

# A fair society for all, with lives well lived

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Our Vision and Strategy: 2023-2025



**citizens  
advice**

**Gateshead**



# CITIZENS ADVICE GATESHEAD

Citizens Advice Gateshead is an independent charity based in the North East of England, delivering free, impartial and confidential advice, information, guidance and support to people who live, work and study in Gateshead.

Our trading company, Society Matters cic delivers expert welfare training, social consultancy and direct access advice services across the country.

In 2022/23 Citizens Advice Gateshead **the charity supported 20,160 clients** - an increase of 4% on the previous year and the most people we have worked with in our history.

In the wake of the cost-of-living crisis, **the number of issues dealt with rose by 35% to 110,604**. This represents an increase from 4.4 issues per client to 5.7, reflecting the increased complexity of the cases we are working with.

As a result, financial outcomes for our clients have exploded, **rising by 67% to £11,983,885**, with an additional estimated £2.25m reduction in the burden on the state system.

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## A message from our Chief Executive

### Emerging from an unprecedented challenge ...

'Unprecedented' is a word used almost casually nowadays, but it is not an exaggeration to say that since the drafting of our previous Strategic Plan 2019-2022, Citizens Advice Gateshead, and its social enterprise, Society Matters cic, have weathered unprecedented challenges - to the charity, our staff and most importantly the people and communities that we serve.

We're proud that during the Covid-19 pandemic we had the capability to pivot our working practices from an office-based system to a home working network powered by state-of-the-art cloud computing and telephony solutions in a matter of weeks. Through inspiring leadership and great relationships with our suppliers and supporters, considerable teamwork and commitment from our staff and volunteers, and a manifestation of our values in practice, we stayed open every day of lockdown. The lessons learned from this have been embedded into the day-to-day operation of the charity which is now an agile, hybrid workplace, embracing new technology with softphones, SharePoint and collaborative online working accepted as standard practice. These developments have been recognized locally, regionally and nationally with awards for innovation, teamwork and the coveted North East Charity of the Year award.

### ...into a perfect storm of inequality

However, we have now seen the perfect storm with the emergence from the pandemic combining with over a decade of austerity, welfare reform, and deep cuts in Government spending, the ongoing impact of Brexit, a crisis in child poverty, a war in Europe causing chaos in the fuel markets, and political instability at home, to precipitate a cost-of-living crisis that few could have predicted. We have seen millions of people faced with the realities of poverty, which is no longer just about the unemployed, with more than half of our clients in paid employment yet still unable to make ends meet.



This is the reality of our current situation, and the backdrop to this strategic statement – a country facing years of economic challenges both as this crisis continues and then as we recover from the effects. And we're not at the peak of it yet. We anticipate that there are imminent issues in the housing market, with affordability, supply and quality of stock, and a debt crisis borne from the measures undertaken during the cost of living crisis. These will both become critical within the next year, bringing fresh challenge to the advice sector

## Our vision continues to drive us ...

This is why we must remain steadfast to deliver our vision of a fair society for all, with lives well lived because the people least resilient to crisis are the hardest hit by these financial pressures. We cannot afford to take a step back, we must stand firm and continue to find new ways to work, new ways to reach our clients, and double down on our research and campaigns work to influence those in power to recognise the desperate situation parts of our society are facing and address the pressures of poverty and deprivation.

## ... as we embrace innovation and change

In the face of these financial pressures and to ensure we are as accessible as possible to the people who need us, in Spring 2023 we will launch a pilot with extended opening hours, recognising that rising in-work poverty has seen people estranged from traditional advice services due to full-time work, rising economic pressure and stress. If these clients are unable to reach us for help in office hours, we have to change to reach them when they are available and that means being open for longer.

Geography is not the only limiting factor we are determined to challenge. We are finding new ways to work with communities of interest who may face marginalisation that divorces them from traditional advice delivery. Our advisers are placed within partner agencies within our communities providing advice at the point of demand, in a familiar setting to the client.







For example, we are working to include the Gypsy Roma community in our work, and we are engaging with families with children who are neurodivergent to deliver on their specific advice needs.

This work has led us to accelerate our equity, diversity, and inclusion activities, making stand against racism, in all its forms. This is an absolute commitment to the people we exist to support, our staff, volunteers, and partners, that if we truly believe in a fair society for all with lives well lived, we must ensure that we develop as an anti-racist organisation. The lessons we learn during this journey will inform our work against other forms of discrimination, oppression, and all forms of harassment by becoming not just an organisation that avoids racism, but is actively anti-racist

Our intention is to ensure our impact extends beyond Gateshead and with Society Matters, we are extending our mission to mobilise knowledge to a regional and national level. We're investing more time, effort and resource into the social enterprise, recognising the role of partnering with businesses in helping us to achieve our goals around the alleviation of poverty, particularly child poverty.

