered further in the below-mentioned PEST analysis).

The activities of CABWA, like any organisation, are subject to threats which if not managed may impact on CABWA being able to achieve its vision. However, there are opportunities to which CABWA can benefit.

### **3. Political, Economic, Social and Technological Environment (PEST)**

CABWA undertook an analysis of the political (incorporating legal), economic, social and technological environment in which it operates to determine how these factors will affect the performance and activities of CABWA over the life of this Plan.

The PEST analysis in Appendix B has been undertaken as follows:

- Political – government regulations and legal factors have been assessed in terms of their ability to affect the political and legal framework in which CABWA operates;
- Economic – the economic environment was assessed to determine the issues that may have an impact on CABWA operations and service delivery.
- Social – An analysis of the socio-economic environment has been assessed to determine the impact of such things as demographics, cultural limitations, lifestyle attitude, and education have on the ability of CABWA to achieve its vision.
- Technological – An analysis of how technology can either positively or negatively impact CABWA’s activities were undertaken. These factors include technological advancements, lifecycle of technologies, the role of the Internet, and the spending on technology and training in the use of that technology by CABWA and education system.

The PEST analysis has been used to assess the external environment in which CABWA operates to determine the factors that are likely to impact on its ability to achieve its Vision over the next few years. It has been used to assist in preparing the objectives and initiatives outlined in Appendix C.

### **4. Vision**

CABWA’s vision is:

*“To be the first-place people go to when they need information in an accessible, confidential and non-judgmental manner to help them resolve their problems.”*

This vision has been developed from key themes that came out of the staff, volunteer, member and Board of Management workshops.

## 5. Purpose

CABWA's purpose is:

*“to connect people with information and services so they can make independent and informed decisions.”*

Client services is the core business of CABWA. In order to effectively do this CABWA needs to have a sustainable financial base, clearly defined systems and procedures and a well-structured organisational management framework.

## 6. Values

CABWA's Values are outlined below:

Value	Definition
Accessible	Regardless of their circumstances we will endeavour to <u>help</u> people.
Integrity	We will adhere to the highest standards of professional and ethical behaviour and value <u>transparency</u> and <u>honesty</u> in our communications, advice and actions.
Non-Judgemental	We will treat all clients with <u>compassion</u> , <u>tolerance</u> , <u>respect</u> and <u>dignity</u> .
Trust	Our clients can rely on confidential and accurate information and referrals provided within a <u>safe</u> environment through highly trained and knowledgeable advisors.

These values form the basis upon which CABWA's employees and volunteers will conduct themselves in achieving its Vision.

## 7. Stakeholders

The following have been identified as CABWA's stakeholders. These are the people and organisations CABWA will work with to assist it to fulfil its Vision.

Stakeholder	Basis of Relationship
Board of Management	The Board of Management is elected by the members and makes policy and strategy and represents the interests of members.
Clients	The clients are why we are here.

Department of Communities	The Department administers funding issued to CABWA.
Media organisations:	These organisations will report on the activity of the CABWA and can be used to assist in carrying our message and marketing.
Members of Parliament	The policy makers who have influence over funding, policy and legislation that impact CABWA operations. It is important to build a relationship with both government and opposition members. It is considered equally important to build a relationship with key staff in their offices who advise the Member.
CABWA Members	Members, through the Rules have power to elect the Board of Management and ultimately determine the strategic direction of the organisation.
Paid Staff	Employees, led by the Chief Executive Officer, advise the Board of Management and implement its decisions, manage the day-to-day activities of the organisation and provide advice and referral services to the public.
Referral Partners	Organisations that share a common client base and refer clients to CABWA or vice-versa as required (e.g. Community Legal Centres, Legal Aid, other NFPs.)
State Government	The policy and law maker whose decisions on funding, policy and legislation that impact CABWA operations.
Volunteers	Volunteers are engaged to provide various roles including information and referral services, mediation services and paralegal services. Some also act as Branch Coordinators.

