



CITIZENS ADVICE BUREAU  
WEST LOTHIAN  
**VISION 2024-29**

“People are valued,  
informed and empowered  
to live comfortably and be  
in control of their lives”

# OVERVIEW

Citizens Advice Bureau West Lothian has navigated its way through a challenging few years. We survived this by taking opportunities to reflect, diversify and adapt our service. This means that even during the most challenging times we have emerged strong and resilient, and this has been to the advantage of our clients who have continued to benefit from increased access to advice from our skilled workforce. We are proud of what we have achieved in the last 3 years.

Reflecting on our last strategy (2021-2024) we set out our aims and aspirations to increase staffing, access to our service and improve our financial position. This was ambitious and the Board invested in a new structure to allow us to do this and this risk paid off. We successfully achieved all outcomes during the most challenging circumstances as at times we struggled to deal with our increased demand. We are now ready to move on with our journey and to achieving our new vision and aims.

The review in 2024 identified areas of significant strength for our organisation. These strengths included the skills of our loyal staff across all levels of the organisation. Through the multiple discussions and consultation, it was recognised that there is much respect for the Bureau in our local community for delivering a quality service and how embedded the service is in the community. It is a professional non-judgmental service that offers multiple access points for people who request help.

We were keen to consult staff, partners and stakeholders when developing our next strategy for the 5 years ahead. This work has been ongoing over the last 12 months and allowed us to reflect their views and opinions into our aims and aspirations for the future, and because of this work we are confident we have identified the key actions that will be relevant to our service users. We know our clients will continue to face more challenges and pressures, and our strategic ambitions reflect how we can help our community address these.



# OUR ORGANISATION

Our clients are at the heart of our organisation and we make all decisions with the aim of benefiting them. We believe every resident in West Lothian should be informed of their rights and be empowered to act. We want to provide advice to all people, across West Lothian Communities no matter what problem they have.

Citizens Advice Bureau West Lothian was established in 1969 and exists to provide a professional, efficient, effective and accessible service of information and advice to the citizens of West Lothian, enabling and supporting them to achieve a decent quality of life and improved health and well-being. We have been a key delivery partner in the West Lothian Tackling Poverty Plan, No One Left Behind Policy and NHS Lothian Child Poverty Action Plan.

Citizens Advice Bureau West Lothian is well established in the community and the brand is well known and trusted. On an annual basis we can assist as many as 13,000 clients with 26,000 issues/problems. Our geographical area of responsibility, West Lothian, has a population of c180,000 and there are large pockets of poverty and deprivation: with 12% of families being income deprived and 26% of children living in poverty in some areas.

We recognise that we cannot meet the advice demands alone. We must continue to work in partnership to develop the best possible access to advice services in West Lothian. Funding is under pressure and funders expect greater outcomes as well as higher service delivery standards. The Bureau wants to meet these expectations with effective advice and preventative services that targets clients who need the service the most.

