



Transforming Local CA Services

Welcome to the Local Citizens Advice CEO conference 16th October 2024

Regional Approaches

The way ahead - shaped by us all ...

We hope you have a lovely day in Leamington Spa- don't hesitate to ask if you need any more info about practical arrangements

admin@transforminglcas.org.uk



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Here is the agenda for the day:

NB on the evening of 15th there will be a networking event from 6-7.30pm to meet existing colleagues and make new friends, followed by dinner to continue networking.

16 October 2024 - Draft Agenda- Regional approaches conference

Session Times	Theme	Facilitator
Session 1: 9.30am - 9.40am	Welcomes and how the day will run	Andy Brown
9.40am - 10.30am		
Break		
Session 2: 11.00am - 12.00pm		
12.00pm - 12.30pm		
Lunch 12.30 pm - 1.30pm	Networking opportunity Including - session for any Chief Officers who have taken up the role in the last 12 months (ish). Grab your lunch and come and share your experiences, what you are excited about, what you wish you had known!	Chris Roberts
Session 3: 1.30pm - 2.30pm		TBC
Break		
Session 3		TBC



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Cont. 3.15pm - 4.15pm		
Session 4: 4.15pm - 4.45pm		
Close		



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Here is the list of who will be there...

CEOs

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CA colleagues

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What does the peer group do?

- ★ We talk and share and help each other out.
- ★ We learn from each other
- ★ Sometimes we help each other to a new perspective or insight on an issue which resolves the problem
- ★ Sometimes we share materials which resolves the problem
- ★ Sometimes we arrive at a shared view which we raise with CA and that resolves the problem

Here are our facts and figures:

228 LCAs involved

1,335 posts on the website

250 meetings since we began

45 people on average at the calls

And all of that in addition to the 'day job' for us all...

What have we been working on together since we last met in June 24?

Wed 19th June	James from IT and Louise from Casebook , Dan on AI.
Wed 26th June	Johanna and Callum - CA Strategic Change Ed on Banking Hubs
Wed 3rd July	Champagne Corks and Banana skins - LSA with Rachel
Wed 10th July	Clare, Michele Marios from CA- and Lisa Jones re donations pot funding etc.
Wed 17th July	Ollie from somerset on Toynbee Hall and Open discussion for CEOs
Wed 24th July	Zoe Tillotson on Togetherall and wellbeing for our teams



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Wed 31st July	Open discussion for CEOs
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Wed 7th August	Toby from RM team and Venice from Strat Change Callum after them
Wed 14th August	Stuart and Siobhan on AI stuff

Wed 21st August	Sarah from Bus Dev and Matthew and Nick from Bid Team
Wed 28th August	Iso and Natalie on comms Laura from Public Affairs

Wed 4th September	Clare, Michele, Marios and Callum from CA
Wed 11th September	Jennie Smith from CA on Volunteering research
Wed 18th September	James on IT and Catherine and team on Casebook, Dan from CA on AI and Angela on adviceline ideas and info
Wed 25th September	Presentation on AI from Wyser

Highlights from all that are...

Transformation work with CA- We have been involved in a range of workshops and working groups that CA has set up both for the initial transformation of their support offer to LCAs which they hope will help address the budget challenges they are facing and also the wider transformation piece of making sure that the network is fit for purpose and maintaining and sustaining our market role in the world of information and advice services. We have a website page devoted to all this work to keep everyone up to date.



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Regional approaches - our views and experiences- this is a key piece of current work as it is increasingly recognised that we will need strong and varied regional partnerships to help us safeguard the future of our local services. This means we need to work out together who does what and in which partnerships and how we devise legal structures and governance arrangements that allow us to work in different ways and partnerships for different funders. We are also keen to work out pros and cons and practical arrangements for helping each other through some possible form of hubs and spokes systems as well as finding the best decision making protocols with CA so that where it is necessary CA has a mandate for changes which has been agreed within the network so that we can move forward and stay relevant not stuck.

Working in the world of health- this is another big project for us, working with CA to make sure that those of us who have 'cracked' this market can share ideas and experiences with those of us who have not yet secured funding and are keen to do so.

Digital transformation- there is a range of work being done on this aspect of information and advice services and we are working both within the peer group and with CA to find ways to move forward and stay relevant by grabbing lessons that we learnt in the pandemic about better ways of working so that we can help more people, more effectively. This covers both direct client services and also organisational arrangements which can often be far better with smart use of technology.

Toynbee Hall as a predatory competitor- this has historically been an issue particularly for London LCAs but with the success of Toynbee's model of remote services it is now a possible threat for all and any LCA. Not only do they have superior technology, more slick admin and organisational



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arrangements and good links with funders as well as LCA local competitors but they are now working in the field of general advice and approaching local authorities for funding. CA does state that this is low risk and are working on a full risk assessment and some associated action but there are concerns in the network that maybe CA is not moving quickly enough to protect us from what many see as a high risk.