We are proud to be working with the North of Tyne Combined Authority to deliver a pillar of their Child Poverty Prevention Programme and we are determined that this work will be rolled out across the country, helping businesses throughout the UK to address the policies, processes and culture that is exacerbating in-work poverty. With an expanding direct access portfolio and a burgeoning training order book for social welfare learning, Society Matters cic is set to expand rapidly in the coming years.

### Working with our valued stakeholders ...

None of this is possible without our funders, supporters, staff, and volunteers, many of whom are themselves facing difficult times due to the cost-of-living crisis. We recognise this, and that our work is emotionally

challenging and requires great resilience from our staff so we are implementing measures to help where we can by investing in learning and development through better onboarding and training and access to apprenticeships, and better defining career paths so our staff can maximise their earning potential. We want our people to be the best they can be, so they can offer the best possible service to our clients and a big part of that is improving the environment within which they must work. We're transforming the Davidson Building into a more welcoming place to be, providing refreshments and breakfasts, and a dedicated quiet area to allow staff to decompress.

Linked to wellbeing, our participation in the Four Day Week trial shows our willingness to live up to our value of Blazing the Trail, putting Citizens Advice Gateshead at the forefront of an international move to challenge the assumptions around productivity and the way we work and live in the UK.

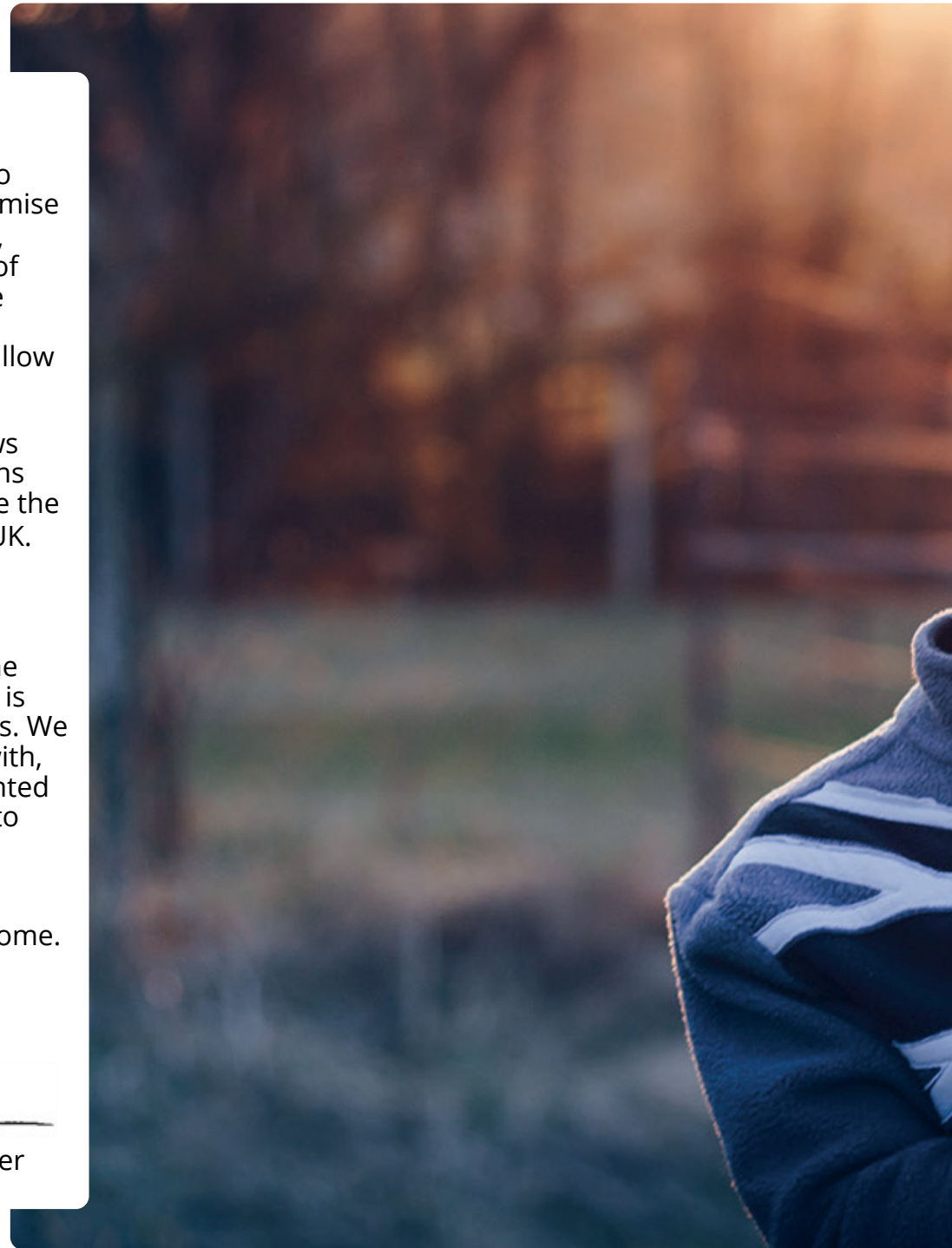
### **..we stand resolute and ready for the future.**