## 8. Key Result Areas: Strategic Goals, Objectives and Initiatives

### 8.1 Overview

The *Balanced Score Card* approach has been adopted for the Strategic Plan, and focuses on the key result areas of:

- Customer/Client;
- Financial management;
- Internal management systems and processes; and
- Organisational learning and growth.

The purpose of this approach is to align CABWA's activities to vision, purpose, values and strategy, improve internal and external communications and monitor performance. By adopting this approach CABWA will:

- Increase its focus on strategy and results;
- Improve performance by measuring what matters;
- Align strategy with the day-to-day work of employees;
- Focus on the drivers of performance;
- Improve internal and external communication of the Vision and Strategy;

- Prioritise key initiatives or projects.

The result will be that the vision CABWA wishes to achieve and the actions it needs to undertake to achieve those goals will be outlined in such a way that is clearly defined and clearly measurable.

The performance measures are contained within each action plan so that the success of or progress in implementing the Plan can be determined. KPIs will be set annually and then measured and reported on in each annual report.

## **8.2 Key Result Area No.: 1 – Customer / Client**

This Key Result Area defines the value proposition that CABWA will use in order to satisfy existing clients and generate more clients. It focuses on the value that is delivered to the client (value proposition) which may involve time, quality, performance, information, referrals, service and cost and the outcomes that come as a result of this value proposition.

CABWA's goal in this regard is to provide client services in a manner that helps clients resolve their problems. This value proposition will be achieved by:

- Improving the accessibility of services;
- Adapting to client service needs;
- Continuing to provide a separate legal service; and
- Demonstrating the social contribution value to W.A.

Appendix C1 outlines the objectives and initiatives CABWA will implement.

## **8.3 Key Result Area No.: 2 - Financial Management**

This Key Result Area examines if CABWA's strategy will maintain a sustainable financial base upon which it can deliver its strategy.

CABWA's financial goal is to grow revenue to deliver the strategies identified in this strategic plan. This will be achieved by:

- Diversifying the revenue base;
- Having organisational consistency in financial management practices;
- Budget management being aligned to strategic objectives; and
- Scrutinising operational costs.

Appendix C2 outlines the objectives and initiatives CABWA will implement.

## **8.4 Key Result Area No.: 3 - Internal Management Systems and Processes**

This Key Result Area focuses on all the activities and key processes required for CABWA to excel at providing the value expected by its stakeholders. Particularly it

focuses on processes that relate to operational management, client services and establishing good relations with its stakeholders.

The CABWA's goal in this regard is to operate within and fully comply with clearly defined policies, procedures, legislative and governance frameworks. This will be achieved by:

- Aligning internal and external communication processes with the Strategic Plan;
- Managing organisational risk;
- Having an effective Governance framework;
- Having in place an internal and external audit process; and
- Having in place a comprehensive policy and procedure manual.

Appendix C3 outlines the objectives and initiatives CABWA will implement.

## **8.5 Key Result Area No.: 4 - Organisational Learning and Growth**

This Key Result Area focuses on the intangible assets of an organisation such as the skills and capabilities of the employees and volunteers that are required to support the value-creating internal processes. Particularly it focuses on human resources, information management and the organisational environment and quality of work-life. It is used to describe how the three components of people, technology and organisational environment combine to support strategy.

CABWA's goal is to have in place the right people, technology and organisational culture to effectively service clients. This will be achieved by:

- Aligning employees' job / tasks to organisational and Strategic Plan;
- The organisational structure being aligned to strategic plan;
- The Human resource management strategy meeting organisational and client needs;
- Staff and volunteers being provided with opportunities for professional learning.
- Branding conveying the correct CABWA message;
- Reviewing and updating the Strategic Plan; and
- Having an effective ICT framework.

Appendix C4 outlines the objectives and initiatives CABWA will implement.

## **9. Conclusion**

This Strategic Plan charts a course for the development and growth of CABWA over the next three years. It serves as a blueprint for CABWA's operations giving effect to its vision to be the place people go to when they need information in an accessible, confidential and non-judgmental manner to help them resolve their problems.

