

*Citizens Advice Bureau  
Wellington*

*Service Review*

*December 2018*

Lucy Trevelyan, Area Manager  
Citizens Advice Bureau Wellington  
Mezzanine Floor, Central Library  
65 Victoria Street  
Wellington 6011

6 December 2018

***Review of Citizen Advice Bureau Wellington's Services***

Dear Lucy,

Thank you for the opportunity to assist Citizens Advice Bureau Wellington (WelCAB) with the above review.

Our report has been prepared in line with our letter of engagement dated 11 July 2018. We have performed a current state review of WelCAB's existing operating model as it relates to services – with a focus on the following key operating model components: products and services, clients, channels, information, partners, financial model and location / facilities. We then used current state findings to identify a set of key opportunities, which were then used to inform both short-term and long-term recommendations. Our detailed findings are presented in the attached report.

We would like to take this opportunity to thank the many staff and volunteers of WelCAB and Wellington City Council who have given freely of their time and insights to contribute to this review. It has been a privilege working with the WelCAB team. Please do not hesitate to contact us if you have any questions or require any further information.

Yours sincerely



Valerie Wheeler  
**Partner**  
[Valerie.a.wheeler@pwc.com](mailto:Valerie.a.wheeler@pwc.com)  
+64 21 054 6965



Lorna Brennan  
**Director**  
[Lorna.c.brennan@pwc.com](mailto:Lorna.c.brennan@pwc.com)  
+64 21 0237 5906

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# How to read this report


## *The body of this report is split across 2 lenses: service users and service funders*

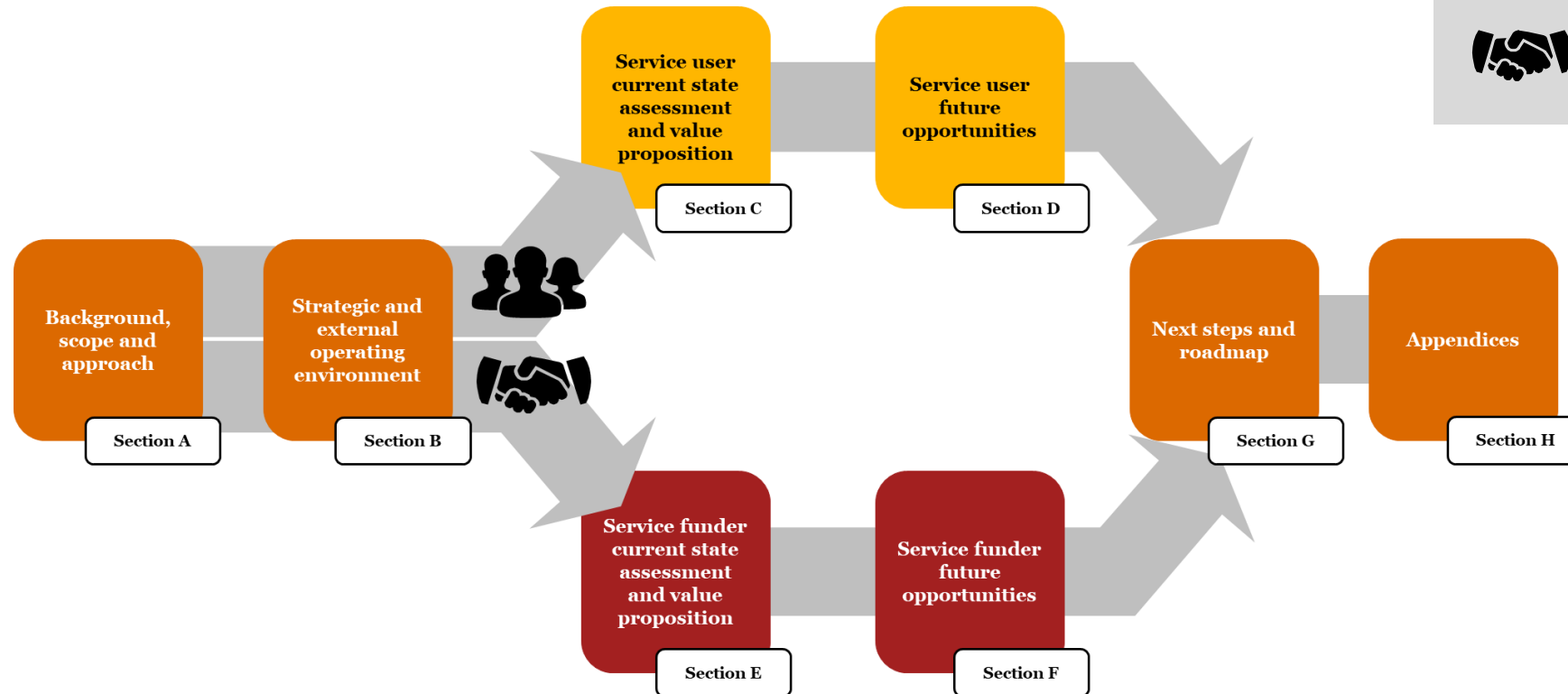
Not-for-profit (NFP) organisations differ from for-profit organisations in that NFPs create value for their beneficiaries / service users but often do not receive payment or compensation from these individuals. Instead, NFPs typically receive funding from a different source. It is for this reason that NFPs need distinct value propositions for service users and service funders.

Using this rationale, we have split the body of this report into 2 sections – the first focuses on service users and the second on service funders. The start and the end of the report show a combined view. The diagram below provides information on the major sections in this report. Colour coding is used to indicate combined sections (orange), service user sections (yellow) and service funder sections (dark red).

*Throughout the report the symbols below are used to provide a quick section reference*

 **Service user section**

 **Service funder section**



# Executive Summary

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# Executive Summary

## Background

The Citizens Advice Bureau Wellington (WelCAB) is a member of the national organisation, Citizens Advice Bureaux New Zealand Incorporated (CABNZ), which is an independent civil society organisation made up of numerous individual bureaux throughout New Zealand. The organisation aims to:

- Ensure that individuals do not suffer through ignorance of their rights and responsibilities or of the services available; or through an inability to express their need effectively.
- Exert a responsible influence to the development of social policies and services both locally and nationally.

To fund its services, WelCAB relies predominantly on a 3-year operational funding grant from Wellington City Council (WCC). Following a recent review of WelCAB's current funding agreement, WCC agreed to provide WelCAB with a one-off funding grant to engage an independent party to review WelCAB's services. The intention of the review was to help inform WCC's decision around future funding arrangements. PwC was engaged to perform the review.

## Review of WelCAB's services

Not-for-profit (NFP) organisations differ from for-profit organisations in that NFPs create value for their beneficiaries / service users but often do not receive payment or compensation from these individuals. Instead, NFPs typically receive funding from a different source. It is for this reason that NFPs need distinct value propositions for service users and service funders. Using this rationale, we have split the body of this report into two sections – the first focuses on **service users** and the second on **service funders**.

We also used an operating model framework to identify components within the organisation relevant to service delivery and hypothesis-based problem solving to guide our analysis.

## Findings on WelCAB's value propositions

Through the review, we confirmed WelCAB's two unique value propositions:

**Service-users:** WelCAB's *accessible, accurate, confidential and independent* advice *empowers* Wellingtonians to solve problems, understand their rights, access services, and enhance their personal and community well-being

**Service funders:** WelCAB's services help funders reach harder-to-serve Wellingtonians more *effectively* and *inexpensively* than funders can in-house, *preventing greater vulnerability, building communities, and gathering data* for actionable insights

## Summary findings and recommendations

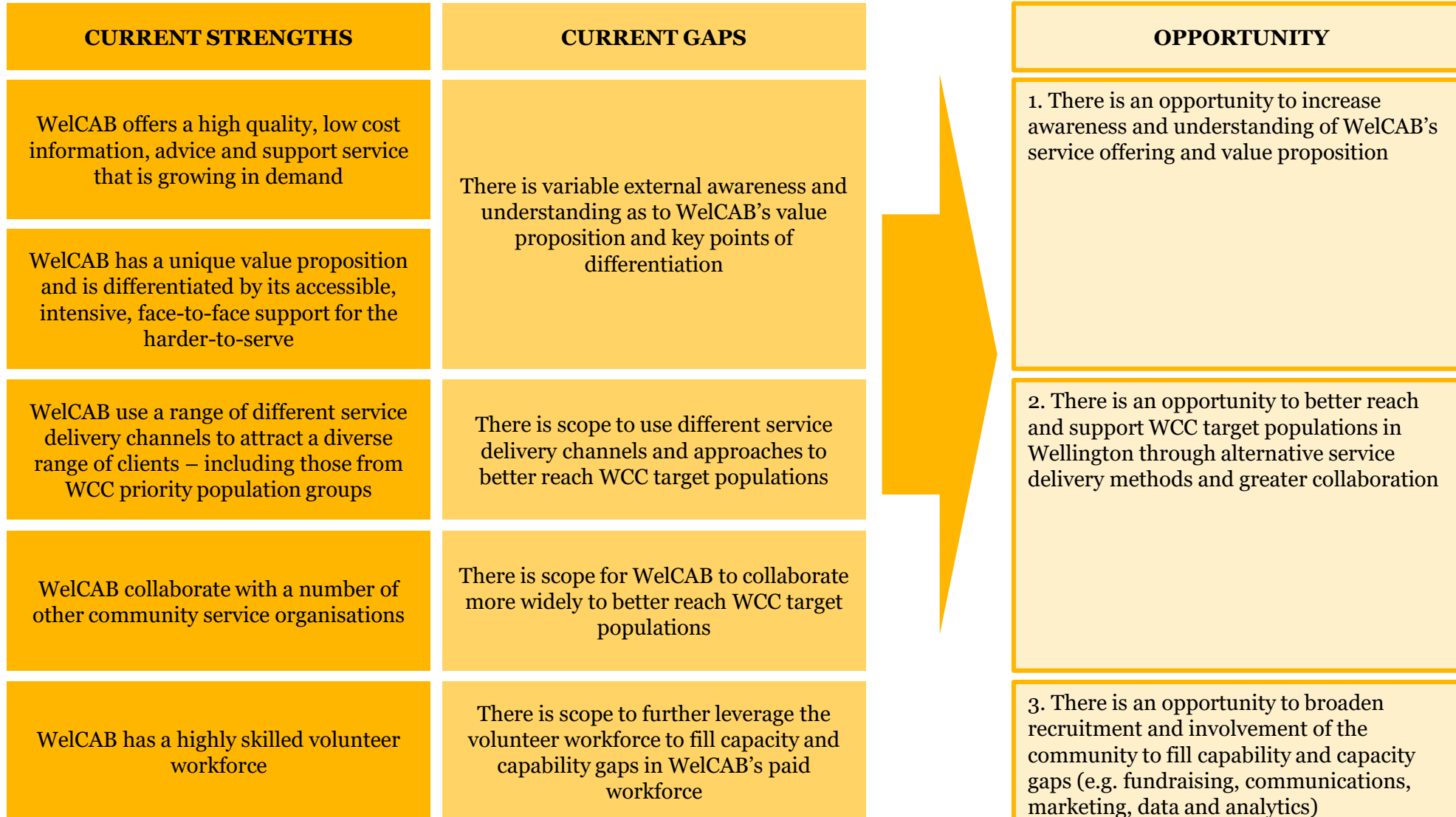
Our summary findings and recommendations are presented on pages 7 to 10. These are split between findings and recommendations for service-users and those for service funders. The summary pages present:

- Current strengths
- Current gaps
- Resultant opportunities
- Recommendations.

## Selection and prioritisation of recommendations

This review presents a comprehensive set of recommendations – noting that these are not currently funded. Within the set of recommendations we have identified a number of 'must do' recommendations that we believe are critical to WelCAB's continued success and relevance. These are shown in **bold** on pages 8 and 10.

# Service user summary

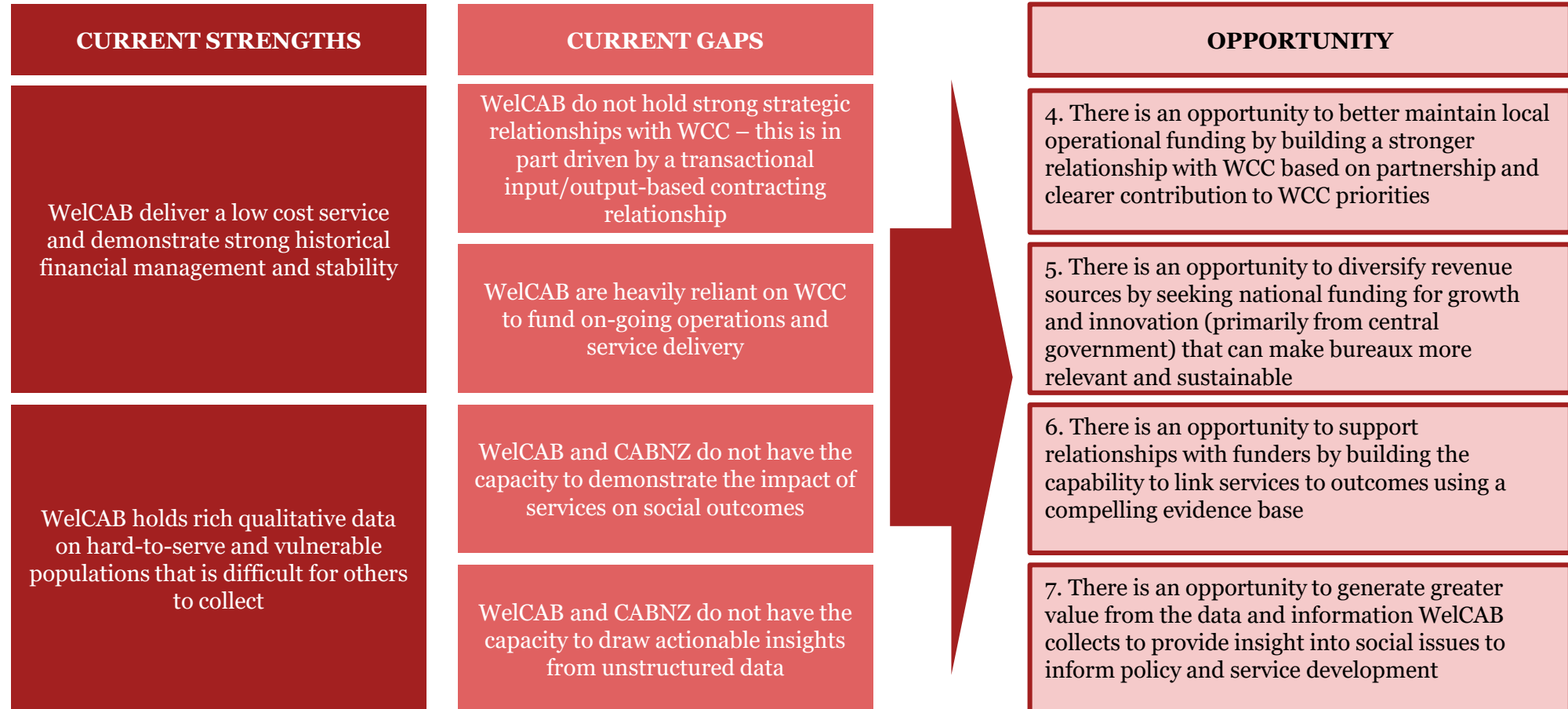


# Summary of service user recommendations

OPPORTUNITY	<i>Do differently in the short term...</i>	<i>Do differently in the long term...</i>
1. There is an opportunity to increase awareness and understanding of WelCAB's service offering and value proposition	<ul style="list-style-type: none"> <li>• <b>Develop a set of reusable communication materials (on WelCAB's service and value proposition) and share these on an on-going basis across multiple channels</b></li> <li>• Enhance WelCAB's face-to-face service by improving volunteer capability and confidence in the use and navigation of technology and the 'digital environment'</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Develop a communications and marketing strategy and actionable plan to increase awareness and uptake of WelCAB's services in the long term</b></li> <li>• <b>Develop strategic relationships with local and central government to improve WelCAB's service agility and responsiveness</b></li> </ul>
2. There is an opportunity to better reach and support priority populations in Wellington through alternative service delivery methods and greater collaboration	<ul style="list-style-type: none"> <li>• <b>To align with WCC's (and the wider social sector's) current and future definitions of priority populations – work with CABNZ to adjust and introduce future flexibility / agility into data definitions</b></li> <li>• Develop information materials relevant to youth and share proactively through existing service delivery channels</li> <li>• Identify and use digital applications that could support real time language translation</li> <li>• Establish drop in sessions at social housing complexes in Wellington</li> <li>• Address existing challenges with the Strathmore satellite service by adopting more effective outreach methods</li> </ul>	<ul style="list-style-type: none"> <li>• Explore new engagement methods for youth – with a focus on digital channels</li> <li>• Provide more holistic support to refugee clients based on refugee resettlement outcomes</li> <li>• Target schools and universities to proactively share information and provide 'on-the-spot' support</li> <li>• Explore opportunities to extend WelCAB's existing 'hub' model by integrating with other new community service providers e.g. Tawa and Linden Plunket Clinics, Berhampore Community Centre</li> </ul>
3. There is an opportunity to broaden recruitment and involvement of the community to fill capability and capacity gaps (e.g. fundraising, communications, marketing, data and analytics)	<ul style="list-style-type: none"> <li>• Explore opportunities for volunteers to support discrete 'back office' tasks (based on capability and capacity gaps in WelCAB's paid structure)</li> <li>• <b>Explore opportunities to receive pro bono support from private organisations</b></li> </ul>	<ul style="list-style-type: none"> <li>• Develop and implement a youth volunteer strategy to increase youth participation</li> </ul>



# Service funder summary



# Summary of service funder recommendations

OPPORTUNITY	<i>Do differently in the short term...</i>	<i>Do differently in the long term...</i>
<p>4. There is an opportunity to better maintain local operational funding by building a stronger relationship with WCC based on partnership and clearer contribution to WCC priorities</p>	<ul style="list-style-type: none"> <li>• <b>Identify a set of easy and inexpensive ‘quick wins’ to improve the current relationship between WelCAB and WCC leaders and Councillors</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Transform WelCAB and WCC’s on-going operational relationship from a transactional input/output-based contractual relationship to a collaborative strategic partnership</b></li> <li>• WelCAB and WCC should use a project specific partnering approach for future transformation projects</li> </ul>
<p>5. There is an opportunity to diversify revenue sources by seeking national funding for growth and innovation (primarily from central government) that can make bureaux more relevant and sustainable</p>	<ul style="list-style-type: none"> <li>• <b>Take steps to strengthen the existing ‘Local Nationaliser’* funding model by strengthening relationships with WCC, increasing awareness and leveraging volunteer capability</b></li> </ul>	<ul style="list-style-type: none"> <li>• Revise the organisational funding model to include new national funding streams from central government for future growth, innovation and resilience</li> </ul>
<p>6. There is an opportunity to support relationships with funders by building the capability to link services to outcomes using a compelling evidence base</p>	<ul style="list-style-type: none"> <li>• <b>Work with WCC to develop some sample reports for delivering insight (i.e. dashboard reporting and emerging social trends)</b></li> <li>• <b>Leverage volunteers to identify additional local analytical capability (see opportunity 3 on page 8)</b></li> </ul>	<ul style="list-style-type: none"> <li>• Develop a national CABNZ information, insights and reporting function to enable outcome-based performance measurement / reporting and proactive generation of insight (note: this will require implementation of the long-term hybrid funding model per opportunity 5 above)</li> </ul>
<p>7. There is an opportunity to generate greater value from the data and information WelCAB collects to provide insight into social issues to inform policy and service development</p>		

Critical ‘must do’ recommendations for WelCAB are shown in **bold**

\***Source:** Foster, W. L., Kim, P. & Christiansen, B. (2009). *Ten Nonprofit Funding Models*. Stanford Social Innovation Review, Stanford Graduate School of Business.