So, what about the future? Where will we be in three years' time? If the previous three years have taught us one thing, it is when all you can do is expect the unexpected, we need to be true to our values and our beliefs. We know that what we do makes a real difference to the people we work with, and we know as the world and times in which we live make unprecedented demands on us, we have the people, the talent and the determination to meet those demands head on.

So, watch this space – as our friends, supporters, funders, staff and volunteers stand beside us, we can say for sure that our best is yet to come.



Alison Dunn, Chief Executive Officer







## Our vision is a fair society for all, with lives well lived

'Our vision of a fair society for all with lives well lived is still far from being achieved , indeed the challenge we face has increased over the last three years due to Covid and the subsequent cost of living crisis, both of which have impacted disproportionately on the most vulnerable in our society. The demand for our services has never been greater and continues to rise.

Despite the enormity of the task ahead however we remain ambitious, undaunted and committed in our need to act in order to positively impact on the fact that inequality is increasing rather than diminishing and those born into poverty are likely to remain in poverty due to misguided values, policy and practice.

Many people's basic needs are lacking and self fulfilment is impossible. This will only change when our society supports and enables, rather than stigmatises and blames, and our Strategic Plan sets out how the Trustees of Citizens Advice Gateshead , its Chief Executive, staff and volunteers intend to focus their efforts to make a difference . Experience tells us that evolution rather than revolution is most likely to achieve a sustainable change and this is reflected in the fact we are building on the principles and intentions of the previous iteration of our Strategic Plan which remain relevant and enduring . A key exception to this is our renewed emphasis on Equality , Diversity and Inclusion.

We have always been clear that such is the enormity and complexity of the challenge we face that we can't possibly change things on our own so we remain committed to garnering the support of individuals and organisations, with shared values and beliefs, in order to extend support , share knowledge, inform and educate so we can all benefit from a fairer society where everyone has the opportunity to thrive.

Barry Taylor, Chair of Trustees







## Our mission is to mobilise knowledge so the system works, it works for everyone, and it powers the changes we need to be an equal and inclusive society

At Citizens Advice Gateshead and Society Matters cic, we believe that by mobilising knowledge that delivers tangible social value we can power change to move us closer to our vision for a fair society for all, with lives well lived.

Through our charitable activities and social purpose we will be working to mobilise knowledge across multiple spheres of influence to power the change needed to enable a fair society for all. This means that:

- people will be informed and empowered;
- people and organisations will change unfit systems, processes and practices;
- people will use their influence to power a change in attitude across society as a whole and, most importantly, to inspire action.

To enable this, we must enhance the work of people and agencies who partner with us, and be the professional partner of choice for people seeking expertise in our spheres of influence. We do this by:

- Utilising professional management and governance practices to drive the business forward
- Embrace innovation and technology to enable rapid and effective change in our services.
- Use data, drawn from across our services, to inform both incremental changes to our services, and larger service developments.
- Offer ourselves as a critical friend for those wishing to develop their strategy in these areas.

## Services for Society

We are also making our mark through our independent society enterprise Society Matters Community Interest Company.

We have a clear social purpose and a bold ambition to deliver innovative and vital services that will make an even bigger mark on society. Our aim is to bolster the work of the charity through mobilising knowledge in people and in the system across the North East region and nationally.

Our training offer continues to grow year-on-year, with a portfolio of courses designed to increase the support system's knowledge and understanding of the social welfare benefit system. Operating nationally, Society Matters is changing the way social welfare training is delivered, and we plan to continue expanding our portfolio of clients and courses over the next three years.