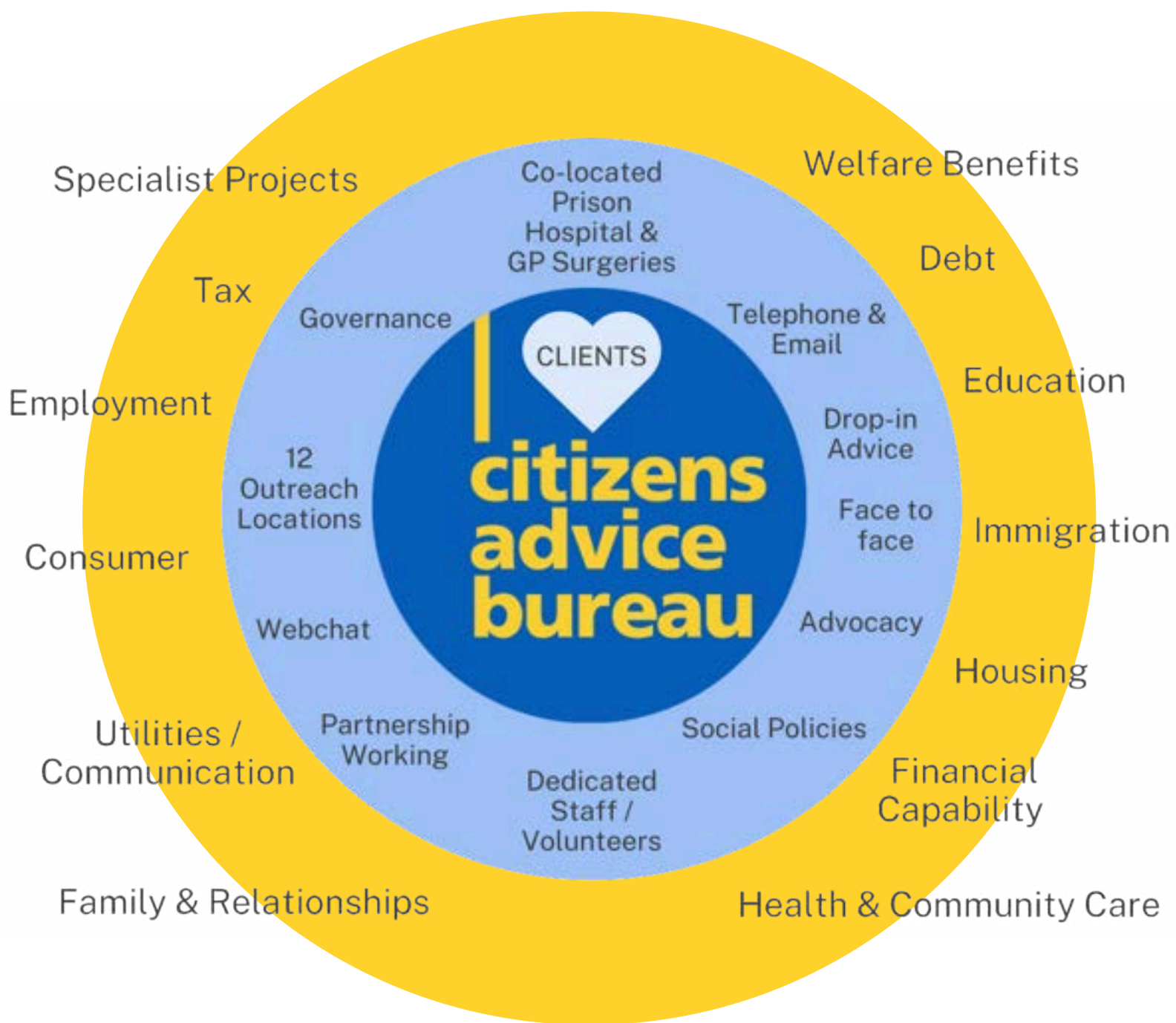
Over and above our core generalist advice service we also run several value added projects that we seek and obtain funding for. These projects provide specialist and complex advice that meets the needs of our communities and engage with some of the most vulnerable clients living in West Lothian.

Our main office is in Craigshill, Livingston. However, we are co-located and deliver outreach across West Lothian in locations where people need our help most.

Our community relies on the vital service we offer. No other agency in West Lothian offers a holistic wrap around service that is available to clients through any stage of their lives. It is incredible the difference an accessible, relevant advice service makes in our community: a service that offers clients a lifeline of support and assistance achieving positive outcomes that are long lasting.



# OUR ORGANISATION



# OUR STAFFING

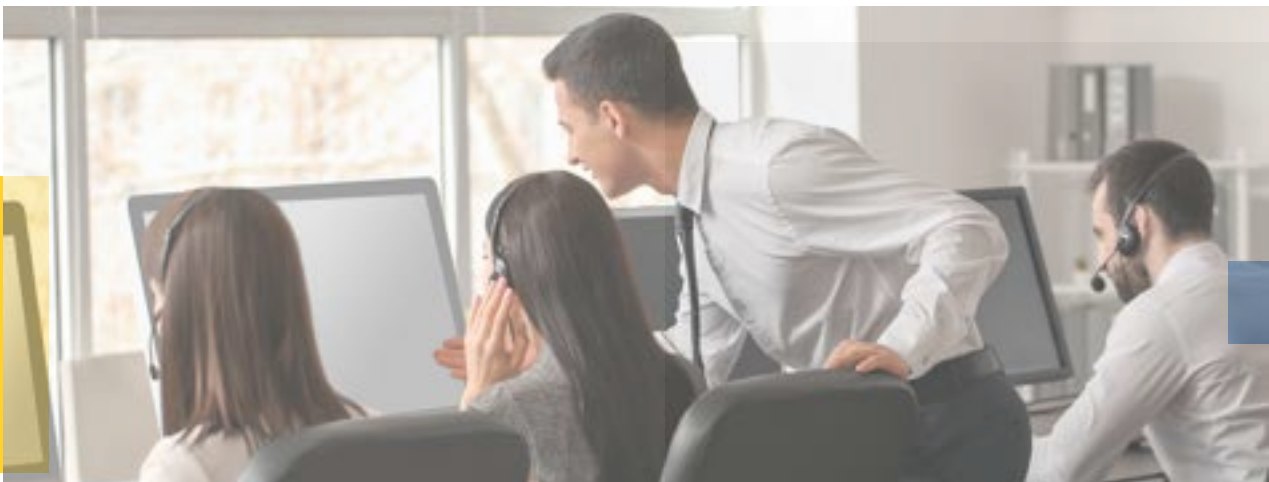
We strive to ensure CAB West Lothian is a good place to volunteer and work. Our staff are a key strength to our Bureau. Their skills, experience, expertise and passion are demonstrated in the excellent service delivered to our clients who express very high levels of satisfaction.