# Next steps and high level roadmap

## Funding implications

The catalyst for this service review was an assessment by WCC of the funding provided to WelCAB, so it is important to view the future recommendations through this lens.

As shown by the detailed analysis in this report, WelCAB are already operating at the limit of existing financial and personnel constraints and offering a quality service at low cost. As a consequence, it is unrealistic to presume that WelCAB will be able to undertake recommendations without securing additional resource / funding.

## Working together to advance short term recommendations

In the immediate future, we recommend WelCAB and WCC work together to discuss and agree **short-term next steps, priorities and actions** before the April 2019 WCC Grants Committee meeting (where WelCAB will submit and present a funding application for the next 2 years). In this discussion, we suggest a focus on the following:

- Prioritisation / ranking of the critical ‘must do’ **short-term** recommendations, which should consider the objectives, expectations and constraints of both WelCAB and WCC (note: prioritisation could be performed against a matrix of impact vs. feasibility).
- Identifying those high priority ‘must do’ **short-term** recommendations that will require additional funding – and discussing whether WCC would be willing to provide one-off project funding.
- Framing up the funding application for the next 2-year period.
- Agreeing the nature of the relationship between WelCAB and WCC over the next 2-year period, including the nature of the contract (i.e. input vs. output).

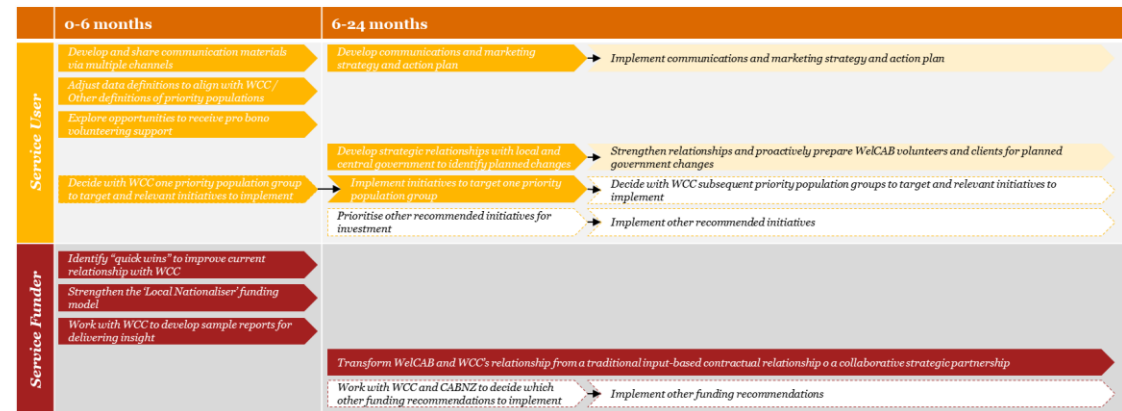
## Working together to advance longer term recommendations

Once WelCAB and WCC have finalised the funding agreement for the next 2-year period, we suggest both organisations engage in a series of collaborative planning sessions to discuss and agree **longer-term next steps, priorities and actions**. During these sessions, we suggest a focus on the following:

- Prioritisation / ranking of the remaining recommendations (with a focus on the ‘must do’ **longer-term** recommendations).
- Identifying those **longer-term** recommendations that will require additional funding – and identifying viable funder options (where WelCAB / CABNZ should consider adopting a new funding model that includes central government funding for transformational activities).
- Agreeing the nature of the **long-term** relationship between WelCAB and WCC – and identifying different and more collaborative ‘ways of working’.

## Timeline

An indicative timeline is presented below and on page 113. This timeline is contingent on WelCAB securing additional funding.



# A. Background, scope and approach

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# Background, scope and approach

## Background

The Citizens Advice Bureau Wellington (WelCAB) is a member of the national organisation Citizens Advice Bureaux New Zealand Incorporated (CABNZ), which is an independent civil society organisation made up of numerous individual bureaux throughout New Zealand. The organisation aims to:

- Ensure that individuals do not suffer through ignorance of their rights and responsibilities or of the services available; or through an inability to express their need effectively.
- Exert a responsible influence to the development of social policies and services both locally and nationally.

The Bureau provides free, impartial and confidential information, guidance and support. It also makes responsible use of the experience and insights it gains from providing these services.

To fund its services, WelCAB relies predominantly on a 3-year operational funding grant from Wellington City Council (WCC). Following a recent review of WelCAB's current funding agreement, WCC agreed to provide WelCAB with a one-off funding grant to engage an independent party to review WelCAB's services. The intention of the review was to help inform WCC's decision around future funding arrangements. PwC was engaged to perform the review.

## Scope

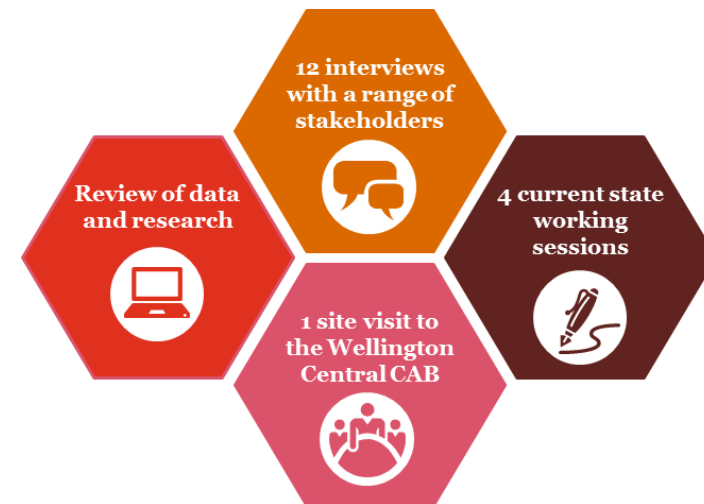
While this service review is focussed on WelCAB, there are parts of the WelCAB operating model that either interact with or are reliant upon CABNZ (such as the funding model, organisational policies and service delivery standards). As such, parts of this review will make reference to CABNZ.

## Our approach

First we worked with both WelCAB and WCC to develop a terms of reference to guide the direction of the review. We then used an operating model framework (see following page) and hypothesis-based problem-solving methods when completing the following steps:

- Performed interviews, research and other forms of analysis to develop our initial hypotheses
- Validated, discarded and refined our hypotheses through further interviews, research and analysis
- Drafted our initial findings and tested these with both WelCAB and WCC
- Sought feedback and completed any final supplementary research and analysis to complete and finalise our findings and recommendations.

Data and information was collected via the following sources:

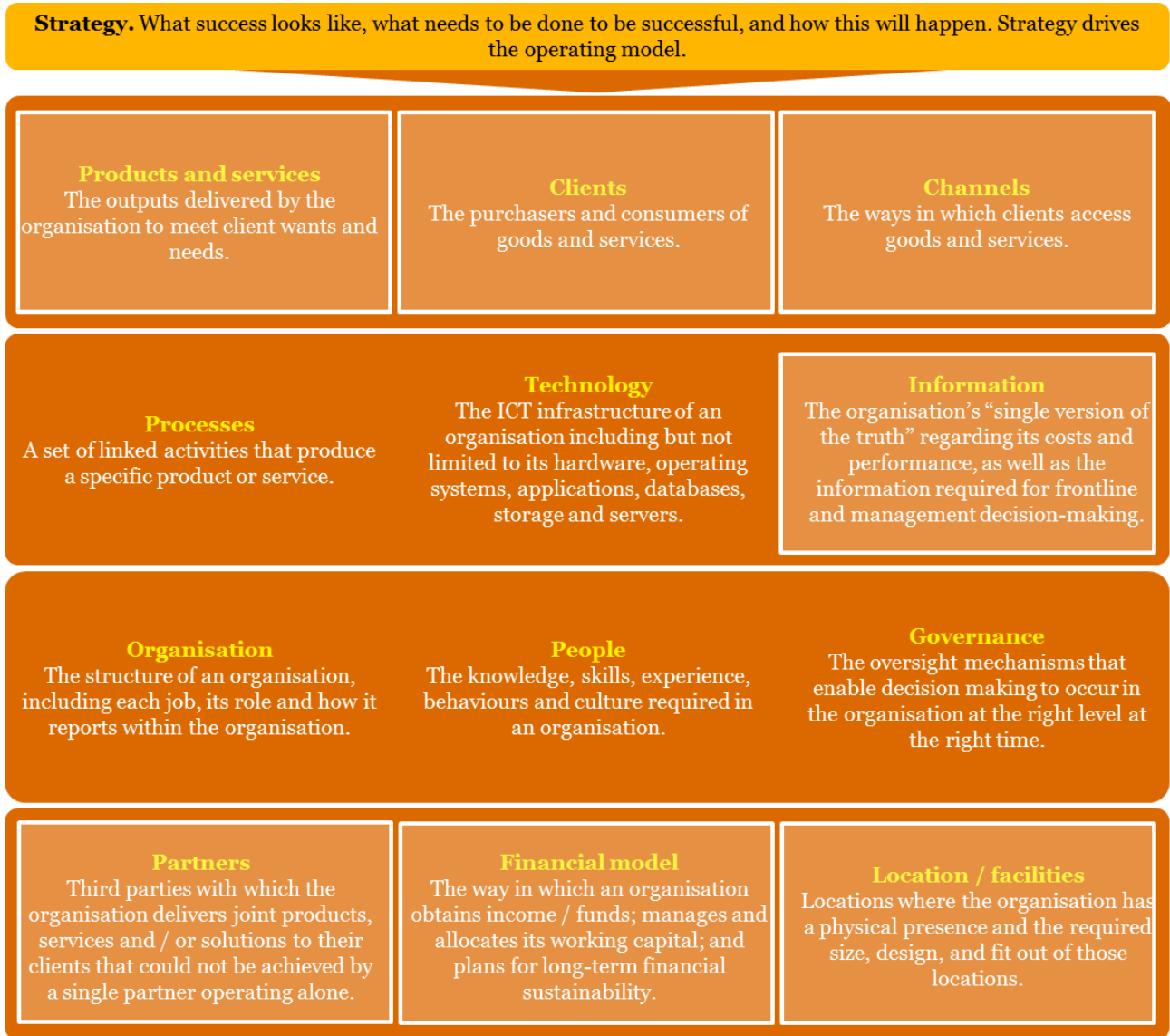


# Operating model framework

*We have focussed our work on those components of the operating model relevant to service delivery*

The diagram to the right shows which components of the operating model have been included in the scope of this review (see highlighted boxes):

1. Products and services
2. Clients
3. Channels
4. Information
5. Partners
6. Financial model
7. Locations / facilities



# B. Operating environment

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# WelCAB strategy and priorities

*WelCAB's 3-year strategic objectives centre on the quality of services and relationships*

## Objectives:

- Provide quality services that are innovative and responsive to community needs
- Be supportive and effective in engaging with our volunteers and staff
- Increase accessibility to our services
- Develop strong relationships with key organisations and communities to create new opportunities to deliver the desired outcomes and enhance effectiveness
- Secure ongoing and adequate funding and resources for the bureau
- Develop policies and procedures for the sound governance and operational management of the bureau



## Aims:

- To ensure that individuals do not suffer through ignorance of their rights and responsibilities or of the services available; or through an inability to express their needs effectively.

*Me noho mataara kia kaua te tangata e mate i tōna kore mōhio ki ngā āhuatanga e āhei atu ana ia, ki ngā mahi rānei e tika ana kia mahia e ia, ki ngā ratonga rānei e āhei atu ana ia; i te kore rānei e āhei ana ki te whakaputa i ōna hiahia kia mārama mai ai te tangata.*

- To exert a responsible influence on the development of social policies and services, both locally and nationally

*Kia tino whai wāhi atu ki te auahatanga o ngā kaupapa ā-iwi me ngā ratonga ā-rohe, puta noa hoki i te motu.*

## Outcomes:

- The people of Wellington have the information and advice they seek, are aware of their rights and responsibilities, are aware of the resources and services available to them and are assisted to make sound personal decisions.
- The development of social policies and services by both central and local government is enhanced through the responsible use of information acquired by the bureau on social trends and community needs.

# WCC long-term plan and priorities

***Relevant components of WCC's plans and priorities are focused on development of the Wellington community***

## ***Long-Term Plan (2018-28)***

- **Housing (Priority)** - Enabling people to have good housing choices and be able to afford to buy homes in our city. To make this possible, we propose to be more actively involved in making sure there is enough high-quality housing stock in the city in the future. This includes increasing the number, quality and affordability of housing, as well as providing adequate supported living / social housing.
- **Economic Development (Objective)** – support economic growth to enhance quality of life. This includes economic performance.
- **Social and Recreation (Objective)** – develop strong, healthy communities. This includes access to and participation in recreation and leisure; health and well-being outcomes of Wellington residents; resilient and cohesive communities and neighbourhoods; and public health and safety.
- **Urban Development (Objective)** – maintain a compact, resilient and attractive city. This includes housing affordability and supply; growth and density; high quality urban form; and resilience.
- **People-centred City (Outcome)** – The city is healthy, vibrant, affordable, accessible and resilient, with a strong sense of identity and plan.
- **Connected City (Outcome)** – Wellington is a connected city, with easy access to regional, national and global networks. Connections are physical, allowing for ease of movement of people and goods; virtual, in the form of world-class ICT infrastructure; and social, enabling people to connect with each other and their communities.

### Goal 1

**More Resilient** - enabling people, communities, institutions and businesses to survive, adapt, and grow no matter what kinds of chronic stresses and acute shocks they experience. In particular:

- ✓ **Focus area 3: connected and prepared communities** – improving connection to communities and neighbours; supporting access to resources / spaces to look after themselves and those in need; supporting access to information to make decisions that increase resilience.

### Goal 2

**Smarter Growth** - working with the community and stakeholders to ensure the city develops and grows in ways that are inclusive and meets their aspirations, and investing to grow the overall economy and support the continued transition towards a thriving knowledge economy. In particular:

- ✓ **Focus area 2: housing people** – introducing new housing units; increasing the number of social and affordable housing units; reducing homelessness; ensuring rental properties meet quality standards.

### Goal 3

**People-focused** - creating a culture that is welcoming, creative and encourages people to tell their stories and express their identities. In particular:

- ✓ **Focus area 2: community planning, facilities and utilisation of spaces** – taking a place-based approach to community development; creating new / improved options to deliver community spaces that support volunteers and community groups; and increasing utilisation of WCC facilities.
- ✓ **Focus area 3: clean, green, safe and inclusive city** – reducing alcohol harm; delivering a wet house; achieving SmokeFree city status; becoming a UNICEF Child Friendly City; working with partners to reduce inequality and social deprivation.

### Grants Committee

- ✓ **Target populations and areas** - support the needs of specific target groups and areas in Wellington. Target populations include youth, refugees, social housing tenants. Target areas include Strathmore and Linden.
- ✓ **Cooperation and collaboration with other groups and service providers** – work with other organisations to collaborate and achieve greater impact in the Wellington community.
- ✓ **Financial sustainability** – develop a strategy to ensure that WelCAB is financially sustainable in the future.

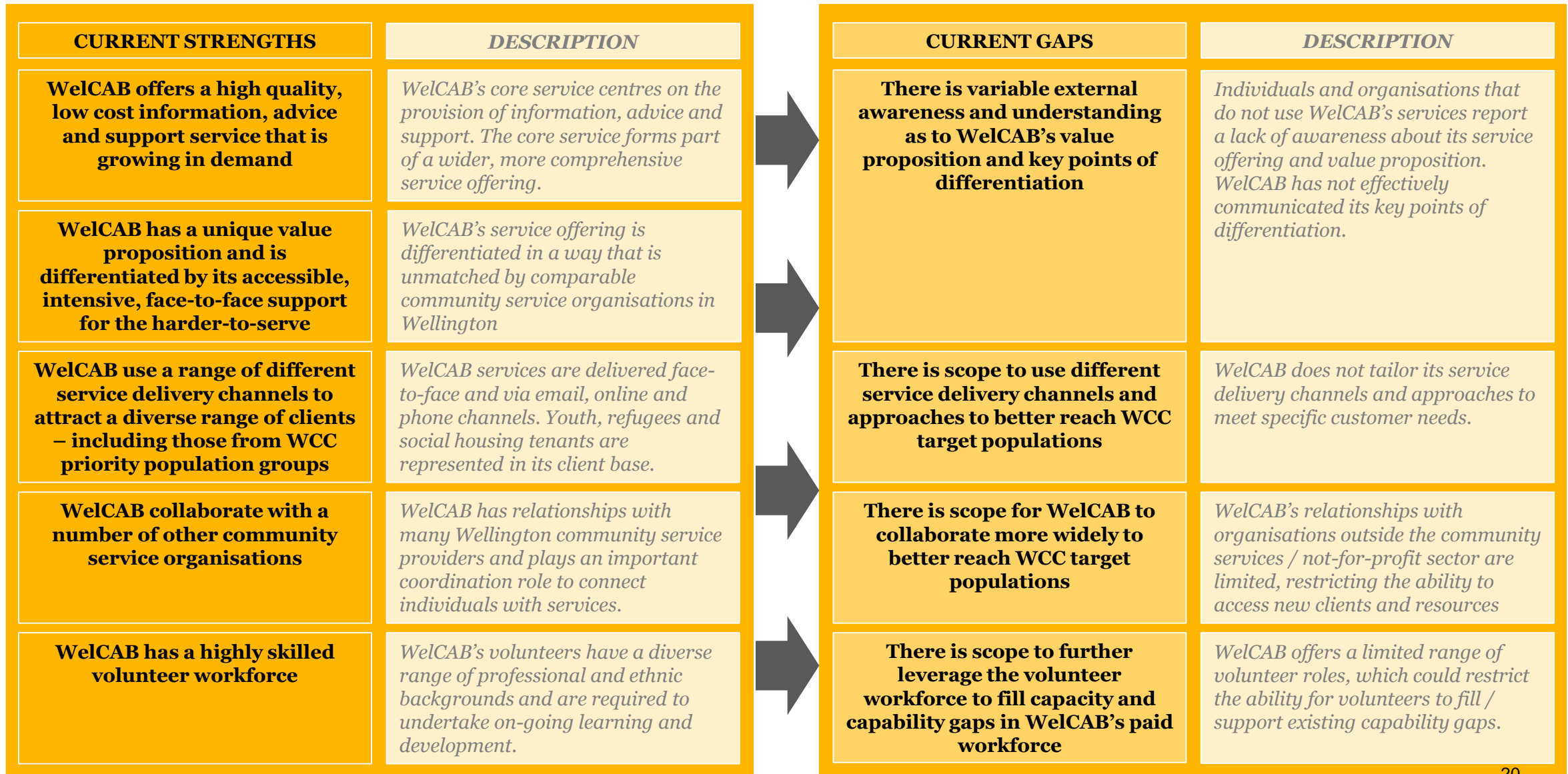


# C. Service user current state assessment

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# Service user current state summary





# Service user value proposition

WelCAB's *accessible, accurate, confidential* and *independent* advice empowers Wellingtonians to solve problems, understand their rights, access services, and enhance their personal and community well-being

## ***Accessible***

Services are *free* across *multiple channels*. In general, *no appointment* is required, and there are *no time limits* for interactions. WelCAB provide services in *multiple languages*, and a single volunteer can *navigate many services and organisations*.