Our recent work with North of Tyne Combined Authority on their Child Poverty Prevention Programme and Multiply initiatives, has kickstarted our drive for social action and social advocacy work, and developed a model that we believe can be replicated for any local authority or employer who wants to tackle in-work poverty, beyond pay and benefits.

Society Matters is winning more contracts to deliver services to staff and clients across the country, both in terms of training and direct access. This is another growing income stream for the CIC and one we plan to develop further.

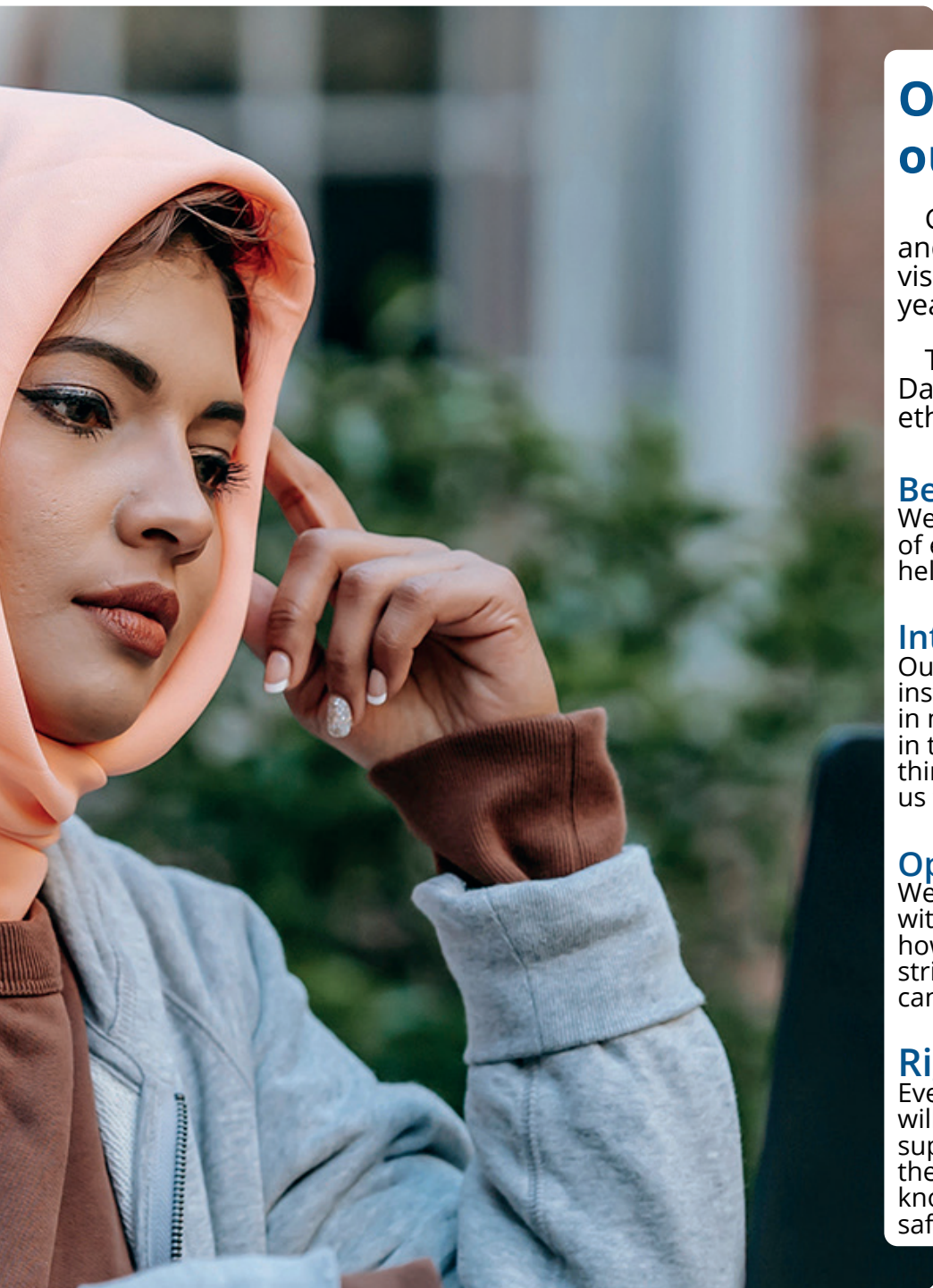
We're investing in staff and resources to build the capacity for growth and success, and to meet the growing demand for our work - the future is bright for Society Matters cic.



