

# **Citizens Advice in East Dorset & Purbeck**

## **Business Plan 2025-27**

### **Introduction by the Chair & CEO**

The past few years have presented significant challenges for the people we support. The rising cost of living and the continued impact of the COVID-19 pandemic have led to an increasing number of individuals struggling to make ends meet, with many relying on crisis support such as food bank vouchers. In these difficult times, the need for our services has never been greater, yet, paradoxically, providing effective support has never been more challenging. When people are living on empty, advice alone is not always enough. Some of our traditional tools are less effective, meaning that we must work harder and longer to achieve less.

Financial pressures further compound our ability to meet rising demand. Despite our best efforts, we are unable to reach as many people facing barriers and inequities as we should. However, Citizens Advice has a long history of resilience. We have continuously adapted to changes in society, the evolving needs of those we serve, and advancements in how we deliver advice. In light of current realities, we must adapt once again—without losing sight of what makes Citizens Advice unique, the effectiveness of our advice, and the significant impact of our work.

As we look ahead, we must shape our organisation to respond to growing demand and increasing disadvantage while managing limited resources.

#### **The Impact of Crisis**

As we enter 2025, we reflect on the last four years, which have fundamentally reshaped the way we operate. In response to these challenges, we have:

- Evolved our service model to place greater emphasis on remote service channels.
- Optimised the use of our premises, with a stronger focus on community outreach.
- Invested in and enhanced our use of technology to improve accessibility and efficiency.

We recognise that there is more to do to meet the growing demand for our services or to offset the funding constraints that we face. Our client data reflects the demographic makeup of East Dorset & Purbeck, but we acknowledge that we must do more to support those disproportionately affected. Marginalised groups—including disabled people, racially minoritised communities, rurally isolated people, and those receiving Universal Credit—face the most severe financial hardships. Without targeted action, these groups will continue to experience multiple disadvantages that hold them back further.

Alan Breakwell Chair of Trustees  
April 2025

Helen Goldsack CEO

# Our Purpose

As a network of charities, we are united by a common purpose: to shape a society where people face far fewer problems. Our mission is driven by three core principles:

- Empowering individuals by providing effective advice to help them solve their problems.
- Addressing the root causes of issues through advocacy and systemic change.
- Collaborating with governments and other organisations to create lasting improvements.

Citizens Advice in East Dorset & Purbeck is proud to be a member of the Citizens Advice network and aligns with its vision, mission, and values. In 2025, we fully embrace the Citizens Advice Transforming Together strategy and commit to:

- Providing advice fit for the future – Ensuring our advice services evolve with changing societal needs.
- Closing the gap – Reaching underserved communities and addressing inequalities in access to support.
- Taking early action – Identifying and addressing problems before they escalate.

Our organisational culture is central to how we provide our services, and we uphold the following fundamental principles:

- We work as one service with many leaders. As part of the Citizens Advice federated network, we share our expertise and collaborate across the organisation.
- We're led by people's needs. Understanding and responding to the needs of our clients, volunteers, and staff is a key strategic priority.
- We're rooted in the community. We actively engage with local partners and ensure our services are accessible to those who need them most.
- We're strengthened by volunteers. Volunteers are the backbone of our organisation, working alongside paid staff to deliver high-quality advice and support.
- We see the whole person. Our services take a holistic approach, and when we cannot meet all a client's needs, we collaborate with partners who can.
- We're trusted experts. We leverage our expertise to advocate for the people of East Dorset & Purbeck.
- We are good partners. Partnerships are a key strategic priority, ensuring we maximise our impact.

## Our Work in Practice

At our core, we provide free, independent, confidential, and impartial advice. Our service model is tailored to different needs and delivered in multiple settings to reach as many people as possible. Wherever appropriate, we empower clients to take action on their own behalf.

As a service and in collaboration with our partners, we:

- Deliver high-quality advice to help individuals find solutions to their challenges.
- Continuously evolve our services in response to emerging needs and societal changes.
- Leverage data insights to advocate for systemic improvements and develop innovative solutions.
- Work collectively to address complex challenges and create long-term positive change.

## Our Core Values

To guide our strategic plan, we have adopted three core values:

- We are people-focused. Everyone deserves the best service and support. We empower individuals—clients, volunteers, and staff—to reach their full potential.
- We are collaborative. We work closely with the Citizens Advice network, the Citizens Advice in Dorset (CAiD) consortium, and other partners to extend our reach and impact.
- We are innovative. We continuously adapt to changing needs and circumstances, testing new approaches locally and sharing insights with the wider network.

## Strategic Priorities (2025-2027)

1

**Accessible Advice** - Expanding access to advice services through multiple channels and outreach efforts. We will prioritise support for traditionally underrepresented and marginalised groups, as well as those in areas of deprivation. Our goal is to ensure that our services are inclusive, accessible, and effective for people at higher risk of disadvantage or harm, delivering positive client experiences and outcomes.

2

**People** - Investing in our staff and volunteers to enhance service quality and sustainability. We will support everyone within our organisation to develop and thrive, expand our volunteering model, and leverage technology to improve efficiency and service delivery.

3

**Partnership & Influence** - Strengthening collaborations to amplify our impact and advocate for systemic change. We will celebrate and build on our existing partnerships, recognising that working together provides the best opportunity to navigate funding challenges and enhance long-term stability.

4

**Sustainability** - Ensuring financial and operational resilience to support long-term service delivery. We will maintain robust financial procedures, consistently assess risk, and strategically invest in new and ongoing projects to sustain and grow our impact.

By focusing on these priorities, we aim to navigate challenges while continuing to deliver life-changing support to the people of East Dorset & Purbeck.

## Our Goals

1

**Recognised for Quality Advice** - We will maintain, develop, and promote our expertise in delivering high-quality advice across various settings and channels, including our specialist advice services. We will proactively seek opportunities for recognition and sustainable income linked to our expertise.

2

**Welcoming and Accessible Service Locations** - We will provide services from community-based locations that are easily accessible and foster partnerships and innovation in service delivery.

3

**Support for Rurally and Digitally Isolated Communities** - We will prioritise meeting the specific advice needs of those in rural or digitally excluded areas, recognising the compounded challenges caused by economic pressures, the pandemic, and the cost-of-living crisis.

4

**Partnership as a Core Approach** - We will continue to strengthen and celebrate our partnerships, working collaboratively across Dorset and within the advice and community sectors to create a people-focused approach and meet local needs.

5

**A Volunteer-Centric Organisation** - We recognise that volunteers are essential to meeting demand. We will invest in volunteer recruitment, training, and retention, create flexible roles, and build partnerships to expand and sustain volunteer involvement.

5

**High-Profile and Well-Understood Service** - We will invest in storytelling and profile-raising efforts to ensure our service is widely known, understood, and realistically positioned within public expectations.

6

**Innovative and Diverse Funding Portfolio** - We will cultivate a broad funding base, including grants, contracts, and donations from individuals, businesses, public services, and charitable trusts. Our aim is to establish long-term financial sustainability through diversified income streams.