## ***Accurate***

*Well trained* volunteers are carefully *vett*ed. They are supported by *comprehensive, up-to-date tools*, and advice is *quality assured* for accuracy.

## ***Confidential***

Some service users – especially those who are new to NZ or who have had negative service experiences in the past - *feel comfortable sharing* their problems with WelCAB because they can do so *anonymously*.

## ***Independent***

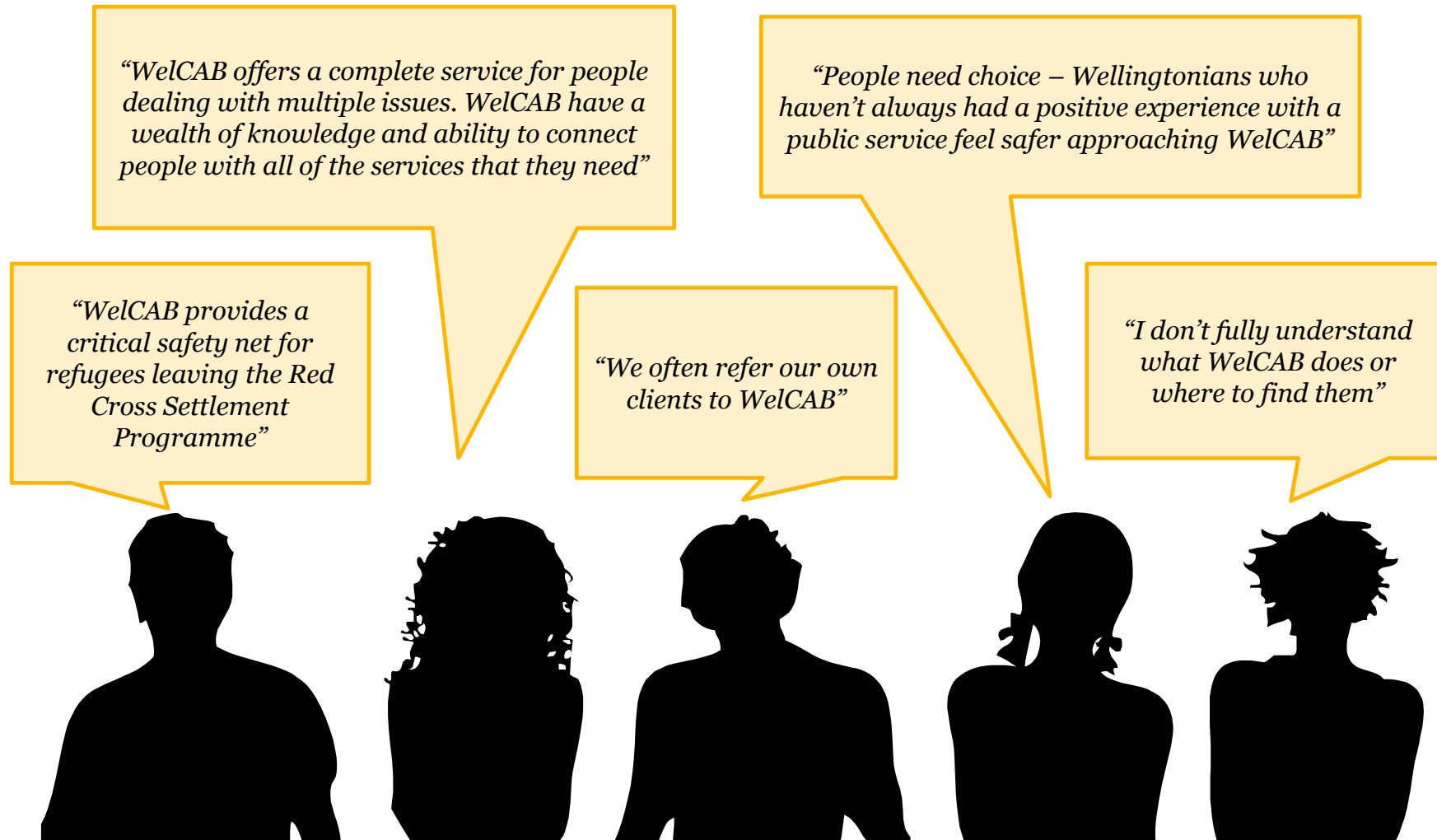
There will always be some people who prefer to get services from a *community-based organisation* than from a government agency. WelCAB's independence creates a *unique position to build trust* with people who see it as more *impartial* and *fair* and want a *choice* in who provides information and advice.

## ***Empowering***

Volunteers are trained to be *empathetic* and *non-judgemental*. They help service users not only to *solve their current problems* and *understand their rights* but also to *build their knowledge and skills* to solve future problems more independently and *help others*.



# Service user interview themes





# Wellington service offering

## ***WelCAB has a comprehensive service offering centred around the provision of information, advice and referral***

WelCAB's service catalogue is comprised of **6 service categories and 18 individual services**. The categories are:

1. Public facing information, advice and referral
2. Hosting other service providers
3. Practical support
4. Intensive 1-On-1 support
5. Data and insights
6. Emergency support

All of WelCAB services are open to anyone and available for free. The diagram to the right depicts the full and comprehensive set of services available through WelCAB. It is this service offering as a whole that enables WelCAB to provide a high range and level of support to individuals in need, whatever their circumstances or problem.

Of the service 6 categories, the **public-facing information, advice and referral category** represents WelCAB's core service offering and is delivered by WelCAB volunteers (see red outline). Categories 2, 3 and 4 represent supplementary services that enable WelCAB to provide clients with greater level of support by meeting a diverse range of needs from a single location. Category 5 is a nationally operated service, but relies on WelCAB's workforce to keep the information included in cabinet accurate and up-to-date. Category 6 is a stand alone and separately funded service which will only be required in the event of a major emergency event in Wellington.

WelCAB  
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service

CABNZ-  
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service





# CABNZ service support and infrastructure

## WelCAB is supported by CABNZ national infrastructure that is funded predominantly by central government

Another noteworthy feature of WelCAB’s service delivery is that it is strongly supported by the CABNZ national infrastructure. This means that Wellingtonians benefit from being able to access local services delivered and resourced directly by WelCAB (orange boxes) as well as national services delivered and resourced by CABNZ (yellow boxes).

### 1. Public-facing Information, Advice and Referral – provide information and advice directly to users or refer them to other organisations

**1.1 General Information, Referral and Advice**  
Providing free and independent information, guidance and support around a wide range of topics such as citizenship and immigration, conditions of work and housing. This also includes assisting clients to access information / services online or referring to other local providers.

**1.2 Specialist information and advice**  
Helping people access specialist advice of a more technical nature. This advice is often delivered by specially trained CAB volunteers or other individuals / organisations hosted at CAB branches. Where appropriate, clients may be referred to this service by other CAB volunteers.

**1.3 Migrant Connect**  
Providing face-to-face settlement services to new migrants. This includes sharing information and options in response to face-to-face enquiries, as well as running information sessions on specific topics of interest such as employment; the health and education systems; and feeling at home in the local community.

**1.4 CAB Community Directory**  
Maintaining a comprehensive directory on the CAB website that provides information on over 35,000 local and national services and organisations. The search function allows people to browse the Community Directory to find services / organisations within a specific location.

**1.5 Language Connect**  
Working directly with clients and in conjunction with other CABs / service providers to ensure that individuals are not disadvantaged by the barrier of language. They do this by providing information and advocacy services on a wide range of issues.

**1.6 People in Prison**  
Providing a specific phone system for people who are in prison for information, options and advice around issues such as managing debt or other financial responsibilities while in prison; legal processes; relationship issues; complaints processes; and services or information they need in preparation for release.

### CABNZ national infrastructure shared with local bureaux includes:

- Development, maintenance and upgrades of cabinet (described in more detail on page 31)
- National learning and development for staff and volunteers, including creation and development of resources
- Delivery, coordination and management of national services, including Language Connect and People in Prison
- Analysis of data and information to generate insight (to fulfil CAB’s advocacy role and to respond to specific enquiries)
- Guidance to support the CAB’s commitment to Māori as tangata whenua, to support te reo Māori to grow, and to understand tikanga Māori and give life to this in the CAB
- Operation of a free client phone number
- Branding and marketing materials

### 2. Hosting other Service Providers – provide access to specific services delivered by other organisations from WelCAB branches

**2.1 Justice of the Peace Services**  
Giving access to “JPs” who can witness documents such as applications for citizenship and take declarations, affidavits or affirmations. They can also certify copies of documents.

**2.2 Workers Rights Service**  
Giving access to employment specialists who provide a free drop-in service for low income workers with employment questions and issues.

**2.3 Legal Services**  
Working with clients referred by CAB to provide initial legal support in response to more complex / urgent legal problems. These services are delivered by local lawyers from CAB branches.

### 3. Practical Support – provide access to equipment and goods

**3.1 Access to CAB Equipment**  
Giving access to CAB equipment such as phones, computers, photocopiers and scanners so that clients can complete personal administrative tasks. In particular, this includes supporting clients to access services that can now only be reached through the digital channel.

**3.2 Emergency Food Assistance**  
Giving direct access to food providers through the close working relationships that CABs hold with local food banks / emergency food parcel providers in their communities. This includes distributing food from CAB branches on behalf of other providers.

**3.3 Curtain Bank Service**  
Acting as an agent for local curtain banks to offer free curtains to families / individuals who do not have curtains or have a medical condition affected by the cold. This includes distributing application forms, assisting clients to make appointments to choose their curtains and serving as a collection point for donated curtains.

### 4. Intensive 1-on-1 Support – provide a combination of information, advice, referral and practical support for clients with complicated needs that require significant attention

**4.1 Budgeting Services**  
Working with clients referred by CAB and WINZ to provide intensive budgeting assistance in response to more complex / urgent financial problems. In more serious cases this includes talking to lenders on behalf of the client, assisting clients to consolidate their debts and helping clients file for insolvency.

**4.2 Correspondence and Forms**  
Providing general administrative support and assistance in filling in out forms and writing letters (e.g. where a client has poor literacy skills). Also assist clients by providing advice and practical assistance to complete official forms and documentation such as immigration applications.

**4.3 Individual Practical Advocacy**  
Representing or accompanying clients at meetings and tribunals for a wide range of issues such as tenancy, WINZ eligibility, consumer rights and employment.

### 5. Data and Insights – use data from client enquiries to advocate for social policies and share insights

**5.1 Social Policy Advocacy**  
Learning from client enquiries and using this knowledge to advocate for social policies and services in New Zealand. This includes proactive advice and responses to consultations.

**5.2 Respond to Enquiry**  
Responding to specific questions (e.g. from media or external stakeholders) by analysing client enquiry data.

### 6. Emergency Support – provide emergency assistance

**6.1 Emergency Support**  
Providing support in the event of an emergency in Wellington. This includes providing planning support to the Local Welfare Manager and Local Welfare Committee, and training volunteers to register people and animals during and post event.

WelCAB  
-run  
service

CABNZ-  
run  
service





# Service differentiation

## *WelCAB's service offering is differentiated in a way that is unmatched by comparable community service organisations in Wellington*

With reference to WelCAB's unique value proposition (page 21), the table below presents an assessment of the ways in which WelCAB's service offering is differentiated from other comparable community service organisations in Wellington. The assessment shows that WelCAB's service offering is clearly differentiated by its unique combination of characteristics (being accessibility, accuracy, confidentiality, independence and empowerment). The collective presence of all of these characteristics sets WelCAB apart.

### Comparison with like organisations

Organisation	Accessible	Accurate	Confidential	Independent	Empowering
WelCAB	✓	✓	✓	✓	✓
Salvation Army	X Mix of free / low cost	✓	✓	✓	✓
Wellington City Council	X Narrow advice	✓	X Provide ID e.g. tenant details	X Government, often landlord	X Generally resolve specific issue
Community Law	X Time limited, restricted eligibility	✓	✓	✓	✓
Community Centres	X Mix of free / low cost	X Untrained volunteers	✓	✓	X Mixed services, often one off
Consumer NZ	X Mix of free / low cost	✓	✓	✓	X Generally resolve specific issue
Red Cross	X Narrow advice	✓	✓	✓	✓
Wellington City Mission	X Narrow advice	✓	✓	✓	✓



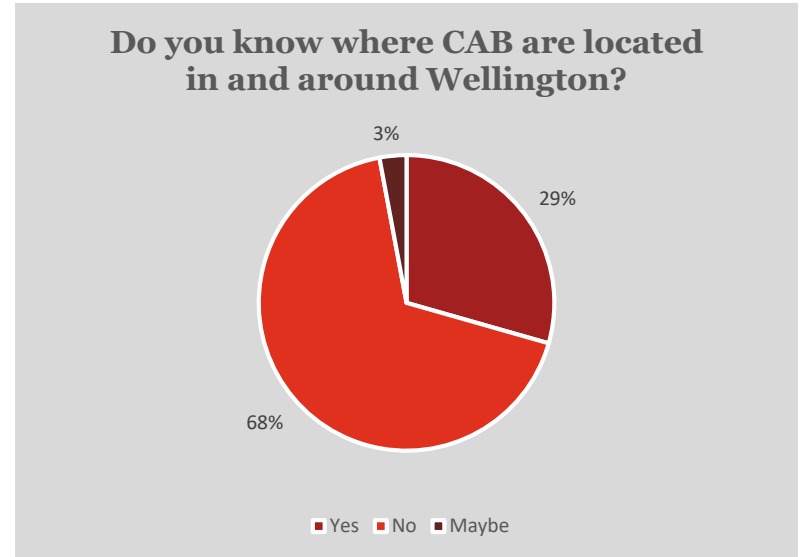
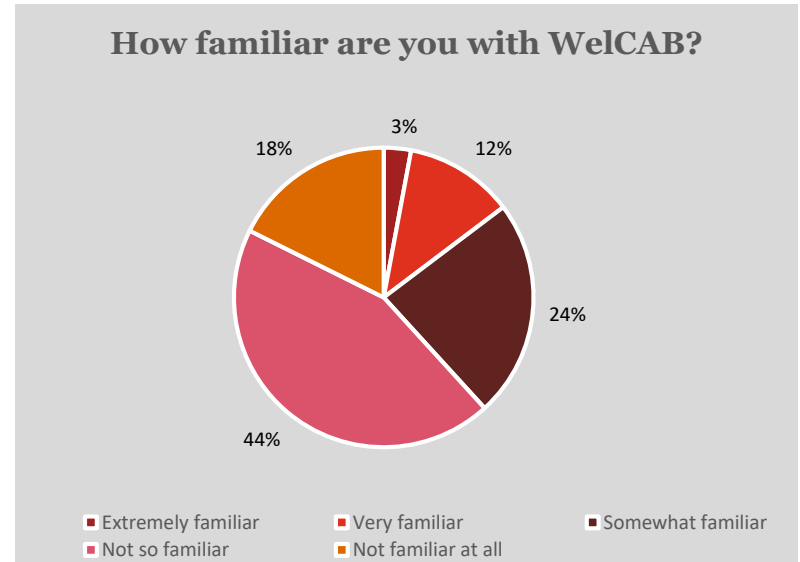
# Service and value proposition awareness

## *There is variable awareness and understanding as to WelCAB's service offering and value proposition*

While WelCAB boasts a strong value proposition to distinguish itself within the community service sector in Wellington, awareness for this value proposition is varied at present.

From our interviews, those familiar with WelCAB had a strong understanding of the service offering and value proposition. However, many interviewees had limited awareness. This was especially true of CAB's information and advocacy services.

To further test awareness, we conducted a brief survey with 34 PwC Wellington staff members. While we note that a group PwC staff members is not necessarily representative of the wider Wellington community – the survey results consistently demonstrated low levels of awareness. The majority of respondents cited being unfamiliar with WelCAB, unsure as to the location of WelCAB's branches, unable to recognise the CAB logo and under the impression that the primary service is the provision of free legal advice or JP services.





# Service volumes

## *The volume of client enquiries has steadily increased over the last 6 years, stretching existing funding levels*

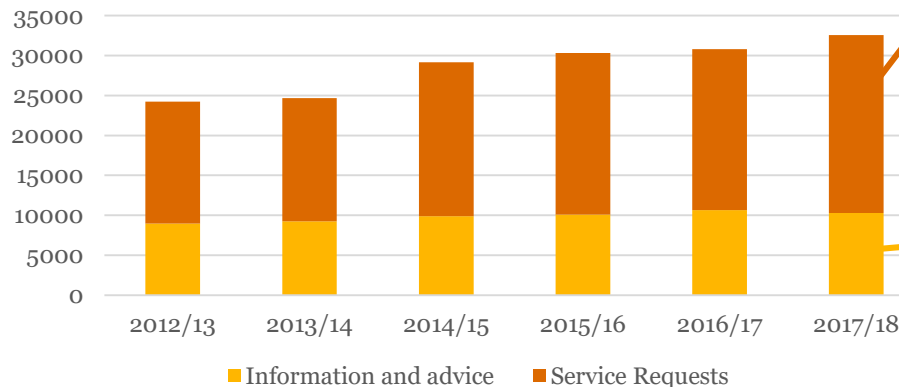
The graph below shows that the number of client enquiries has steadily increased over the past 6 years, despite funding levels remaining relatively stable over the same period. Since 2012/13, the total number of client enquiries has increased by ~46%, demonstrating that WelCAB is delivering more for less and having to stretch already limited resources to cover growing demands.