**societymatters**  
cic







## Our ethical principles are fundamental to our continued success

Grounded in our absolute commitment to the people we exist to support, and to the staff, volunteers and partners who are devoted to achieving our vision, we have defined three clear strategic priorities for the next three years.

The Charitable Ethical Principles published by NCVO in 2019, following Dame Mary Marsh's recommendations, have formed the basis of our own ethical principles as we believe they perfectly capture our standpoint

### Beneficiaries first

We work for the public benefit and put the interests of our beneficiaries at the heart of everything we do. We are driven to add value to society through our efforts, to help people, their families and whole communities.

### Integrity

Our staff, volunteers and trustees will always uphold the highest levels of institutional integrity and personal conduct. We take pride in doing things properly, in making a real difference. Of course we will sometimes get things wrong, but it is in these situations our integrity will shine through as we do our best to do the right thing, to put right our mistakes and to fully commit to those who put their trust in us to do what we do best.

### Openness

We are committed to being an organisation that has a willing and open dialogue with our donors, supporters and the general public, so they can see and understand how we work, deal with problems and spend our funds. Through continuing to strive for an increasing level of awareness and understanding within the charity we can deliver even greater transparency to those outside it.

### Right to be safe

Everyone who works with, or comes into contact with, Citizens Advice Gateshead will be treated with dignity and respect, and feel like they are in a safe and supportive environment. We have made a commitment to continually developing the knowledge and skills of our staff and volunteers, as well as the resources and knowledge they have at their disposal to heighten their ability to be safe, and offer safety to others.

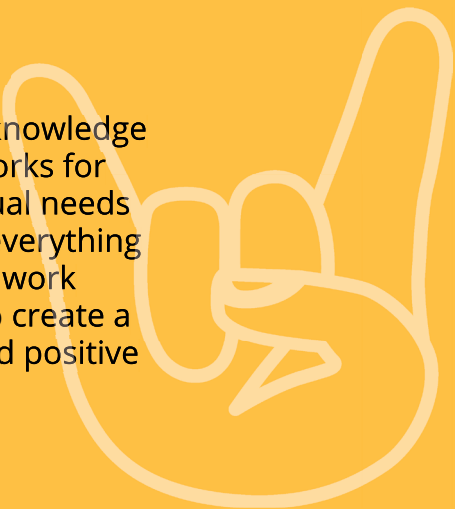




# Our core values are fundamental to the ethos of the charity, reflecting the attitudes and behaviours we encourage, expect and praise

## Rock the system

Our mission is to mobilise knowledge so the system works and it works for everyone. We put the individual needs of our clients at the heart of everything we do every day, and actively work individually and collectively to create a system that has a tangible and positive impact on people's lives.



## Stand Up, Speak Out

We acknowledge there are historic and systemic injustices in our society and believe we must stand up for a fair society for all, with lives well lived. We speak out against racism, discrimination, oppression and all forms of harassment as we strive to understand and value each other's culture, life experience, gender identity, disability, class and sexuality.



## Own it!

We strive every day to be the best that we can be, holding ourselves personally accountable, taking ownership of our actions, our achievements and our development. With our focus on efficiency and shrewd planning we take pride in making every pound count and securing the long-term health of the charity.



## Blaze the trail

We embrace a culture of change and innovation, constantly striving to develop new ways of working to better serve our clients and communities. We know that not everything will work first time, but we fail forward, trying new things and learning from the journey.



## Our priorities reflect our ambitions

Grounded in our absolute commitment to the people we exist to support, and to the staff, volunteers and partners who are devoted to achieving our vision, we have defined three clear strategic priorities for the next three years.