The Bureau currently has 40 volunteers, the majority of these delivering a generalist advice service to members of the public.

Volunteers are the backbone of our service delivery, and the Bureau will continue to prioritise the recruitment, training, and support of volunteering. Our retention rate of volunteers is high, and we recognise that offering a flexible approach to volunteering helps the Bureau continue to achieve this.

For those volunteers who wish to move into employment or other opportunities the volunteer opportunity is an ideal stepping stone as it provides key transferable skills and opportunities. 65% of the volunteers who leave the Bureau move into employment pathways. Our excellent reputation for training was recently recognised and we now run the network wide Increasing Volunteering project for the CAB network which trains volunteers from across Scotland.

Our specialist projects are delivered by paid staff. We have a total of 36 paid professional and experienced staff who have expertise in welfare benefits, appeals representation, advocacy, energy, and court work. As well as their technical knowledge they have vast experience of assisting vulnerable clients with complex needs.



# OUR GOVERNANCE

Citizens Advice Bureau West Lothian is a Company Limited by Guarantee and registered as a Charity in Scotland. (SC000630) The Board of Directors is made up of 10 elected Trustees who have a wide range of skills, knowledge and experience. The Board delegates day-to-day responsibility for the running of the Bureau to the senior management team under the leadership of the Chief Executive Officer.

The Board reviews and advises on the work of the CAB through regular meetings and is principally focused on the strategy and future of the organisation; ensuring its continuing value to all the community.

Additionally, there are Board subgroups that support the operational and strategic objectives of the Bureau, and these include the Governance, Risk and Audit, Finance and Staffing subgroups.



## OUR PARTNERSHIPS AND VALUE-ADDED PROJECTS

To deliver the best service to clients and to meet clients' needs we deliver several projects that add value to our core generalist advice service. These projects are delivered in partnerships with other organisations in order to enhance the service and support offered to clients. We cannot solve every client's problems on our own, and therefore work in partnership so that clients have the benefit of shared knowledge and experience. Our partners and stakeholders include West Lothian Council, NHS Lothian, Sodexo, West Lothian Foodbank, The Larder, Kidzeco, and Community Development Trusts.



# OUR VISION, AIMS AND PRINCIPLES



“People are valued, informed and empowered to live comfortably and be in control of their lives”

In common with all members of Citizens Advice Scotland, CAB West Lothian has twin aims

**“To ensure that individuals do not suffer through ignorance of their rights and responsibilities, and of the service available, or through an inability to express their needs”**

& equally

**“To exercise a responsible influence on the development of social policies and services both locally and nationally”**

## CAB West Lothian, as a Citizens Advice Bureau, abides by the following principles

A free service  
Confidentiality  
Independence  
Accessibility

Community accountability  
Impartiality  
Empowerment  
Effectiveness

Client right to decide  
Voluntary  
Information retrieval  
A generalist service

### Our Values

- Impartial and non-judgmental
- Openness and honesty
- Empathy
- Trust and respect
- Passionate and driven
- Continuity and reliability
- Interested
- Supportive but empowering



# OUR ASPIRATIONS

We believe that all who live in West Lothian communities should have access to the right advice, at the right time. We aim to provide advice and support to all communities within West Lothian regardless of the problem they have. We will listen, learn, advocate and develop our service so that we continue to meet the complex needs in our communities.