The graph also shows total number of client enquiries split by:

- **Information and advice services** – in depth interviews held with clients where they are offered information, advice and options based on research.
- **Service requests** – interactions with clients to provide information or access to services, but do not involve an interview or the provision of options.

The increase in client enquiries has been largely driven by greater demand for ‘service requests’. Of the ~8,000 additional client enquiries received in 2017/18 (as compared to 2012/13), ~90% of these were ‘service requests’.

Client enquiry volumes over time



### **Since 2012/13, service requests have grown by 46%**

*Service requests are quicker, higher volume enquiries that most commonly represent Justice of the Peace (JP) services. In recent years, all WelCAB branches have experienced growth in demand for JP services, and it is the primary driver for high service delivery volumes (as shown below).*

Year	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	% increase
Volume	15,277	15,438	19,279	20,266	20,159	22,283	46%

### **Since 2012/13, information and advice enquiries have grown by 15%, requiring significant additional effort from WelCAB**

*Information and advice enquiries take an average of 23 minutes to complete and experience lower volumes than service requests. WelCAB now receives 1,325 more enquiries per year than in 2012/13, which amounts to an additional ~500 hours of volunteer time (excluding enquiry write up etc.).*

Year	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	% increase
Volume	8,963	9,225	9,894	10,074	10,642	10,288	15%



# Service agility and responsiveness

## Data collected by WelCAB shows that peoples' needs change over time in accordance with current issues and events

The table below shows the top 5 growth areas for client enquiries between 2013/14 and 2017/18. During this time, WelCAB has experienced fluctuations in the types of issues experienced by clients. For example, in 2016/17 there was an increase of over 50% in the number of enquiries received concerning emergency housing. This has now reduced to the same level as five years ago.

Often rises and falls in client enquiries are associated with current issues and events. For example, the increase in New Zealand Government enquiries below is likely a result of the 2017 General Election and 2018 Census. The increase in Citizenship and Immigration enquiries is likely the result of Immigration NZ closing its Wellington visa processing branch in November 2017.

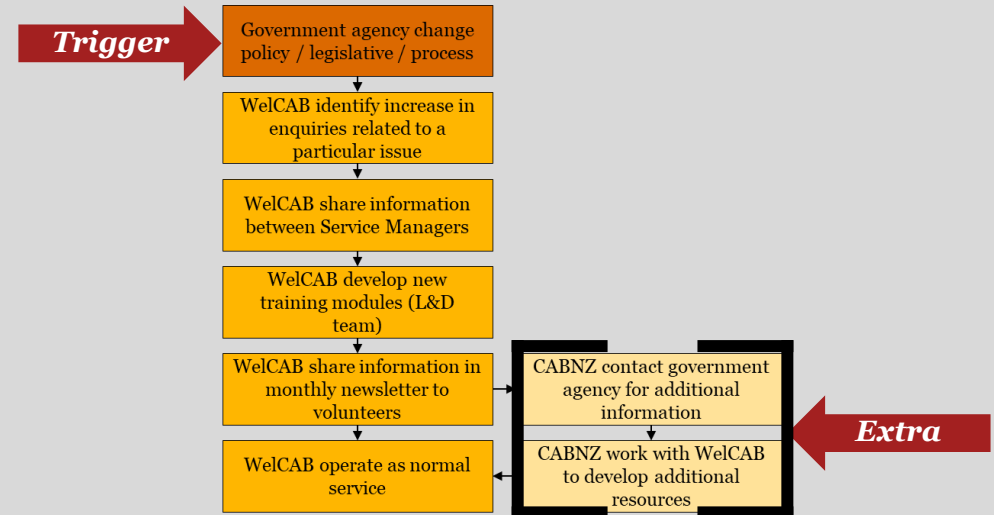
Top 5 growth areas				
	Nature of enquiry	2013/14	2017/18	% growth
1	New Zealand Government	67	138	106%
2	Citizenship and immigration	364	721	98%
3	Consumer financial matters	75	132	76%
4	Rights of the individual	163	259	59%
5	Business development	87	132	52%

## WelCAB has the capability to respond to changing client needs

WelCAB is well-placed to respond to changes in society, such as policy, legislative or process changes. Often government will implement changes that require adjustments by individuals. Changes may also have unforeseen / unintended consequences that have not been planned for.

WelCAB is able to provide support to individuals in response to changes by being adaptive to new / emerging client enquiries. It has built the capability to respond to new issues when they arise to be able to provide necessary support to clients in need. This means that no matter what the problem, clients can be assured that they have someone to turn to.

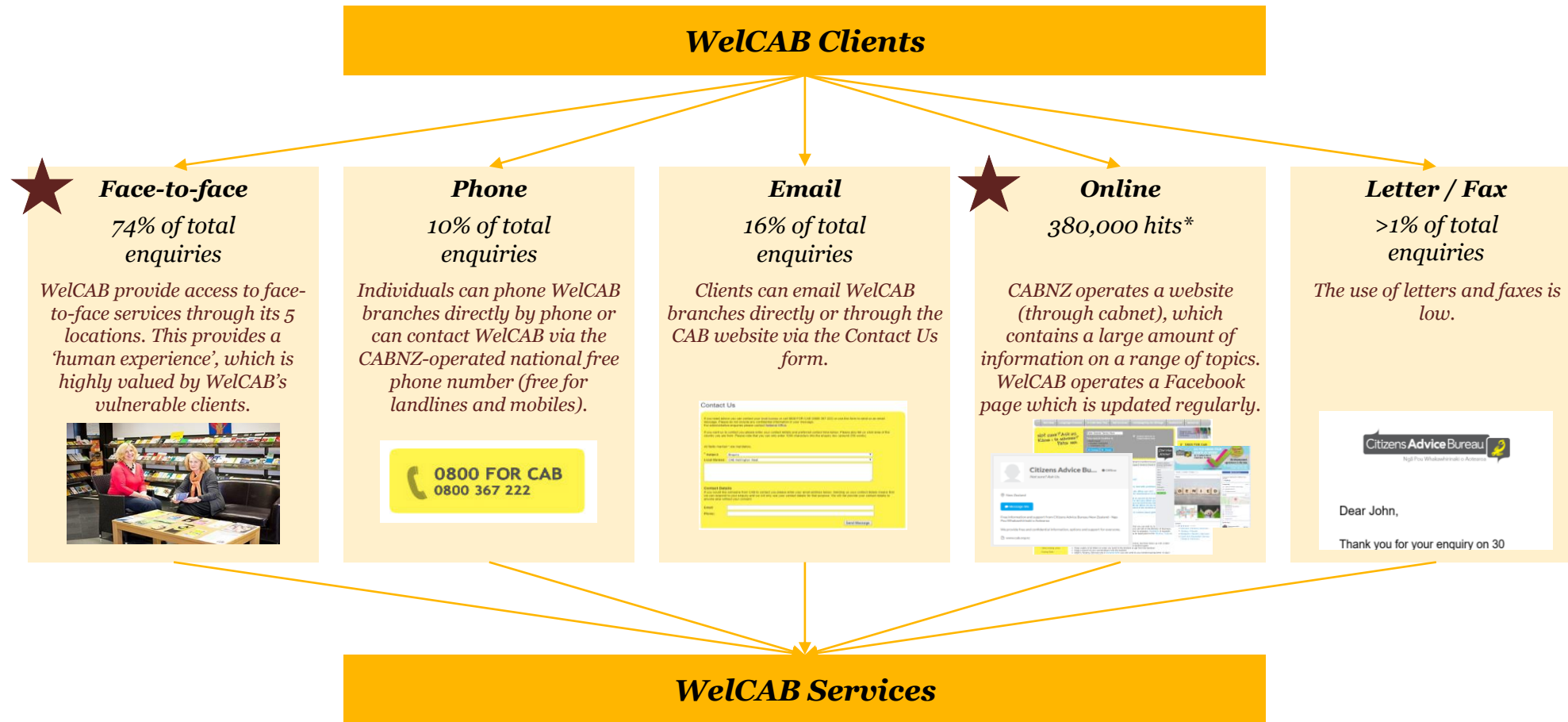
The typical process that WelCAB follows to build new volunteer capability and information resources is shown below.





# Service delivery channels

*WelCAB offer a multi-channel client experience to enable clients to access services in a range of different ways*



★ Explored in more detail on proceeding pages

\*CABNZ website hits from individuals in Wellington



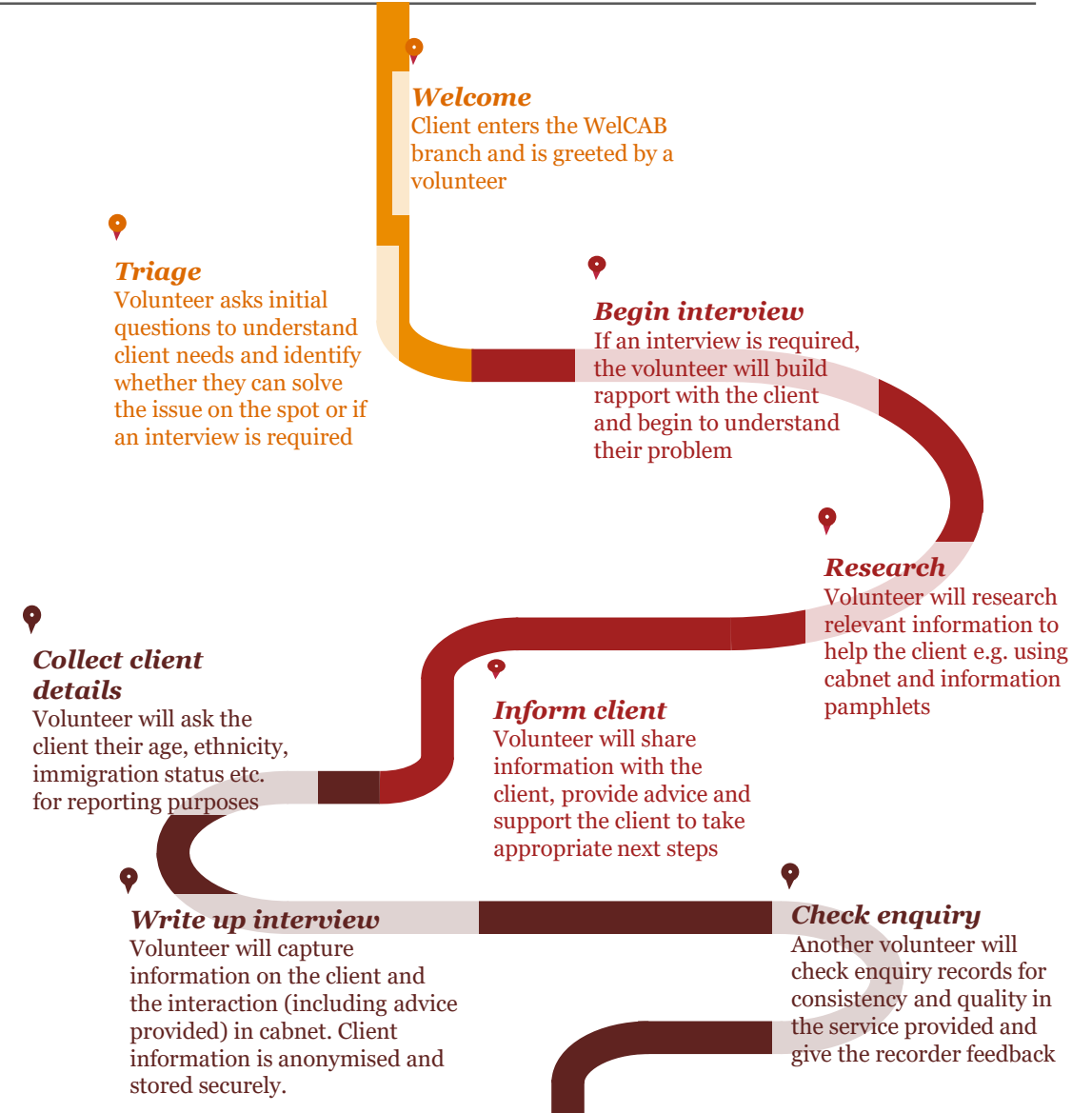
# Face-to-face client interaction

## *WelCAB is differentiated by its accessible, intensive and face-to-face support for the harder-to-serve*

With increasing use of digital service delivery channels, it is becoming more difficult for local and central government agencies to reach vulnerable and hard-to-serve communities and populations.

WelCAB offers a multi-channel experience that caters to a wide range of client needs, but it is the face-to-face channel that makes WelCAB uniquely placed to reach many communities and populations that other organisations struggle to interact with. WelCAB attracts individuals in need by offering free and non-time limited services with a real life “human” interaction. This personal customer experience allows WelCAB volunteers to provide a level of empathy, impartiality and anonymity that can be difficult to find elsewhere. It also provides reassurance to individuals that someone is there to help during moments of despair, when they have exhausted alternative options or do not know who to turn to.

WelCAB’s unique customer journey is shown to the right and demonstrates the thorough process WelCAB follow to put clients at ease, understand their unique needs and identify appropriate solutions to their problems. All volunteers are trained in how to deliver services in this way, making them well equipped to maintain high service levels and properly meet client needs.





# Online client interaction

## *The CABNZ website gives Wellingtonians access to extensive information at any time*

CABNZ operate the national website which is available for everyone across New Zealand to use. The website is an important and growing support tool for WelCAB, offering individuals the opportunity to access a wide range of information themselves.

In 2017/18, the CABNZ website received ~380,000 hits from individuals in Wellington. These hits came from ~145,000 unique users, which equates to over 10% of all website users.

The website provides an extensive range of information on:

- **Information about rights in common subject areas.** Individuals can search for information on common topics that are presented in question and answer format. There are over 2000 questions and answers based on real client enquiries that provide information related to a specific problem, including links to relevant websites.
- **Other community service providers.** Individuals can search the Community Directory to find organisations that deliver specific services near to them. This directory lists information on over 35,000 community organisations.
- **Individual bureaux.** Individuals can find out what bureau is closest to them, what services are available at each bureau and how to access their services.

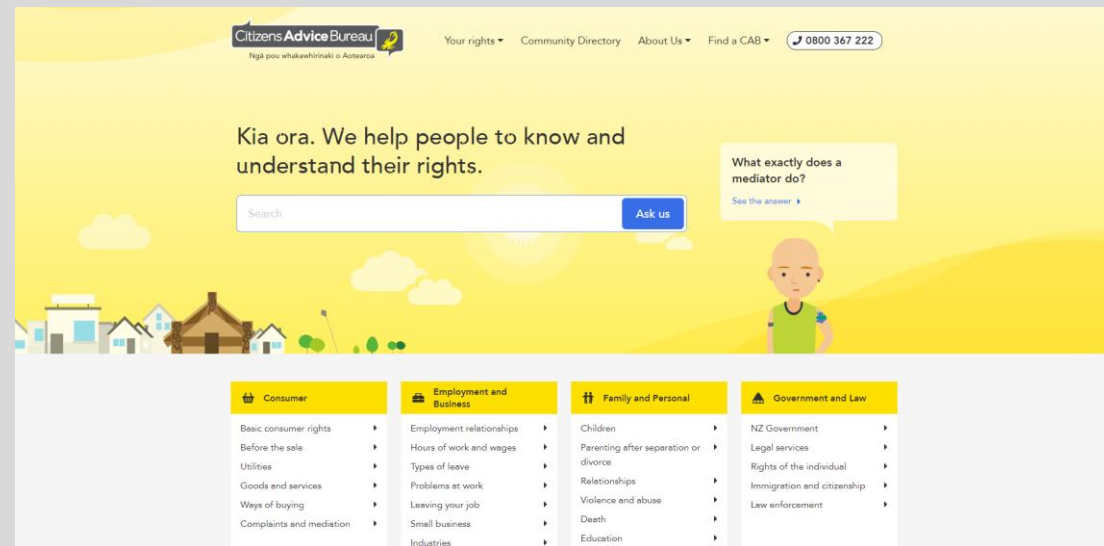
It also offers a live chat option (“Tawk”). This is operated by CAB volunteers during standard open hours and gives individuals the opportunity to ask direct questions in real time.

## *CABNZ Website Upgrade*

All CABs use a technology platform (cabnet) which is provided by the CABNZ national office. Cabnet has 3 components: a public-facing website, a CAB-facing intranet and an administration portal. Cabnet was launched in 2010.

CABNZ are currently undertaking a major project to upgrade cabnet, which is due to be completed in early 2019. As part of this upgrade, CABNZ is redesigning its website to make it more user-friendly and simpler to use.

The changes include a new look to the website and improved search functionality for information resources. It also includes quicker to find bureau location and contact details. An example of what the website might look like is shown below.





# Client demographics

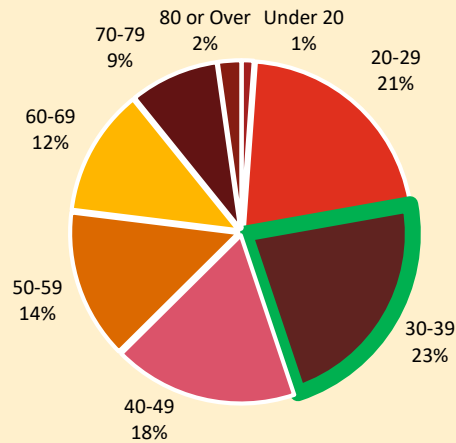
## WelCAB attracts a diverse range of individuals from the Wellington community

In 2017/18, WelCAB interacted with ~33,000 clients across all of its services. The demographics of these clients are shown below, demonstrating the variety of individuals that WelCAB interacts with and how the service is used by people from all walks of life. In particular, WelCAB attracts clients from a wide range of ethnic backgrounds.