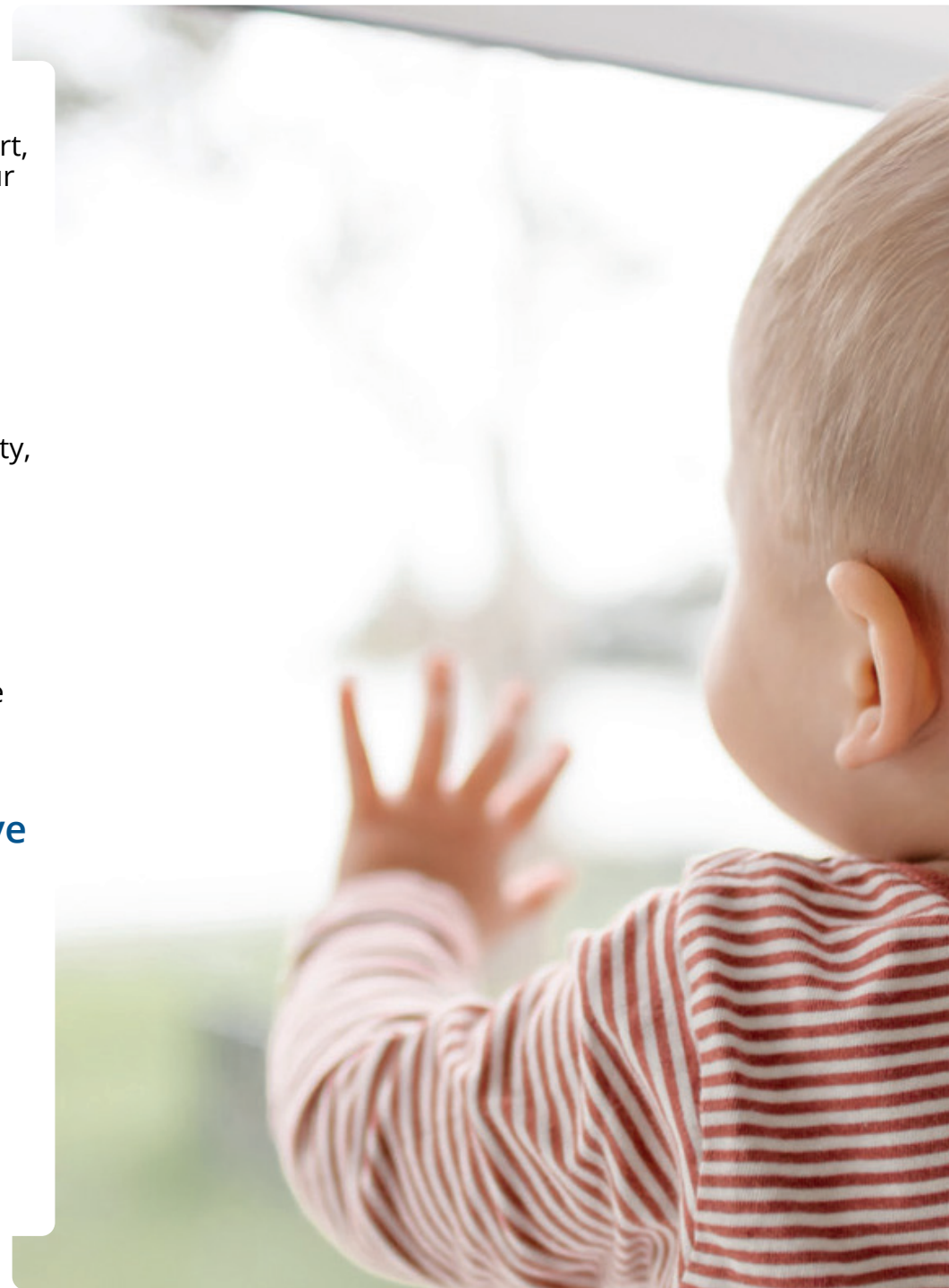
Building on our work from the previous period, and reinforcing our commitment to equity, diversity and inclusion, each of our strategic priorities has been expanded to include a specific equity, diversity and inclusion-focussed objective.

By doing this we are determined that our stated renewed focus on equity, diversity and inclusion and especially our determination to truly become an anti-racist organisation, will be reflected in every aspect of the work that we undertake and not be confined to one particular directorate, one workstream or one group of staff with a special responsibility.

It is the responsibility of everyone associated with charity to reflect our priorities, values, ethics and vision in every piece of the work we do. By placing equity, diversity and inclusion front and centre of our priorities, we emphasise its importance and our commitment.

### Help people to know and understand their social welfare rights and responsibilities so they can improve their quality of life.

- We will enable people to easily access the knowledge they need.
- We will shape our service around the needs of each person.
- We will deliver quality, impartial advice and information.
- We will know the true impact of our services on people's lives.
- We will shape and design our service so that it is fully accessible by those at a greater risk of harm, detriment, or discrimination because of their race, gender, disability, sexuality, age, belief, class or socio-economic circumstances.







## Progress to a system that supports and enables people to reach their full potential - that doesn't stigmatise, cause hardship or allow anyone to fall through the net.