Here are the CA people that we have worked with during the year...

Clare Moriarty
Michele Shambrook
Tracy Whaldo
Victoria Mc Gregor
Sue Theodorsen
Johanna Philips
Callum Dixon
Andrew Seagar
Daniel Marshall
Ann Booth
Carrie Deacon
Catherine Reader
Toby Parsons
Marios Leptos

Rachel Irvine
Sam Cummings
James Blackmore
Melissa Hatch
Nick Jones
Matthew Wright
Venice Marriott
Tom Macinnes
Laura Collier Keywood
Karen Edwards
David Brown
Kate Huckle
Iwan Roberts



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Here is what we have all been saying in answer to the question - *what do you think is best about our conferences...*

- Networking
- being with people and networking again

The opportunity to hear and see how CA and LCA's have far more in common than divides them

- The discussion with Clare and opportunity to catch up with colleagues between sessions
- This conference seemed so different for me. It was much more positive and inclusive. I really enjoyed the frank, open and honest comments Claire gave about where we are and how national wants to help us all achieve the best we can for our local people. Working together as a team, whether we are local or national. It was great to hear voices from national staff rather than them sitting observing. It was good to have a conversation where we all feel like we are on the same page and not opposing sides.

Working out ways we can work together on a shared vision.

- Seeing Colleagues
- The discussion at the beginning between CA and LCA's after Clare's speech, and the openness from CA about how they were feeling.

The honest and peer-led discussion.

- Networking with colleagues
- *Seeing colleagues honest dialogue with Citizens Advice staff*
- Networking
- evening before informal networking with national and LCA
- networking. an amazing lot!

Meeting up and discussing ways to move forward

- Clare's presentation and meeting a few other CEOs and National staff
- The peer-led nature of the event and desire to break down 'them and us'
- Speaking with other CEOs face-to-face
- Clare's presentation

The opportunity to develop thinking live in a safe environment with most of the players in the room. Varied views inform better decision making.

- The open conversations between local and national and everyone's positive attitude. And brilliant to meet in person
- Ability to have an open conversation with local/national staff



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- seeing people in 3d

being in-person and discussion the future of the service in a collective, collaborative and positive way

- The collaborative conversations with National
- It was great to feel things were getting back to normal
- Networking with new people, swapping ideas and meeting the national team

Networking with colleagues, especially the ones I now know from all our Google meetings

- getting together, sharing the load, sharing ideas, feeling like part of a great team all in it together
- Being together and working things out collectively - open and honest discussion amongst ourselves and back and forth with national
- Being able to see colleagues in person enabled conversations to flow and generated ideas for future development.

To network... having drinks in the bar

- Catching up with everyone and sharing issues
- Being able to see people in person again, and have some of the informal conversations with people

Seeing colleagues and everyone wanting to move forward positively together for the benefit of the service

- The opportunity to kick some big strategic challenges around.
- collaborative and communicative vibe - open and positive discussions
- meeting face to face, sharing with others
- Networking with colleagues
- Meeting up with people. Hearing others' thoughts and experiences and different perspectives

The value of an open forum - amazing. And knowing I felt similarly about a whole range of issues and not feeling isolated in that process was so valuable. And the networking opportunities were fab.

- Having one to one's with other CEOs. Some reassuring conversations that other LCA's survive without MAPS and successfully deliver a good debt service to their clients.

All of it. It could not have been better. Thank you so much.

- Meeting people face to face again - zoom is no substitute!

A sense of connection and common interests again among my peers the open dialogue between CEOs, CEOs and national CA workers - fantastic to listen to such intelligent, informed discussion of difficult challenges

- Seeing/hearing Claire



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- Meeting fellow Chief Officers face to face for the first time - as I have been in post for less than a year.
- Getting together and the chance to listen to people
- Meeting other COs and national staff in person

The entire feel of the conference was very different to previously - there was no guff and people were genuinely collaborating and listening to each other.

lunch and talking with colleagues

- Opportunity to chat to people and gain perspective of whole service issues, and in particular the table discussions.
- An opportunity to discuss in person some of the issues facing us in very challenging times

That is was arranged by COs and attended by NCA staff. This gave a better opportunity for real honest and meaningful discussion.

- Reconnecting with other CEO's
- Meeting people, chatting to other new COs, learning from others more experienced. It was so well organised. Food was great. Loved the openness and sharing. Felt really supported as a 'newbie'. Was great to hear from Claire and I appreciated her time.

‘Positivity and looking forward rather than back’