### Snapshot of WelCAB's clients

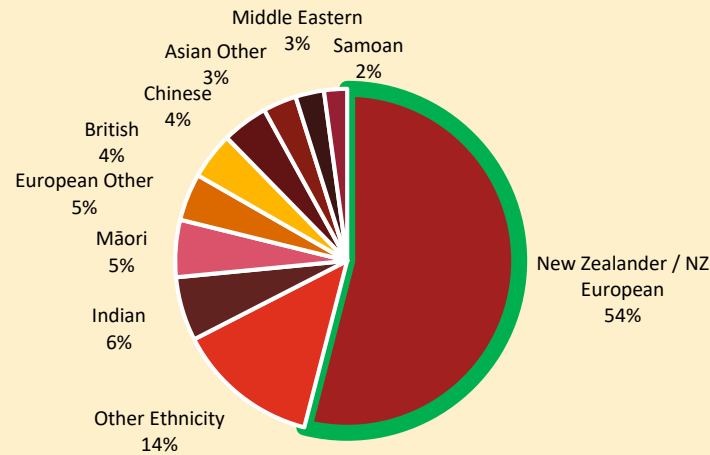
#### Age distribution of WelCAB clients

WelCAB has fairly even distribution across different age categories between 20–59 and the largest proportion of WelCAB clients are of working age.



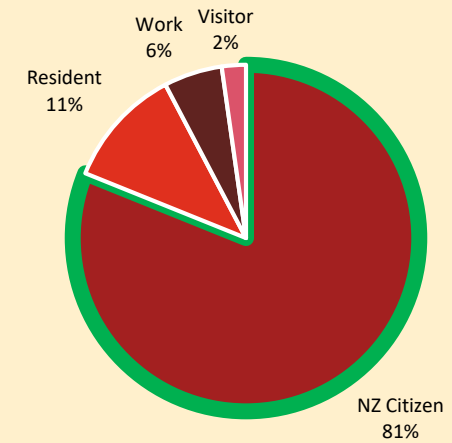
#### Ethnic diversity of WelCAB clients

WelCAB clients come from a diverse range of ethnic backgrounds (29 different ethnicities). From this range of ethnicities, the largest number of clients identify as New Zealanders or NZ Europeans.



#### Residential status of WelCAB clients\*

WelCAB clients are predominantly New Zealand citizens, however, ~20% of clients are on temporary or resident visas. Across all branches ~15% of clients have been in New Zealand for less than 3 years.



\*Only recorded for Settlement Support clients (4206 in total)





# WCC priority populations

## *A mismatch between WCC definitions and WelCAB data classifications limits WelCAB’s ability to demonstrate support for priority populations*

WCC’s identified priority populations include:



- Youth
- Refugees
- Social housing tenants
- Those living in areas of high deprivation

As shown by the table to the right, there is a mismatch between WelCAB data classification methods and WCC definitions for these priority populations (with the exception of ‘areas of high deprivation’). Although detailed client enquiry records clearly demonstrate that WelCAB is reaching WCC’s priority populations, this misalignment means that WelCAB cannot easily demonstrate the full extent of support / service coverage provided to these population groups.

While the available WelCAB data is incomplete, the proceeding pages present an assessment of how well WelCAB are currently reaching these priority populations.

### **WelCAB’s approach to data capture is determined by CABNZ**

Data capture conventions and parameters are determined and set by CABNZ. As such, WelCAB have limited ability to change these conventions / parameters. However, CABNZ have expressed an interest in collaborating closely with funders to ensure data conventions / parameters are able to better meet the data / information needs of funders. For example, WelCAB now provides statistics to WCC on clients living in Areas of deprivation on a two-monthly basis.

	WCC definition	WelCAB data fields	WCC and WelCAB data alignment?
Youth	14 – 24 year olds	Under 20 or 20 – 29 year olds	
Refugees	A person who has been forced to flee their country because of violence or persecution	Ethnicity, length of time in NZ, residence status	Partially aligned
Social housing tenants	People living in affordable rental housing due to low income and assets and face barriers to other types of housing	Category for “Social Housing (e.g. state houses) incl disputes” and social housing captured in enquiry description	Partially aligned
Areas of high deprivation	People living in areas of high deprivation – particularly Linden and Strathmore	People living in areas of high deprivation – particularly Linden and Strathmore	



# Youth

## What do we know about youth in Wellington?

### Youth population in Wellington

Youth are people aged 14-24\*. There are currently 36,500 youth in Wellington, which represents ~17.6% of the total population\*\*. The youth population is largely made up of individuals in tertiary education and young workers.

### WCC initiatives / goals related to youth

The council predominantly supports youth by funding youth-focused organisations and services, and providing a voice for young people through the Youth Council. In the Council's Long Term Plan, there are also targets specific to youth. These include decreasing youth NEET (not in education, employment or training) and increasing youth participation in sport.

### Characteristics of vulnerable youth

Youth often lack experience and skills in relation to their rights and duties. They may have limited power, especially in employment relationships where they hold entry level positions. They tend to have limited funds to pay for advice or meet financial obligations and are newly living independently.

## How do WelCAB currently support youth?

### Reach

In 2017/18, 1,207 individuals aged 29 or below used WelCAB's services. This represents ~22% of all phone and face-to-face information and advice requests (where age was recorded). The highest proportion of these clients visited the CBD branch (28%).



It is likely that interaction with youth clients is higher, as a significant number of youth in Wellington go directly to the CABNZ website to source information for themselves (given that youth prefer to use digital channels).

### Types of enquiries

Youth commonly seek information and advice on housing (e.g. flatting issues, ending a tenancy, dealing with landlords); employment (e.g. employee relationships, being paid, workplace bullying or harassment); and consumer rights (e.g. in relation to faulty goods, contractual rights as a consumer, returning goods). They are also increasingly seeking advice in relation to citizenship and immigration. These issues are consistent with the common points of vulnerability for youth.

### Gaps

- **Data capture:** WelCAB are currently unable to fully quantify the number of youth that it interacts with due to the nature and quality of information that it collects at present. A significant portion of client enquiry records (~25%) do not record client age, and WelCAB's definition of youth does not align with WCC's (under 20 or 20-29 as opposed to 14-24). This means that actual youth reach is likely to be higher.
- **Reach:** Based on figures available, WelCAB reach a maximum of ~3% of the youth population in Wellington. This represents a significant number of young people that are not aware of or accessing WelCAB's services.
- **Tailoring services to youth preferences:** With the exception of delivering education sessions in colleges and tertiary education organisations, WelCAB does not tailor its service delivery channels or approach to specifically target or appeal to youth.

\*Youth Engagement Framework (2018), Wellington City Youth Council

\*\*Stats NZ 2016 Population Estimates



# Refugees

## What do we know about refugees in Wellington?

### Refugee population in Wellington

Refugees are people who have been forced to flee their country because of persecution, war or violence. Wellington is the largest refugee settlement area in New Zealand (out of 8 areas). Since 2008/9, over 2,000 refugees have been resettled in the city from 26 different nationalities\*.

### WCC initiatives / goals related to refugees

The council provide support to refugees through social housing by giving them automatic eligibility. It also provides grants to organisations that support refugees e.g. Nisa Clothing. As part of the Resilience Strategy, WCC aims to develop sustainable food networks that can help refugees integrate into the community.

### Characteristics of vulnerable refugees

Refugees are highly vulnerable by nature. They have often experienced very traumatic events before arriving in New Zealand and have challenges settling into a new way of life. They often lack confidence due to not speaking English as their first language; have limited experience using phones / computers; suffer from mental illness or trauma; and have low literacy in their own language.

\*Refugee Quota Branch (Immigration New Zealand) Resettlement Statistics

## How do WelCAB currently support refugees?

### Reach

WelCAB connects with almost every refugee that arrives in Wellington by collaborating with the Red Cross. WelCAB presents at refugee orientation sessions and provides information to help refugees access its services. Upon exiting the Red Cross programme (after ~12 months), WelCAB provide a critical ‘safety net’ for refugees as no other organisations offer a comparable service on an ongoing basis.

Between 2015/16 and 2017/18, all but one of the 26 refugee nationalities were represented in WelCAB’s client enquiry records.

WelCAB received a greater number of non-New Zealand client enquiries than the total number of refugees that arrived in Wellington for all refugee nationalities apart from Middle Eastern. This suggests that WelCAB has good coverage within the refugee population, with the exception of those from the Middle East.

Ethnicity	# of refugee arrivals	# of WelCAB enquiries
Middle Eastern	496	152
Chinese	0	655
Central / South American	97	200
African / African Other	5	323
Asian Other	110	453
Russian	1	64
Somali	4	125

### Types of enquiries

Refugees commonly seek support in reading and writing letters (e.g. related to Work and Income, IRD); certifying documents; advocacy and referral (especially with government agencies); consumer rights (e.g. contracts); social housing; citizenship and immigration; and finance (e.g. loan sharks, low finances, budgeting). Often refugee clients require support for a multiple issues and general support with personal administration.

### Gaps

- **Data capture:** WelCAB volunteers are not required to record refugee status in client enquiry records (although it is sometimes included in the detailed write up).
- **Range of languages:** Through Language Connect and WelCAB volunteers, WelCAB provides refugee language and interpretation services. However, this service does not cover all languages spoken by refugees.
- **Middle Eastern refugees:** Middle Eastern refugees are under-represented in WelCAB’s client interactions. This is the largest refugee background and presents a gap in WelCAB’s reach amongst refugee populations.



# Social Housing Tenants

## What do we know about social housing tenants in Wellington?

### Social housing population in Wellington

Social housing tenants are people who live in accommodation aimed at those with low incomes and / or special housing needs. There are currently over ~3,000\* homes housing ~7,500 people in Wellington (and there are another ~350 applicants on the Social Housing Register\*\*).

### WCC initiatives / goals related to social housing

WCC is Wellington's largest provider of affordable rental housing. The Council own ~2,200 units in over 40 locations across Wellington city that collectively house ~4,000 people. One of the Council's priorities in its Long Term Plan relates to housing – to enable people to have good housing choices. This includes providing adequate supported living / social housing.

### Characteristics of vulnerable social housing tenants

The criteria used to assess social housing eligibility refers to levels of vulnerability, e.g. low income and assets and without adequate housing. Social housing tenants often experience language barriers and literacy issues; financial difficulties; health issues; and relationship problems.

\*Stats NZ, Census of Population and Dwellings 2013 data

\*\*Wellington City Housing Register September 2018

## How do WelCAB currently support social housing tenants?



### Reach

Enquiries relating to housing and land account for ~15% of all WelCAB's client enquiries. The most commonly raised matter is rental housing – in particular, residential tenancy disputes. WelCAB client enquiry records show that many of the housing / land enquiries relate to social housing in Wellington (however, this can not be accurately quantified as WelCAB volunteers are not required to record housing status).

### Types of enquiries

Social housing tenants often seek support relating to changes in rental rates; dealing with landlords (e.g. in relation to damage, wear and tear); reviewing social housing eligibility; and paying rent. They often seek independent advice to understand their rights prior to approaching their landlord.

### Gaps

- **Reach:** WelCAB responded to a total of 1,500 housing and land enquiries in 2017/18 – which means a maximum possible reach of 20% of all Wellington social housing tenants. It is likely the reach is in fact lower as a portion of these housing and land enquiries would have related to non-social housing issues.
- **Data capture:** WelCAB volunteers are not required to record housing status in client enquiry records (although it is sometimes included in the detailed write up).
- **Collaboration with social housing organisations:** While WelCAB does engage with WCC and Housing NZ – this engagement tends to be limited and prompted by WCC / Housing NZ. To date, opportunities for future engagement / partnership have not yet progressed beyond the idea stage.



# WelCAB service user stories

*I was homeless and desperate for help. I went to WelCAB for advice on how to put together a basic CV after talking to a shop about possible part-time work. WelCAB walked me through the types of things that would normally go into a CV, showed me a CV builder online and helped work me through it. They printed some copies of my CV and gave me guidance about options for references.*



*I went to WelCAB for assistance with a WCC social housing issue. I had been notified that my rent would rise on the basis that my husband had employment and that we would no longer be eligible for the Council subsidy. My husband and I had recently separated and it was just me and my children living in our flat. I had no income other than a WINZ benefit. I was in arrears with my rent after my husband left and my WINZ payments were out of sync with rent payments. WelCAB contacted WCC City Housing on my behalf and told them of my change in circumstances. City Housing confirmed that I would not face an increase in rent and they would send me a letter to confirm this in writing. They also confirmed that I was not in arrears.*



*I am a former refugee and was referred to WelCAB by Community Law. I was orphaned when my parents were killed in conflicts back in my home country. I now live in New Zealand with one of my older siblings but have another sibling in my home country and am very concerned for her well-being. I went to the Red Cross and Community Law for information but needed help filling in immigration application forms. WelCAB listened to my worries and story then assisted me to fill in the immigration forms.*





# Locations

## *The Central Wellington branch responds to more than half of WelCAB’s total client enquiries*

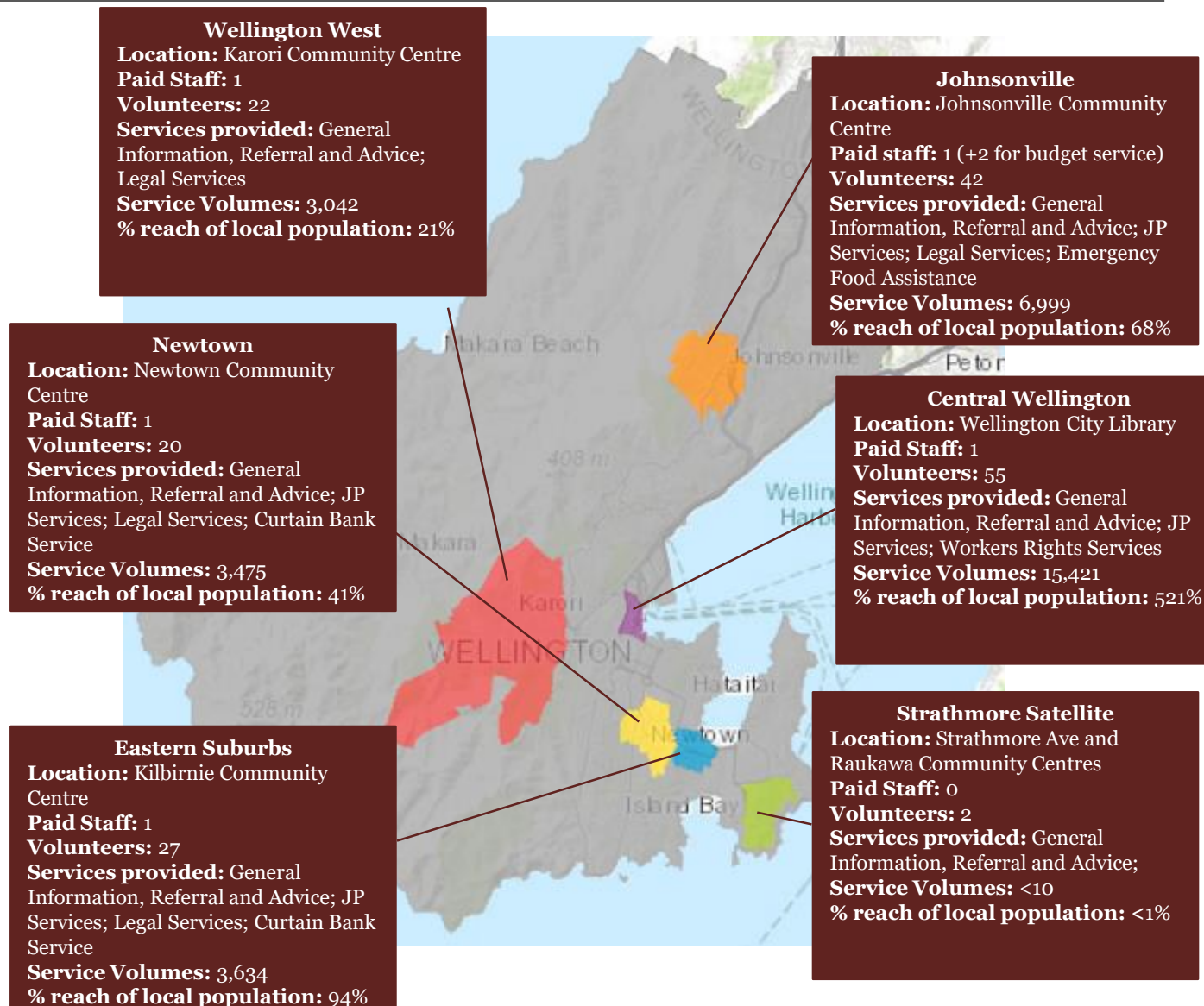
WelCAB operates 5 permanent branches and 1 satellite service. In 2017/18 WelCAB received over 32,000 client enquiries, which suggests a reach of up to 15% of Wellington’s population.

The Central Wellington branch is the most frequented and responds to more than half of WelCAB’s total client enquiries. This is largely due to the accessible central location in the Wellington City Library.

The other 4 permanent branches vary in how effectively they reach their local populations. For example, the Eastern Suburbs branch receive client enquiries that represent up to 94% of the total Kilbirnie population – indicating a strong local presence in the community. However, the Wellington West branch receive client enquiries that represent 21% of the total Karori population – indicating a weaker presence in the local community. Collectively they offer good coverage across Wellington city.

## *The Strathmore satellite service has not been successful to date*

In March 2018, WelCAB established an outreach service in Strathmore Park to respond to WCC’s request to support individuals living in areas of high deprivation. To date, this service has not generated material uptake – with less than 10 clients accessing the service during its 6 months of operation. The reasons contributing to this low uptake include: limited service availability; limited locations; a lack of understanding of local community preferences; low levels of awareness and promotion; and limited access to supporting office equipment.



\*Population data source: Wellington Community Profile created by .id (based on 2013, 2006 and 2001 Censuses of Population and Dwellings and more recent Stats NZ population estimates)



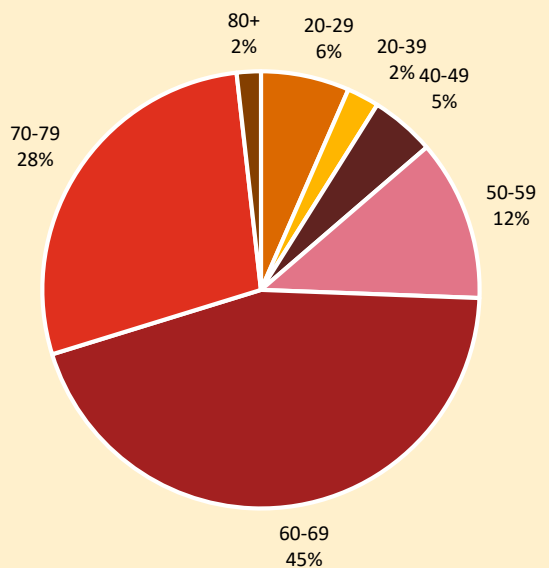
# Volunteer demographics

## *WelCAB has a large volunteer workforce that is predominantly Pākehā and >60 years old*

WelCAB has a frontline workforce of ~160 volunteers, which amount to approximately 12 FTE. WelCAB would be unable to operate without the time and commitment given by these volunteers (over 28,000 hours per annum in total). A snapshot of the demographics of WelCAB’s volunteers is presented below.