- We will embed our voice across the wider system as an impartial and evidence-based commentator.
- We will shape and influence commissioned services until they meet people's needs.
- We will drive policy change to eradicate the root cause of poverty, disadvantage and inequality
- We will galvanise people, individually and collectively, to be a compelling force for change.
- We will give a voice for those groups with lived experience of harm, detriment, or discrimination, and challenge practices and policies which reinforce and reproduce those conditions.

## Be an enduring and dynamic charity that never stands still until we have a fair society for all, with lives well lived.

- We will become the charity of choice full of great people who are motivated to make difference.
- We will support and nurture people with the right values and the will to grow and evolve.
- We will drive income through innovation and creativity, and make every pound count
- We will be known as ethical and inspirational, and a leading light in the community and voluntary sector
- We will achieve greater diversity and create more inclusive opportunities at all levels and within every space in our charity.





## Our Strategic Model

Our work is driven by our vision and mission and they sit at the core of any project we undertake.

From this core, we derive three strategic priorities forming the main pillars of our strategy. These reflect not only our responsibility to provide quality independent advice, but also our wider aim to influence societal change.

These are influenced by our values; the day to day principles that all staff work to, and our wider ethical framework.

To create and maintain organisational momentum and focus, we use a flywheel concept - a cycle of business operations where success in one 'lever' drives forward the subsequent levers, creating the momentum required for progress. Focusing on operational efficiency in this business cycle, we will deliver best value for our funders, as well as the best advice for our clients.

Each lever is monitored using a 'golden KPI' providing a top level view of the organisational health of the measure, and several supplemental sub-KPIs

These in turn feed into our business plan and our monthly planning review cycle, as well as the service, project and departmental plans that inform the day-to-day delivery within the charity.

This structure provides a clear pathway from our vision, mission and values, to our day to day operations - a link that is easily communicated to staff and stakeholders alike.



## OUR VISION AND MISSION

'A fair society for all, with lives well lived'

'...to mobilise knowledge so the system works, it works for everyone, and it powers the changes we need to be an equal and inclusive society.'

## STRATEGIC PRIORITIES

Help people to know and understand their social welfare rights and responsibilities so they can improve their quality of life.

Progress to a system that supports and enables people to reach their full potential - that doesn't stigmatise, cause hardship or allow anyone to fall through the net.

Be an enduring and dynamic charity that never stands still until we have a fair society for all, with lives well lived.

## VALUES

Rock the System  
Blaze the Trail  
Own It!  
Stand up, Speak Out

## ETHICS

Beneficiaries first  
Integrity  
Openness  
Right to be safe

Improve financial  
and organisational  
health

Invest in growing  
and retaining  
talent

Deliver responsive  
quality advice  
services

## FLYWHEEL

Innovate service  
scope, efficiency  
and agility

Attract opportunity  
enabling  
investment

Evidence socio-  
economic  
impacts

## KPIs and OPERATIONAL PLANNING

Each section of the flywheel is measured against a suite of key performance indicators, fed with real time data. This, in turn, informs the formulation of execution of our operational planning on a directorate, service and project level

## Independent Endorsements

Our commitment to quality assurance and continual improvement is fundamental to our values. This is evidenced through our robust approach to delivering client services, as well as independent endorsement through quality standards and accreditations.

Quality assurance is embedded into all aspects of the charity, to maximise our effectiveness, our efficiency and the impact we have on our clients and other stakeholders.