## LOOKING FORWARD TO 2029

Citizens Advice Bureau West Lothian has ambitious plans. Key to our future is ensuring our clients are always at the centre of our decisions. We will listen and learn about individual needs so that we provide the best access and service for all. This plan will evolve through seeking client views on how to shape what we do and ensure we remain relevant.

As a result, we anticipate a bigger and more accessible service with increased community awareness of us. Our staff will continue to be our main asset and our investment in them will be reflected in the service we deliver. Our use of digital technology will continue to develop for our staff and to provide new services to our clients.

As well as continuing our strong current partnership working, we aim to work with new partners and also to grow and expand our income to fund these services. We know this will be challenging; but we also know that our service has great opportunities because of its well regarded reputation. We are confident new partners will want to work with us to achieve common goals.

We aim to play more of a key role in advocacy work both locally and nationally.

In the next few years we will see the benefits of this new focus: we will be better informed of client issues and outcomes; our clients will have a stronger voice and we will have created a mechanism to better inform our direction.

We will use digital resources better to attract new opportunities/staff and volunteers.



# STRATEGIC OBJECTIVES

## Strengthen our People

- Increased capacity staffing / volunteers
- Invest in staff training & development
- Enhance our volunteer role options
- We will be a great employer
- Accredited training opportunities for all
- A workforce that will reflect the diversity of our communities
- Attractive work and life balance opportunities
- All staff and volunteers reaching their maximum potential

## Support our Clients

- Be a voice for change
- Enhance client satisfaction and user feedback
- Be led by the needs of our clients
- Focus on early intervention
- Actively promote and deliver advocacy to improve clients lives
- Campaign for change
- Increased access to service for other communities
- Improved access channels
- Empower clients to take action

## CLIENT

## Be a Good Partner

- Continue to develop and support current and valued partners
- Build new partners to enhance services to clients
- Create more opportunities for collaboration through effective communication and strong partnership work
- Use opportunities to generate income and develop opportunities
- Commercial partnership opportunities
- Help to build capacity and knowledge of other teams
- Playing a leadership role
- Work towards Net Zero considerations

## Improve our Access

- Improve our digital access - in emerging technology
- More accessible in our communities where access is poor
- Improve self help options for those who need it
- Be available for clients at times to suit them
- Improve premises to enhance service delivery
- New partnerships to enhance support to clients
- Client driven service delivery



# HOW WE WILL DELIVER OUR STRATEGIC AIMS

## **Provide free, independent, confidential and impartial advice**

This is the core of what we do and the unique aspect of our organisation. We are here to help everyone find a solution and the best way forward. Our organisation constantly evolves with the needs of our community. Our advice covers a wide range of specialist areas to accommodate the problems our clients have.

## **Learn, adapt, innovate and develop**

We will better collect our stats, analyse our data and use this intelligence to develop our service, and this will mean we can better support clients with their needs and requirements. We will also be better able to advocate and support for change. The power of our network means we will be able to collectively respond nationally but work to influence change locally.

## **Advocate and target solutions**

To address the complex challenges our clients face we will work together with our stakeholders and partners to address some of the most complex challenges our clients face. We cannot do this alone and need to work with others to find long term workable solutions that will really make the difference.

We will gather statistics and social impact and use this evidence to guide our work.

## **Partnership working and collaboration**

We will continue to work and support our existing partners and look at ways of improving joint services.

We will continue to identify new partners who will help us to deliver our strategy. We will ensure that we maximise the potential for the community to access our service. We will use these new relationships to attract new income opportunities that will help sustain our service.

## **Net Zero**

Work towards a net zero policy and practices for the benefit of the environment and our people.

## **Action Plan**

Appendix 1 contains detailed action/delivery plan.



# Almondbank Centre

## HOW TO CONTACT US



Phone

**01506 432977**



Email

**[wes-enquiries@cabwestlothian.casonline.org.uk](mailto:wes-enquiries@cabwestlothian.casonline.org.uk)**



Website

**[www.cabwestlothian.org.uk](http://www.cabwestlothian.org.uk)**



Office Address

**Almondbank Centre  
Shiel Walk  
Livingston  
West Lothian  
EH54 5EH**