### *Snapshot of WelCAB’s volunteer workforce*

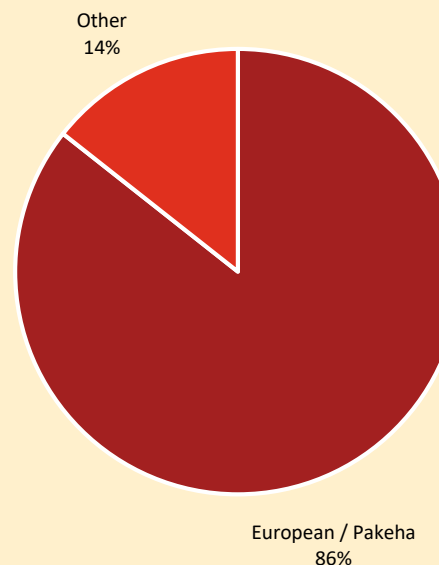
**Age distribution of volunteers**



WelCAB volunteers are predominantly older, with almost half of all volunteers being in the 60-69 age group. Whilst this may indicate a lack of age diversity within the WelCAB volunteer workforce, it is consistent with research that indicates that 65-75 year olds are the most active age group for volunteering in New Zealand\*.

WelCAB has low representation of young people in its volunteer workforce – with only 11 volunteers aged under 29 (9 of whom work in the Wellington Central branch).

**Ethnic diversity of volunteers**



WelCAB volunteers are predominantly European / Pākehā, which is largely consistent with the ethnic demographics of the Wellington population, where 73% of people identify as European / Pākehā\*\*.

WelCAB boasts a wide range of ethnicities in its volunteer group (11 in total), however they are under-represented in the overall workforce.

\*Stats NZ, *Volunteering and Donations by New Zealanders in 2016*

\*\*Population data from 2013 Census



# Volunteer skills and roles

## WelCAB has a highly skilled volunteer workforce

WelCAB chooses volunteers with diverse professional and ethnic backgrounds and invests significant effort in training and upskilling. It requires volunteers to go through induction, probation and specific training in their first year – as well as 14-30 hours of compulsory training for each year following. The combination of these factors result in a highly skilled volunteer workforce able to deliver high quality services – something that other charitable organisations struggle to replicate.

### WelCAB volunteers speak a wide variety of languages

The WelCAB volunteers speak 21 different languages. This makes the volunteer workforce more culturally sensitive and able to help clients who do not speak English as their first language. WelCAB records the details and locations of all volunteers who have a special language capability so that clients can be referred to them when they need to access services in a specific language.

Spanish	Samoan	Dutch	German	
	Mandarin	Khmer	Italian	Afrikaans
Cantonese	Te Reo	Irish	Hindi	
	French	Urdu	Gujurati	Bengali
Dutch	Malaysian	Punjabi	Sindhi	

### WelCAB volunteers have diverse skills and knowledge

WelCAB volunteers come from a wide range of working backgrounds (see below). This is one of the benefits of having an older volunteer workforce, as it is largely composed of highly skilled retired individuals.

Teacher	Lawyer	Researcher	Pilot	
	Social worker	Journalist	Nurse	Counsellor
Admin	Taxi owner	Psychologist	Interpreter	
Probation officer	Communications adviser	Management consultant	Policy analyst	

## WelCAB volunteers predominantly deliver client-facing services, but also support ongoing operations

The majority of WelCAB volunteers are frontline staff who deliver WelCAB’s general information, advice and referral service (as an ‘Accredited Volunteer Bureau Interviewer’). The purpose of this role is to conduct client interviews and access cabinet to provide client’s with appropriate information, advice and support (according to the CABNZ model). Some volunteers also deliver specialist information and advice services (e.g. special advisors on consumer rights, law, finance or employment).

Some volunteers provide operational support (e.g. Mentors, Learning and Development Facilitators, Information Officers) and / or hold governance roles (e.g. Chairperson, Treasurer, Secretary, Member). WelCAB relies heavily on these volunteers to help managers run the organisation and provide strategic oversight.

Outside of the roles above, there are limited opportunities for individuals to apply their broader skillsets within WelCAB. WelCAB do not fully leverage the volunteer workforce to fill capability and capacity gaps (as identified below) that exist in the paid workforce by making the most of the wide range professional backgrounds / experience of volunteers.

Current capability / capacity gap	Relevant skills available in volunteer workforce?
Marketing and communications	✓ - Communications Adviser, Editor, Journalist, Web Development
Fundraising	✓ - Sales
Relationship management	? – Likely hold relevant relationships with individuals that could be leveraged
Data analysis	✓ - Policy Analyst / Development, Statistician, Researcher





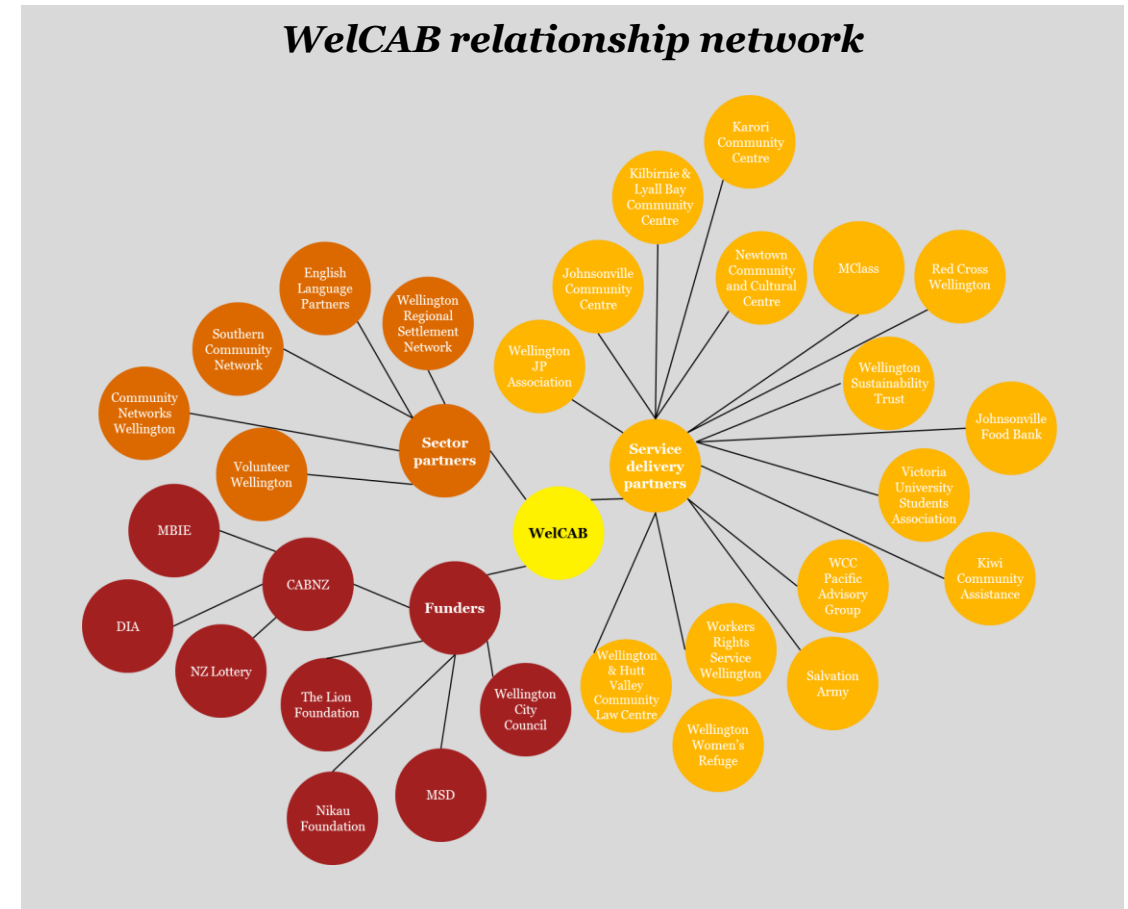
# Relationship network

**WelCAB is well connected with other community service organisations and holds a wide range of informal relationships**

WelCAB’s relationship network primarily comprises 29 relationships, as depicted in the diagram to the right. The nature of these relationships cover 3 broad categories:

1. **Service delivery partners** – WelCAB works with these organisations to deliver its own services or allow others to provide services out of WelCAB branches e.g. by sharing premises.
2. **Sector partners** – WelCAB works with these organisations as part of a broader community services / not-for-profit sector to upskill its volunteers; provide advice / support; and contribute towards the sector e.g. by attending meetings and organising award ceremonies / events.
3. **Funders** – WelCAB receives funding from these organisations to deliver services to individuals in the Wellington community (note: more detail on WelCAB’s funding relationships is covered on pages 80-84).

WelCAB also holds a number of additional informal relationships, largely with other community service organisations in Wellington. Through these connections, WelCAB plays an important coordination role by giving and receiving referrals to ensure clients are able to satisfy their needs and access appropriate services. WelCAB also maintains a Community Directory (available on the CABNZ website) which provides details on all of the community service organisations in Wellington.





# Relationship gaps

## ***WelCAB holds limited relationships with organisations outside the community services / not-for-profit sector***

The majority of WelCAB’s existing relationships are with similar community / not-for-profit organisations. This has created a close network of aligned organisations and enables WelCAB to quickly and easily identify appropriate organisations to refer clients to. However, there are gaps in WelCAB’s relationship network outside of this sector. These gaps limit WelCAB’s ability to access new clients and resources by collaborating with different types of organisations. Specific gaps in WelCAB’s existing relationship network include:

### ***Data and information sharing arrangements***

WelCAB has limited formal data / information sharing arrangements with other organisations. Existing arrangements exist to share information on specific topics e.g. where one organisation provides training to the other.

This represents a missed opportunity to share data for greater insight.

### ***Central government***

WelCAB often helps its clients to navigate government services but, beyond contractual funding arrangements, does not tend to hold strong strategic relationships with central government agencies themselves.

This represents a missed opportunity to collaborate with central government agencies to better support individuals to interact effectively with government services; ensure the quality and accuracy of WelCAB’s advice; and provide a feedback loop to improve policy development / service delivery.

### ***Private organisations***

WelCAB has no relationships with private organisations e.g. local businesses. This is partly due to the limitations of being attached to a wider national organisation (where major partnerships are arranged at a national level).

This represents a missed opportunity to explore collaborative arrangements with local private organisations (that align with WelCAB’s purpose) to provide access to specialist capabilities, technology and publicity.

### ***Priority population service providers***

WelCAB has limited relationships with organisations that already provide services to the WCC priority population groups (such as Red Cross, Victoria University Students Association).

This represents a missed opportunity to increase WelCAB’s coverage of these populations – but also to explore joint or integrated service delivery options / channels.



# D. Service user future opportunities

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# Service user observations and opportunities

CURRENT STRENGTHS	CURRENT GAPS	OPPORTUNITY
<p>WelCAB offers a high quality, low cost information, advice and support service that is growing in demand</p>	<p>There is variable external awareness and understanding as to WelCAB’s value proposition and key points of differentiation</p>	<p>1. There is an opportunity to increase awareness and understanding of WelCAB’s service offering and value proposition</p>
<p>WelCAB has a unique value proposition and is differentiated by its accessible, intensive, face-to-face support for the harder-to-serve</p>		
<p>WelCAB use a range of different service delivery channels to attract a diverse range of clients – including those from WCC priority population groups</p>	<p>There is scope to use different service delivery channels and approaches to better reach WCC target populations</p>	<p>2. There is an opportunity to better reach and support WCC target populations in Wellington through alternative service delivery methods and greater collaboration</p>
<p>WelCAB collaborate with a number of other community service organisations</p>	<p>There is scope for WelCAB to collaborate more widely to better reach WCC target populations</p>	
<p>WelCAB has a highly skilled volunteer workforce</p>	<p>There is scope to further leverage the volunteer workforce to fill capacity and capability gaps in WelCAB’s paid workforce</p>	<p>3. There is an opportunity to broaden recruitment and involvement of the community to fill capability and capacity gaps (e.g. fundraising, communications, marketing, data and analytics)</p>



# Service user opportunities and benefits

OPPORTUNITY	BENEFITS						
	Greater alignment with WCC priorities	Increased financial sustainability	Stronger relationship with WCC	Increased collaboration	Increased use of data and information	Increased adaptability to change	Services better aligned with customer needs
<p>1. There is an opportunity to increase awareness and understanding of WelCAB’s service offering – and further enhance its value proposition</p>		✓	✓	✓		✓	
<p>2. There is an opportunity to better reach and support WCC priority populations in Wellington through alternative service delivery methods and greater collaboration</p>	✓		✓	✓		✓	✓
<p>3. There is an opportunity to broaden recruitment and involvement of the community to fill capability and capacity gaps (e.g. fundraising, communications, marketing, data and analytics).</p>		✓	✓	✓	✓	✓	



# Opportunity 1: Value Proposition

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*There is an opportunity to increase awareness and understanding of WelCAB's service offering and value proposition*



# How does WelCAB need to respond to low levels of awareness?

*There is an opportunity to increase awareness and understanding of WelCAB's service offering and value proposition*

**There is variable external awareness and understanding as to WelCAB's value proposition and key points of differentiation**

## *Keep doing...*

- Continue to maintain the strong value proposition to service users
- Continue offering a high quality, low cost information, advice and support service across a broad range of topics
- Continue offering accessible, intensive, face-to-face services to the the harder-to-serve
- Continue to adapt to changing client enquiries through volunteer training and information resources
- Continue to provide a variety of service delivery channels
- Continue the existing program of work to upgrade cabinet

## *Do differently in the short term...*

- Develop a set of reusable communication materials (on WelCAB's service and value proposition) and share these on an on-going basis across multiple channels
- Enhance WelCAB's face-to-face service by improving volunteer capability and confidence in the use and navigation of technology and the 'digital environment'

## *Do differently in the long term...*

- Develop a communications and marketing strategy and actionable plan to increase awareness and uptake of WelCAB's services in the long-term
- Develop strategic relationships with local and central government to improve WelCAB's service agility and responsiveness (i.e. to enable anticipation and preparation to respond to planned changes that will impact society)



# How can WelCAB build awareness in the short term?

## Develop reusable communication materials and share these on an on-going basis across multiple channels

WelCAB can share its unique value proposition to raise awareness for its services and demonstrate what it has to offer the Wellington community. To do this, it should develop a number of different communications resources (e.g. infographics, videos and client stories) that bring the value proposition to life – then share these materials on an ongoing basis across multiple channels that can target WCC priority populations (e.g. sponsored Facebook ads, 1-on-1 engagement in communities, emails and local newspapers).







# How can WelCAB further enhance the face-to-face experience?

## Enhance WelCAB's face-to-face service by improving volunteer capability and confidence in the use and navigation of technology and the 'digital environment'

Human interaction matters – and the majority of consumers say that they want more of it in the future\*. Even as technology improves and automation becomes more prevalent, most consumers still prefer human interaction. People engage with apps, self-service checkouts, websites etc. but as soon as something goes wrong they want to talk to a real person. This is good news for WelCAB who already offer a highly valued face-to-face customer experience.



**Percent who indicate:**  
"I'll want to interact with a real person more as technology improves"

Research also shows that, whilst human interaction is important, the things that matter most to consumers are speed, convenience, knowledgeable help and friendly service.

In order to provide the best face-to-face experience, WelCAB need to provide training to improve volunteer capability and confidence in the use and navigation of technology and the digital environment (such as effective and fast navigation of the internet, ability to use apps and mobile phones etc.).

\*Experience is everything: Here's how to get it right, PwC Consumer Intelligence Series (2018)

## Ways to further enhance face-to-face service by improving digital capability and confidence of volunteers

### Use of paper pamphlets as reference material



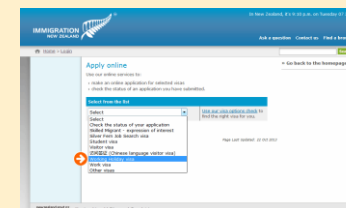
### Use of computers as a point of reference



### Helping people complete paper applications



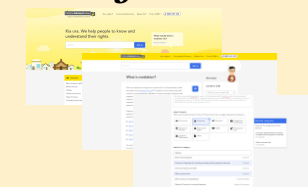
### Helping people complete online applications



### Face-to-face support



### Use of upgraded cabinet during interviews





# How can WelCAB increase awareness in the future?

## *Deliver a communications and marketing strategy and plan to increase uptake of WelCAB services*

WelCAB should develop a long-term communications and marketing strategy and an actionable plan to increase awareness of its service offering and value proposition.

WelCAB already has a lot of the information available to complete a marketing strategy, however, translating this into a plan would require making a number of trade off decisions about how much effort can be focused on marketing and where best to direct limited resources.

### ***Communications and Marketing Strategy***

A communications and marketing strategy explains **what** needs to be achieved through communication and marketing activities. It should be strongly aligned with organisational strategy / priorities and demonstrate how communication / marketing activities will contribute towards their achievement.

#### ***Contents***

- Situation analysis (e.g. SWOT)
- Value proposition and service offering
- Target customers
- Long term goals and objectives



### ***Communications and Marketing Plan***

A communications and marketing plan describes **how** the communication / marketing goals will be achieved by outlining the activities required to achieve them. It should convert the strategy into action – with a clear description of what will happen and when.