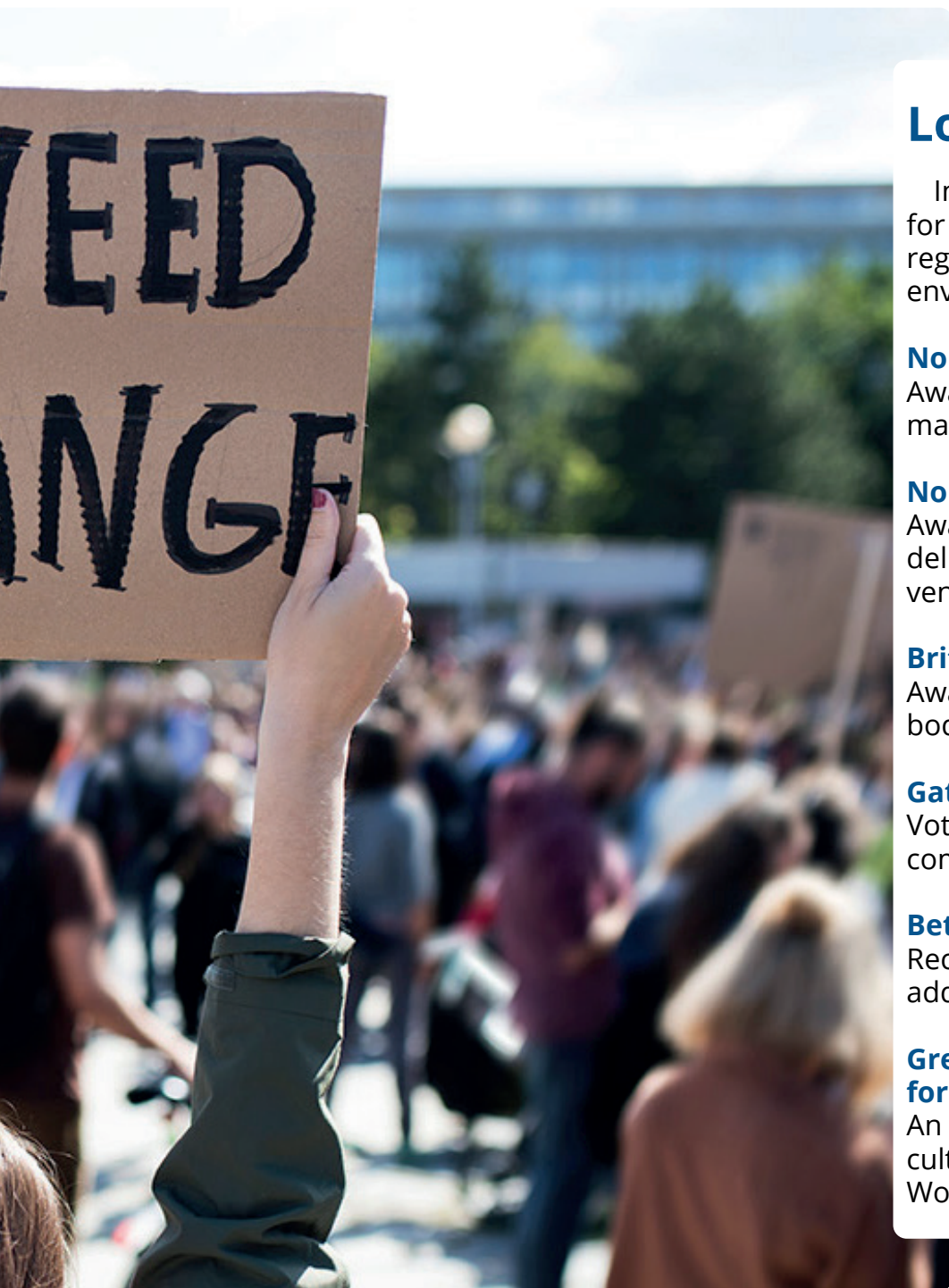
## Affiliated Member of Citizens Advice

At Citizens Advice Gateshead we highly value our long-established affiliated membership of the Citizens Advice network, as one of almost 300 independent charities across the UK. As a Citizens Advice member we research and campaign on behalf of our citizens, we contribute innovation and lead best practice across the network, and we draw on the extensive knowledge base and resources of the membership organisation.

We are proud to uphold the immense value of the Citizens Advice brand through our work, and are equally proud that whilst doing so we are ploughing our own furrow as a local charity with a national presence and an absolute commitment to delivering on our vision of a fair society for all, with lives well lived.







## Local, Regional and National Awards

In the past year, we have been recognised locally, regionally and nationally for our work during the Covid-19 pandemic, helping the people of the region tackle the cost of living crisis and provide a strong, healthy work environment for all of our staff and volunteers.

### **North East Charity of the Year 2022**

Awarded by The Journal, recognising CAG's work as exemplary amongst the many major charities in the region.

### **North East Chamber of Commerce Business Diversification Award**

Awarded for the work we have done post-Covid in changing our advice delivery model to embrace the needs of our clients – including our locality venue work!

### **British Chambers of Commerce North East Regional Problem Solver**

Award as a result of the Business Diversification Award by the countrywide body.

### **Gateshead Voluntary Organisation/Charity of the Year 2022**

Voted for by the public, recognising the charity's contribution to the local community

### **Better Heath at Work Silver Award**

Recognising the efforts of employers in the North East and Cumbria in addressing health issues within the workplace.

### **Great Place to Work Certification, Best Workplaces and Best Workplace for Women 2022 and 2023**

An internationally recognised independent benchmark of our positive work culture, and one of only six businesses in the North East to be judged a 'Best Workplace'



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