It is a practical and effective Plan designed to ensure all members, employees, volunteers, Board of Management and stakeholders understand CABWA's direction and their respective roles and responsibilities in achieving the vision.

The Board of Management is confident that the adoption of this Strategic Plan developed after considerable consultation will result in an organisation that is accessible, non-judgemental, a trusted source for information and one that operates with integrity.

## Appendix A – SWOT Analysis

	<b>POSITIVES</b>	<b>NEGATIVES</b>
	<b>Strengths</b>	<b>Weaknesses</b>
<b>Internal</b>	<ul style="list-style-type: none"> <li>• Volunteer Base – diversity, knowledge, vetting processes, rewards and recognition.</li> <li>• Collaboration / Relationships with others.</li> <li>• Strong reputation / brand.</li> <li>• Price competitive – low cost legal.</li> <li>• One-stop-shop – diverse information.</li> <li>• Branches accessible due to location (metro and regional), telephone, internet, social media.</li> <li>• Variety and flexibility of advice and services offered.</li> </ul>	<ul style="list-style-type: none"> <li>• Antiquated equipment – IT and telecommunications.</li> <li>• No long-term timeframe to make legal appointments – difficulty in making appointments.</li> <li>• Lack of clarity around roles and responsibilities of board members and volunteers.</li> <li>• Restrictive / centralised marketing – need to broaden the use social and traditional media.</li> <li>• Not all services are provided in the branch offices (e.g. mediation).</li> </ul>
	<b>Opportunities</b>	<b>Threats</b>
<b>External</b>	<ul style="list-style-type: none"> <li>• Broaden revenue base – review fee structure, identify new funding opportunities.</li> <li>• Become a Public Benevolent Organisation.</li> <li>• Increased promotion opportunities – libraries, events, seniors' expos.</li> <li>• Identify on-site IT and volunteer skills to assist other volunteers – skills matrix.</li> <li>• Flexibility of volunteer role and experience.</li> <li>• Networking beyond CABWA – collaborate with other organisations.</li> <li>• Expand legal services and identify new services.</li> </ul>	<ul style="list-style-type: none"> <li>• Limited and changing funding base (Government).</li> <li>• Current technology – advancing too quickly and lack of IT knowledge in the organisation.</li> <li>• Other organisation encroaching on services CABWA provides.</li> <li>• Gender / cultural mix of volunteers / staff – not being able to adequately reflect community mix.</li> <li>• Perception of organisation as a government agency or law firm.</li> <li>• Staff / volunteer turnover – loss of knowledge.</li> <li>• Operating expenses increasing – more funding spent on operational cost and not on services.</li> </ul>

## Appendix B – PEST Analysis

<b>Politics</b>	<b>Economy</b>
<ul style="list-style-type: none"> <li>• Changes in government funding to the organisation - cutbacks or stay as is – expenses growing.</li> <li>• Changes to government departments – impact service offering or referrals – being on-top of the changes.</li> <li>• Legislation changes – state / federal – impact on services offered Changes to reporting requirements of funding bodies.</li> </ul>	<ul style="list-style-type: none"> <li>• Unemployment – more people seeking advice and assistance – financial, tax, legal.</li> <li>• Cuts to other government or non-government services – increased need for referral services.</li> <li>• Economic situation – debt, loss of work, cost of living, marriage breakdown – increase client referrals and requests for financial assistance.</li> </ul>
<b>Social</b>	<b>Technology</b>
<ul style="list-style-type: none"> <li>• Diverse communities – ethnic background – new people different problems – lower socioeconomic issues.</li> <li>• Dealing with more angry clients – community is angrier / more emotional / mental health.</li> <li>• People falling within the funding gaps (i.e. legal aid).</li> <li>• Family court complexity and time consuming – impact on family’s emotional state.</li> </ul>	<ul style="list-style-type: none"> <li>• Accessible websites and information</li> <li>• Receiving more email requests rather than telephone or walk-ins.</li> <li>• Cost of technology – keeping up to date – increased training requirements.</li> </ul>

**Appendix C – Key Result Areas – Action Plans – For Management & Board Use Only**

For management & board use only.