#### ***Contents***

- Executive summary
- Challenge / opportunity
- Short term goals and objectives
- Activities required to achieve goals and objectives
- Success measures
- Schedule / roadmap of activities
- Budget and resources



# How can WelCAB improve service agility and responsiveness?

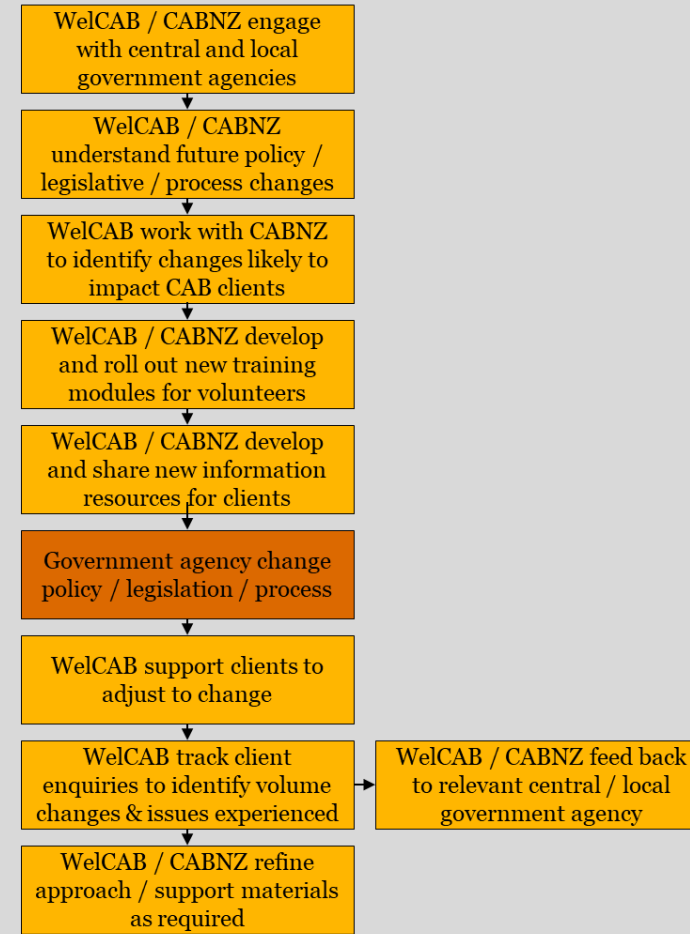
## ***Develop strong strategic relationships with local and central government to improve WelCAB's service agility and responsiveness***

In order to maintain the agility, relevance and responsiveness of its services, WelCAB and CABNZ should develop and retain strong strategic relationships with local and central government (where WelCAB focus on local relationships and CABNZ focus on national relationships). Once this has been achieved, it will also be important to establish a new process for proactively engaging with government before 'change events' occur so that WelCAB / CABNZ have the opportunity to build volunteer capability before new client enquiries present (refer to the process presented to the right).

Building these relationships and new processes will be particularly relevant to respond to the NZ Digital Government Transformation Programme, which is moving many government services online.

One specific emerging opportunity would be to work with the Inland Revenue Department (who CABNZ already hold a relationship with) to deliver its Business Transformation Programme. This programme will modernise the tax system, which includes moving tax services online. A number of significant changes are scheduled for implementation in April 2019 that will have a considerable impact on many New Zealanders. Given the fact that CABNZ experiences ~5,000 tax-related enquiries per year, it is likely that these changes will also affect WelCAB / CABNZ clients. WelCAB / CABNZ could start engaging with IRD now to identify what the changes are; who they will impact and how; and then prepare in advance for these changes.

## ***Renewed process for building new capability***





## Opportunity 2: Priority Populations

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*There is an opportunity to better reach and support WCC target populations in Wellington through alternative service delivery methods and greater collaboration*



# What needs to change?

***There is an opportunity to better reach and support WCC target populations in Wellington through alternative service delivery methods and greater collaboration***

## *Keep doing...*

## *Do differently in the short term...*

## *Do differently in the long term...*

**There is scope to use different service delivery channels and approaches to better reach WCC target populations**

- Continue to offer a high quality information, advice and referral service
- Maintain existing reach and interactions with priority population groups
- Maintain existing relationships with community service providers serving target populations
- Emphasise importance of accurate and complete data capture by volunteers and continue to improve volunteer practices

- To align with WCC’s (and the wider social sector’s) current and future definitions of priority populations – work with CABNZ to adjust and introduce future flexibility / agility into data definitions
- Develop information materials relevant to youth and share proactively through existing service delivery channels
- Identify and use digital applications that could support real time language translation
- Establish drop in sessions at social housing complexes in Wellington
- Address existing challenges with the Strathmore satellite service by adopting more effective outreach methods

- Explore new engagement methods for youth – with a focus on digital channels
- Provide more holistic support to refugee clients based on refugee resettlement outcomes
- Target schools and universities to proactively share information and provide ‘on-the-spot’ support
- Explore opportunities to extend WelCAB’s existing ‘hub’ model by integrating with other new community service providers e.g. Tawa and Linden Plunket Clinics, Berhampore Community Centre

**There is scope for WelCAB to collaborate more widely to better reach WCC target populations**



# How can WelCAB better demonstrate its support for WCC priority population groups?

## *Adjust data collection classifications to align with WCC and wider health sector definitions...*

WelCAB should work with CABNZ to adjust current data collection classifications / definitions in cabinet to enable meaningful reporting on WCC (and wider health and social sector) priority population groups. Some suggested amendments are detailed below.

WelCAB / CABNZ should also look to build flexibility into cabinet to allow data classifications / definitions to be amended over time and ‘future proof’ the system.

	WCC definition	WelCAB data available	Adjustments required
Youth	14 – 24 year olds	Under 20 or 20 – 29 year olds	<ul style="list-style-type: none"> <li>• Add additional category for 14-24</li> </ul>
Refugees	A person who has been forced to flee their country because of violence or persecution	Ethnicity Length of time in NZ Residence status	<ul style="list-style-type: none"> <li>• Add additional category for refugee status</li> <li>• Record detail of ethnicity beyond “Middle East”, African etc.</li> </ul>
Social housing tenants	People living in affordable rental housing due to low income and assets and face barriers to other types of housing	“Social Housing (e.g. state houses) incl disputes” categories Social housing captured in enquiry description	<ul style="list-style-type: none"> <li>• Add additional category for social housing tenant status</li> </ul>

## *...and continue to improve volunteer practices to ensure accurate capture of information*

WelCAB has already recognised the need to improve volunteer practices to address existing data gaps arising from volunteers failing to record client information. Accurate and complete data capture has been a major emphasis of training in 2018. WelCAB Service Managers and Checkers (who provide quality assurance) have also been working to identify volunteers that are not collecting data and working with them to make improvements.

WelCAB should continue to improve its data capture processes. CABNZ should also ensure this gap is factored into changes / enhancements being made to cabinet through the current upgrade project.



# What can WelCAB do now to better support youth?

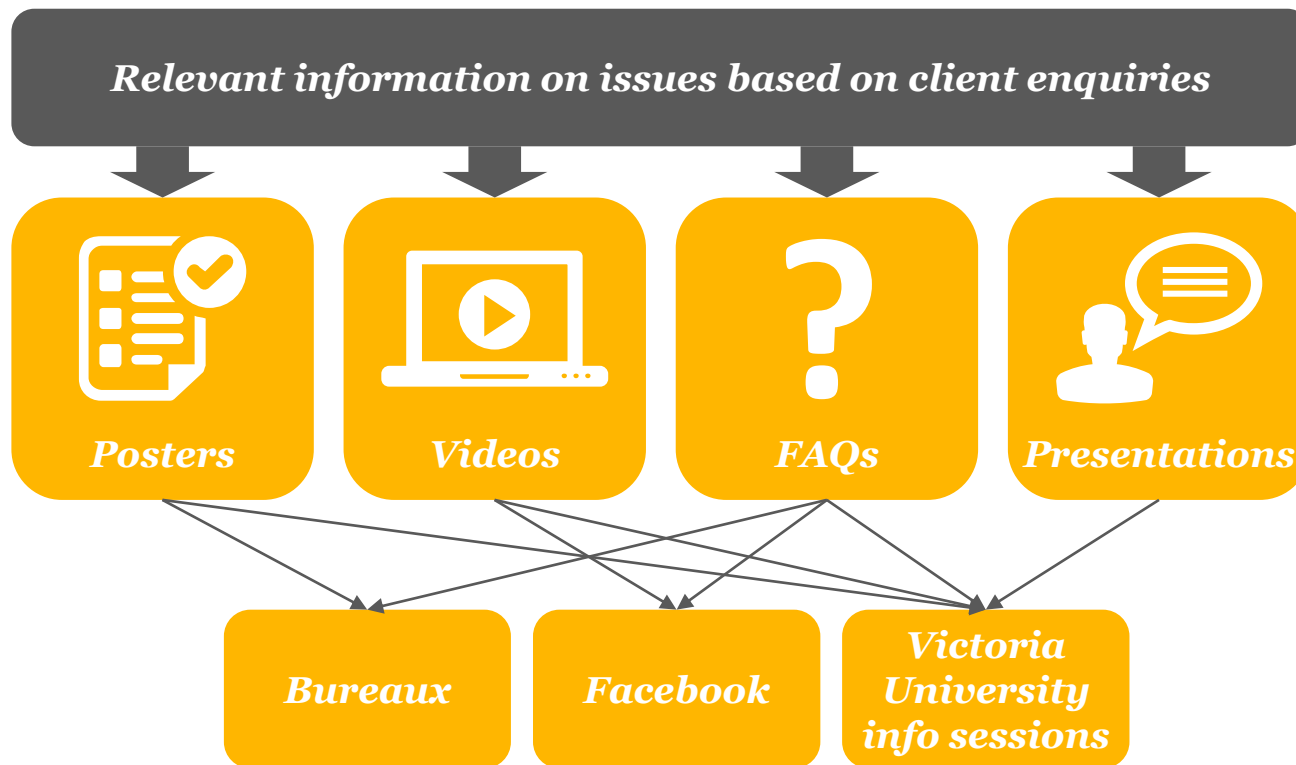
## ***Build information resources around priority youth issues and share through existing channels***

The WCC Youth Engagement Framework informs future WCC engagement with young people in Wellington with the aim of increasing youth engagement with local government in Wellington. The framework identifies 'Youth Priorities' as the issues that youth in Wellington consider most important to them. These issues relate to the environment; housing; transport; service delivery and public spaces; public safety; events and animals.

WelCAB can combine WCC's insight into youth priorities with its own experience dealing with young people to develop information materials such as posters, presentations, videos and FAQs.

WelCAB could start by compiling information resources related to the relevant 'Youth Priorities' that it has experience dealing with:

- **Housing issues.** These relate to the provision of private, public and social accommodation
- **Public safety issues.** These relate to the necessity for members of the community to feel safe while going about their everyday lives





# How could WelCAB reach more youth in the future?

## Develop new engagement methods for youth

WelCAB needs to consider alternative methods for interacting with youth to supplement its core face-to-face service. We know that youth prefer digital first – so WelCAB should broaden its digital presence to reach youth on platforms that they are already using. This could include:

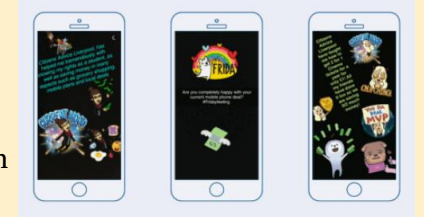
<p><b>Twitter</b> Sharing information proactively on relevant topics and updates about WelCAB activities / events</p>	<p><b>Snapchat</b> Sharing information proactively on relevant topics</p>	<p><b>Apps</b> Providing access to information from the CABNZ website in a Q&amp;A form through an app</p>
<p><b>Facebook*</b> Sharing information proactively about relevant topics and using the messenger tool to respond to client enquiries</p>	<p><b>Instagram</b> Sharing updates about WelCAB activities / events and volunteer experiences</p>	<p><b>Whatsapp</b> Offering an instant messaging information and advice service to answer client enquiries directly</p>
<p><b>YouTube</b> Sharing short videos describing relevant topics, client stories and volunteer experiences</p>	<p><b>Skype</b> Offering video information and advice service with volunteers to answer client enquiries directly</p>	<p><b>Events</b> Organising events at accessible locations (e.g. university halls, youth centres) to share information proactively on relevant topics</p>

*Note: WelCAB already has an active Facebook page that could be expanded*

## Case Study: Citizens Advice Liverpool

### Context

Liverpool has a large student population that experience a range of issues (e.g. related to renting and budgeting) but were not using Citizens Advice services. In, 2016 only 4% of Citizens Advice clients in Liverpool were aged 18 to 24.



### Opportunity

In 2016, Citizens Advice UK launched the Martin Lewis Fund (using a £669,000 donation) to support local Citizens Advice to help people access Citizens Advice services in inventive ways – across digital channels, health and well-being and new ways of volunteering.

### Initiative

Citizens Advice Liverpool developed an initiative tailored to students using Snapchat. This involved giving advice over messaging to those who didn't have time to go to an office or know how Citizens Advice could help them. It used Snapchat to post regular stories sharing information that students could use in everyday life and raise awareness of Citizens Advice. They also went to university Freshers' Fairs to spread the word about the service and how students could get support.

### Outcome

Most students that Citizens Advice spoke to didn't know much about Citizens Advice, but did have Snapchat. This initiative leveraged a platform that students were already using regularly to teach them about things that they didn't know were problems. When piloting the service, the student focus group felt that the likelihood of them accessing Citizens Advice had increased significantly and that all posts were helpful and relatable. It provided a new opportunity for Citizens Advice to reach its target audience and encourage young people to access its service in a brand new and innovative way.





# How could WelCAB increase collaboration to better reach youth?

## ***Target schools and universities to proactively share information and provide drop-in support***

WelCAB should start building relationships with secondary and tertiary educational organisations to explore new opportunities to interact with youth outside of their own branches.

Working more closely with educational organisations would enable WelCAB to gain direct access to youth. It would also give youth the opportunity to engage in subjects that matter to them and increase awareness for WelCAB / CABNZ's services more generally.

In particular, WelCAB could consider targeting secondary schools / colleges and tertiary education institutions to:

- ***Proactively share information*** on common youth issues and issues of high importance to youth
- ***Provide on-the-spot support*** through drop-in information and advice sessions

	Who to target	Potential initiatives
<b>Schools</b>	<ul style="list-style-type: none"> <li>• Counselling / student support services</li> <li>• Parents</li> <li>• Teachers</li> </ul>	<ul style="list-style-type: none"> <li>• Deliver assemblies / information sessions to older school students (aged 16-18)</li> <li>• Develop and share information guides around key topics</li> <li>• Have a WelCAB volunteer work alongside student counselling / support services</li> <li>• Run drop-in at parent / teacher consultations</li> <li>• Provide Link to CAB website on school website</li> </ul>
<b>Tertiary Education</b>	<ul style="list-style-type: none"> <li>• Students' Associations</li> <li>• Halls of residences</li> <li>• Student groups</li> <li>• Student magazines</li> </ul>	<ul style="list-style-type: none"> <li>• Run a stand at university orientation week</li> <li>• Develop and share information guides around key topics</li> <li>• Have a WelCAB volunteer work alongside student advocacy services</li> <li>• Run drop-in sessions from university locations e.g. halls of residences</li> <li>• Provide opportunities for students to volunteer at WelCAB</li> <li>• Run evening information sessions from the universities</li> <li>• Hand out free household objects (e.g. fridge magnets, keep cups) sharing WelCAB contact details</li> </ul>



# What can WelCAB do now to better support refugees?

## *Identify and use digital applications that could support real time language translation*

WelCAB provides services in different languages through its own volunteers and Language Connect (CABNZ's free multi-lingual service) but does not cover all refugee dialects. WelCAB could address any gaps in Language Connect's offering by identifying and using digital applications to support real time language translation.

A number of apps now offer both written and verbal translation services for little to no cost. WelCAB could identify relevant apps, make these known to volunteers and provide volunteers with basic instruction on how to use the apps (note: this may require the purchase of smartphones / tablets).

### **Examples of potential apps include:**





# How could WelCAB better support refugees in the future?

## *Provide more holistic support to refugee clients based on resettlement outcomes\**

Successful refugee resettlement can be defined by 5 broad outcomes (self-sufficiency; housing, education; health and well-being; and participation). Each outcome has corresponding indicators to measure success.

WelCAB can use these outcomes and indicators to provide more holistic support to its refugee clients and help them achieve successful resettlement. It could do this by developing a reference guide for volunteers to build into all interactions with refugees (even where the refugee has come to WelCAB for a different issue). This reference guide could include:

1. A checklist / questionnaire for volunteers to assess whether or not a refugee is tracking towards achieving the outcome areas or not e.g. to understand whether or not a refugee is in paid employment
2. Options of services that might help the refugee track positively towards the outcome where they demonstrate a negative indicator
3. Relevant organisations that might be relevant to refer the refugee on to for the required services
4. A standard form to record details of the interaction (which would probably need to be incorporated into cabinet).

An example of the type of information that would form the basis of the reference guide is shown in the table to the right.

NZ Refugee Resettlement Outcome	Factors that indicate refugees is not on track to achieve the outcome	Services that can help increase refugees chances of achieving the outcome	Organisations that refugees can be referred to for support
<b>Self-sufficiency</b>	Is not in paid employment	English lessons Training / qualifications Childcare assistance	MCLaSS TEC CareersNZ WINZ
	Is receiving unemployment-related benefits		
<b>Housing</b>	Is receiving refugee housing subsidy		
<b>Education</b>	Has not / is not on track to attain NCEA Level 2 after 5 years or more in the New Zealand Education system		
<b>Health and well-being</b>	Has not received age-appropriate immunisations		
	Does not have access to / use GP services		
	Does not have access to / use mental health services		
<b>Participation</b>	Does not have adequate English language skills		

WOULD BE FURTHER POPULATED BY WELCAB...



# How could WelCAB better reach social housing tenants?

## *Establish drop-in sessions at large social housing sites in Wellington*

There are a number of large social housing complexes in Wellington accommodating 100+ individuals in a single location. WCC already operates ‘tenancy advisor clinics’ in the community rooms or tenancy advisor offices of all larger complexes (on a weekly or fortnightly basis). Housing NZ is also committed to creating community spaces for all new sites developed in Wellington, which will create more room for drop-in sessions.

WelCAB could work with WCC and Housing NZ (who operate the majority of these large complexes) to establish drop-in information and advice sessions from the complexes. These drop-in sessions could supplement existing support services by covering a broader range of topics than pure tenancy issues. Potential locations are provided below.

### *Te Mara Apartments*



**Location:** Mount Cook  
**Operated by:** Housing NZ  
**Number of units:** 104  
**Number of tenants:** ~320

### *Central Park Apartments*



**Location:** Brooklyn  
**Operated by:** WCC  
**Number of units:** 213  
**Number of tenants:** ~250

### *Berkeley Dallard and Etona Apartments*



**Location:** Mount Cook  
**Operated by:** WCC  
**Number of units:** 121  
**Number of tenants:** N/A

### *Dixon Street Flats*



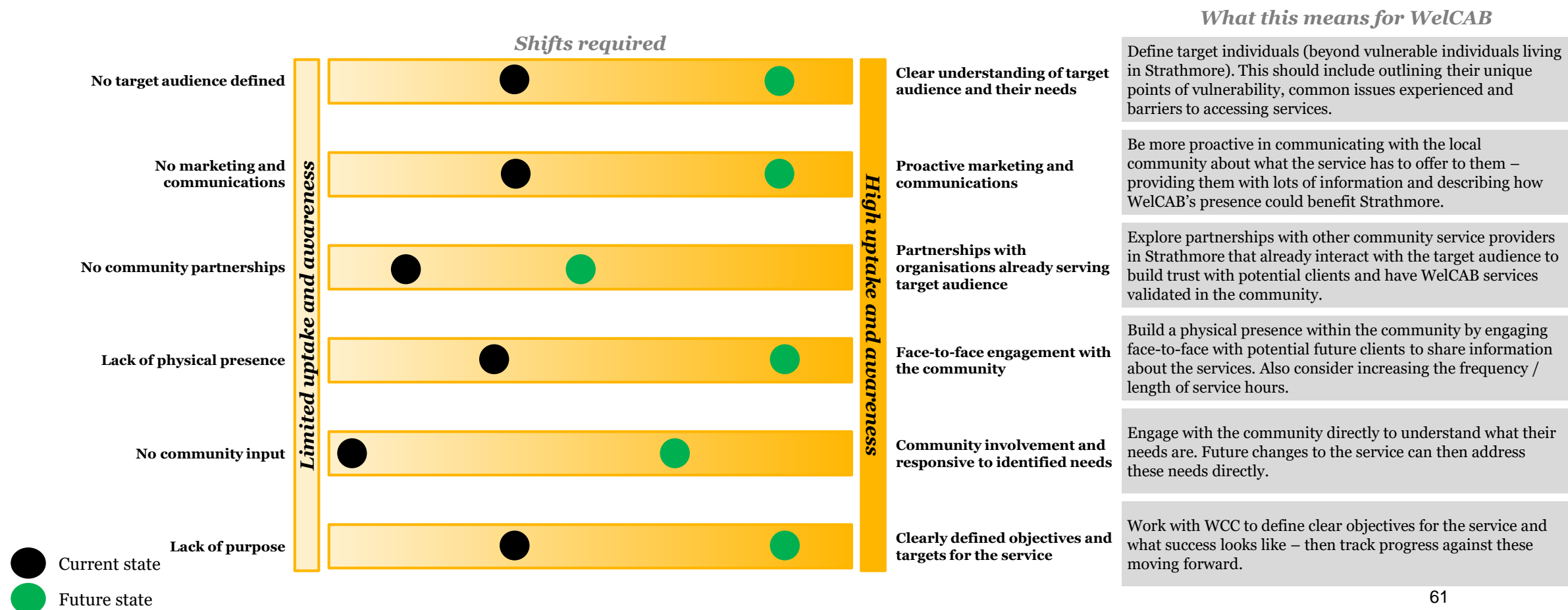
**Location:** Wellington City  
**Operated by:** Housing NZ  
**Number of units:** 115  
**Number of tenants:** ~115



# How can WelCAB increase reach in Strathmore?

## Address existing challenges with the existing Strathmore satellite service by adopting more effective outreach techniques

As outlined in the current state, WelCAB’s satellite service in Strathmore has received limited uptake from clients due to challenges with availability, access, awareness and equipment. To address these challenges, WelCAB should look at the characteristics of effective outreach service delivery models to inform future improvements to the service. The diagram below outlines some of the shifts that WelCAB would need to make to move from its current position to more effective outreach in the future.



# How could WelCAB increase collaboration and integration with other service providers in the future?

## *Explore opportunities to extend WelCAB's existing 'hub' model by integrating with new community service hubs in new locations*

Across the wider community and not-for-profit sector, organisations are increasingly sharing premises in 'community hubs'. These hubs are designed to provide a range of services from different organisations, maximising benefit to customer and providers. To a large extent, WelCAB already operate a type of 'mini hub' model by providing a central location where other community service providers can offer their specific services (and often rely heavily on WelCAB Managers to take responsibility for meeting community centre compliance regulations and requirements). They are also currently located within Community Centres that offer other services from the same location.

To further extend this model, WelCAB could consider joining community service hubs in new locations. Two possible examples are the Tawa and Linden Plunket Clinics and the Berhampore Community Centre. As well as providing WelCAB an opportunity to reach more / new clients and complement other community service offerings, these locations would also provide WelCAB an opportunity to adopt and promote a more modern 'look and feel'.

### *Tawa and Linden Plunket Clinic*



Tawa and Linden Plunket Clinics operate a range of services including WellChild (Plunket nurse); toy library; parent groups; parenting workshops; education and antenatal courses; coffee groups; and community events. They offer room hire at a discounted rate to other not-for profits. WelCAB could consider providing a drop-in service.

### *Berhampore Community Centre*



Berhampore Community Centre is a partnership between WCC, a local school and Housing NZ. The centre operates services such as Plunket, Community Law legal advice, Housing NZ Tenancy Manager drop-in sessions, Parent2Parent Support and ManUp Support Group. The location of the centre (within a Housing NZ complex) and nature of services provided would make it an attractive potential site for WelCAB.



## Opportunity 3: Volunteers

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*There is an opportunity to broaden recruitment and involvement of the community to fill capability and capacity gaps (e.g. fundraising, communications, marketing, data and analytics)*



# What needs to change get the most from volunteers?

*There is an opportunity to broaden recruitment and involvement of the community to fill capability and capacity gaps (e.g. fundraising, communications, marketing, data and analytics)*

**There is scope to further leverage the volunteer workforce to fill capacity and capability gaps in WelCAB's paid workforce**

## *Keep doing...*

- Maintain highly skilled volunteer base
- Maintain the volunteer roles that exist today to deliver core service, operations and governance
- Continue volunteer induction and ongoing training to support existing roles

## *Do differently in the short term...*

- Explore opportunities for volunteers to support discrete 'back office' tasks (based on capability and capacity gaps in WelCAB's paid structure)
- Explore opportunities to receive pro bono support from outside organisations / individuals

## *Do differently in the long term...*

- Develop and implement a youth volunteer strategy to increase youth participation





# How could WelCAB better leverage existing volunteers?

## ***Create opportunities for volunteers to support discrete ‘back-office’ tasks***

WelCAB could explore opportunities for volunteers to use their skillsets to support ongoing operations in new ways to address existing capacity and capability gaps.

This could be achieved by creating new volunteer roles, building in additional accountabilities to existing role descriptions or creating a “job bar” with tasks for volunteers to complete during quiet periods. Suggested opportunities for new areas to provide support are presented in the table on the right.

*Note: this recommendation would require additional management responsibility to enable volunteers to provide support in this way e.g. to give direction and ensure quality standards are met. It would also likely require new volunteers to take on these responsibilities due to existing capacity constraints.*

Current gap	Support required	Suggested responsibilities
Marketing and communications	Marketing	<i>Increase uptake of WelCAB services by:</i> <ul style="list-style-type: none"> <li>Leading certain marketing activities</li> <li>Defining and tracking progress of markets activities against targets</li> </ul>
	Social media	<i>Increase WelCAB’s social media presence by:</i> <ul style="list-style-type: none"> <li>Operating and growing existing social media channels (Facebook)</li> <li>Exploring new / alternative social media platforms</li> <li>Delivering all social media activities on ongoing basis</li> </ul>
	Communications	<i>Increase awareness of WelCAB’s services and how they can be accessed by:</i> <ul style="list-style-type: none"> <li>Developing communications materials</li> <li>Exploring new / alternative communications channels</li> <li>Sharing communications materials (internally and external) on an ongoing basis</li> </ul>
Fundraising	Fundraising	<i>Raise funds for WelCAB through donations and sponsorships by:</i> <ul style="list-style-type: none"> <li>Exploring new fundraising opportunities for WelCAB and organising fundraising campaigns</li> <li>Writing grants applications</li> <li>Building relationships with donors and sponsors</li> </ul>
Relationship management	Stakeholder management	<i>Manage relationships with key stakeholders on behalf of WelCAB by:</i> <ul style="list-style-type: none"> <li>Developing a stakeholder engagement plan that defines key stakeholders, relationship goals and activities</li> <li>Meeting with key stakeholders (with support from paid WelCAB / CABNZ staff where required)</li> </ul>
Data analysis	Insights	<i>Create greater value from WelCAB’s client data by:</i> <ul style="list-style-type: none"> <li>Analysing client enquiry records to identify trends and insights</li> <li>Creating dashboards / reports to share trends and insights in a visual way</li> </ul>
Change / continuous improvement	Change	<i>Support WelCAB to implement organisational changes by:</i> <ul style="list-style-type: none"> <li>Running change projects (with support from other volunteers where required)</li> <li>Identifying opportunities for future improvements</li> </ul>



# How could WelCAB fill critical capability gaps?

## Explore opportunities to receive pro bono volunteering support from outside organisations / individuals

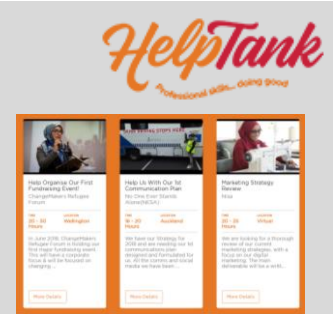
Many organisations offer pro bono services, where professional work that typically requires a fee is provided for free. It is a form of service that uses specific skills of professionals to provide services to those who are unable to afford them.

Given WelCAB's limited financial resources and the current capacity and capability of volunteers, it could seek support from organisations / individuals for specific pro bono services to address skill gaps that cannot be filled internally.

Some organisations are already established to connect willing skilled individuals to charitable organisations requiring support. Examples of organisations that WelCAB could approach are shown to the right.

### HelpTank

HelpTank is an organisation that helps to supply skilled volunteers to community groups through a digital marketplace. HelpTank provides the opportunity for not-for-profits in need of specialist skills to seek support for projects / initiatives. HelpTank will then support them to match with individuals looking to invest their time. Common skills requested include law, accounting, marketing and communications.



### Ignite Consultants

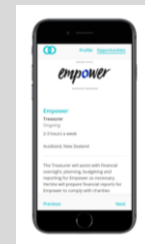
Ignite is a student-run not-for-profit that provides free business advice and strategic planning to charities in Dunedin and Wellington. It helps clients to overcome a range of obstacles to achieve their goals by providing support through student-led projects. Projects can include sourcing creative funding revenues, networking and supporting long / short-term strategic planning.



### Collaborate

Collaborate is a mobile app that connects people to volunteer opportunities that match their skills and interests. It lets organisations post projects that they need volunteer support for and find skilled volunteers quickly.

collaborate





# How could WelCAB increase its youth volunteer base?

## *Develop a youth volunteer strategy to increase youth volunteer participation*

WelCAB should develop a youth volunteer strategy to define what it has to offer youth, how youth will support the organisation in the future and how it will increase its youth volunteer base. This will be important to increase the sustainability of WelCAB's workforce and increase access to youth in Wellington through the volunteer group. Components that may be included in the strategy are described below.

<b><i>Clear articulation of the cause</i></b>	<b><i>Youth volunteer value proposition</i></b>	<b><i>Role descriptions</i></b>	<b><i>Communications methods</i></b>	<b><i>Incentives</i></b>	<b><i>Recruitment process</i></b>
<p><i>A story that demonstrates WelCAB's purpose and gives young people a reason to believe in the organisation</i></p>	<p><i>A description of what volunteering at WelCAB has to offer youth volunteers, including skill development, impact in the community and how they will be supported by the organisation</i></p>	<p><i>A clear and attractive description of the roles that young people can hold to help them understand how they can get involved and the impact that they can make</i></p>	<p><i>The communications methods and channels that will be used to interact with young people using their preferred methods of contact</i></p>	<p><i>Offerings that might help attract youth volunteers by playing to their individual motivations and support them to achieve their personal goals</i></p>	<p><i>An overview of the steps and timing required to apply for, interview and be accepted into a role. This should be as streamlined as possible</i></p>
<ul style="list-style-type: none"> <li>• Tell the cause in the form of a story</li> <li>• Use videos and social media channels to share the story</li> <li>• Provide a range of angles to make the cause resonate with them</li> <li>• Use simple messaging and keep stories short</li> </ul>	<ul style="list-style-type: none"> <li>• Identify peer mentors for younger volunteers and operate a coaching model to support development of youth volunteers</li> <li>• Provide targeted training to young volunteers</li> <li>• Provide more flexible volunteering options to accommodate different time availabilities</li> <li>• Identify opportunities for young volunteers to be autonomous and creative in their roles</li> </ul>	<ul style="list-style-type: none"> <li>• Develop new roles that appeal to youth e.g. overseeing social media</li> <li>• Give youth responsibilities to participate in / lead change initiatives to help modernise WelCAB's services</li> <li>• Demonstrate the range of opportunities available within the organisation</li> </ul>	<ul style="list-style-type: none"> <li>• Use social media channels to share visual content</li> <li>• Go to schools and universities to talk about the organisation</li> <li>• Work with existing young volunteers to share their experiences</li> <li>• Communicate with youth volunteers using their preferred methods on an ongoing basis</li> </ul>	<ul style="list-style-type: none"> <li>• Offer internship programmes or CV references in exchange for volunteer work</li> <li>• Explore partnerships with universities, colleges and schools</li> <li>• Identify and share social opportunities of volunteering e.g. meeting new people</li> </ul>	<ul style="list-style-type: none"> <li>• Explore alternative recruitment methods e.g. using volunteer recruitment agencies such as Collaborate (app for advertising and applying for volunteer positions)</li> <li>• Develop a youth-specific recruitment process</li> </ul>

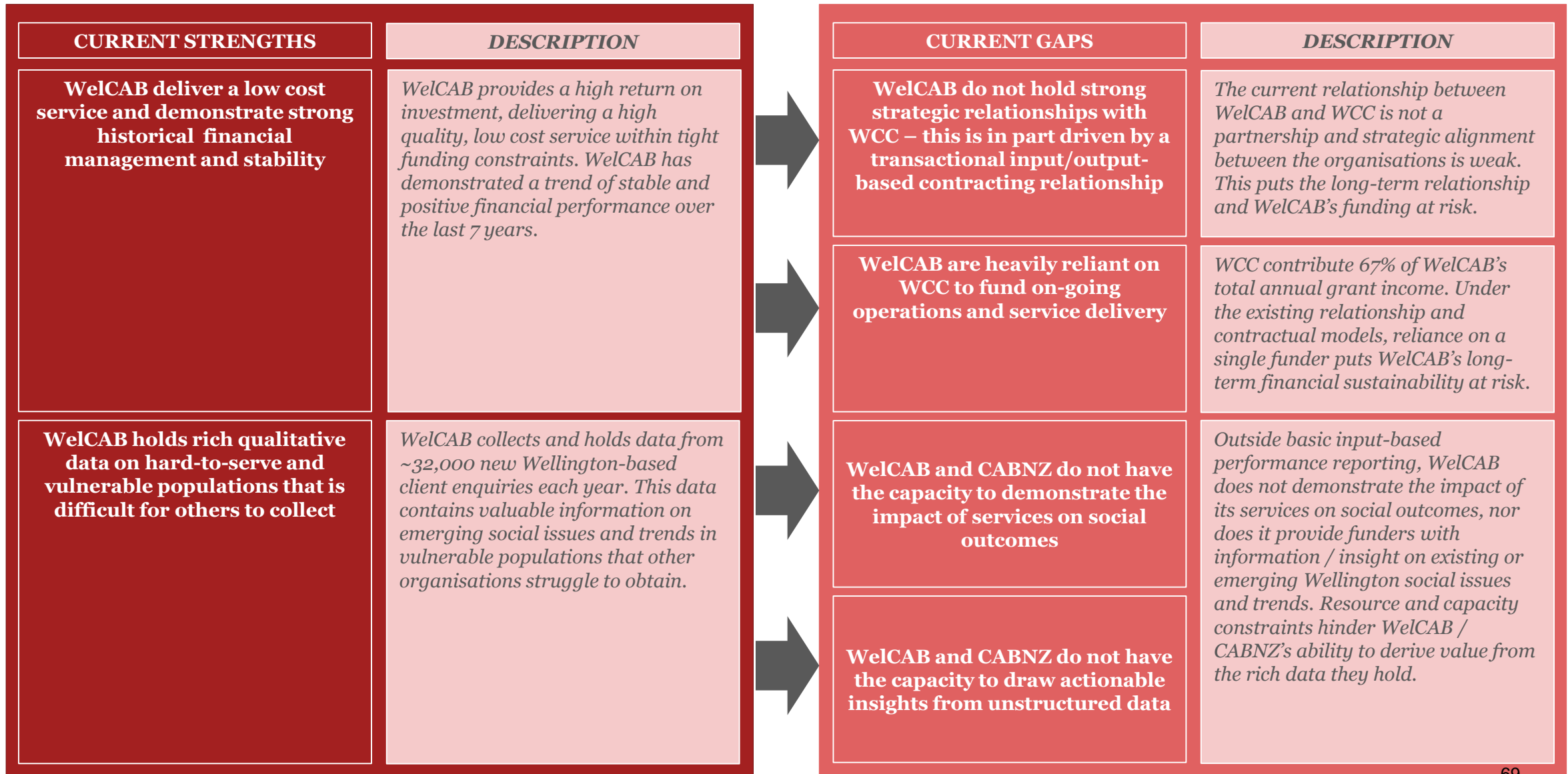


## E. Service funder current state assessment

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# Service funder current state summary





# Service funder value proposition

WelCAB's services help funders reach harder-to-serve Wellingtonians more *effectively* and *inexpensively* than funders can in-house, *preventing greater vulnerability*, *building communities*, and *gathering data* for actionable insights

## *Effective*

WelCAB's *independence* and *confidentiality* are fundamental to attracting and helping *harder-to-serve* Wellingtonians effectively.

This independence and confidentiality cannot be duplicated by WelCAB's public sector funders in-house.

## *Inexpensive*

Because services are primarily staffed by *volunteers*, services are *low cost*. This *volunteer workforce* cannot be duplicated easily inside the public sector organisations who fund WelCAB.

## *Preventing greater vulnerability*

Many of the people WelCAB serves are *on the cusp of more severe vulnerability*.

In helping someone maintain their income, housing, and access to services, WelCAB can *prevent severe vulnerability and distress* and its human and financial costs.

## *Building communities*

WelCAB engages residents as volunteers to help each other and build more *cooperative, resourceful and resilient communities*

## *Gathering data*

Government organisations struggle to gather information on the more vulnerable and hard-to-serve. WelCAB holds a *wealth of data* from working with these populations and can *shed light on this blind spot* for policy and service development.

# Interviewees saw significant potential for WelCAB to deliver great value to its funders

*“It is incredibly difficult to collect data on vulnerable communities– yet these are the populations of most interest to Government. Community-based organisations like CAB are well placed to collect this information and provide much needed insight”*

*“With changes in the way government services are delivered (i.e. shutting down physical offices and moving to digital channels), WelCAB can increasingly play a critical role to help people access these services”*

*“I have never seen insights provided by WelCAB – but they would be hugely valuable to the Council, especially for planning”*

*“There seems to be lots of duplication across the various community service organisations in Wellington – it is not clear how WelCAB differs”*

*“At the moment, CAB can be perceived as a squeaky wheel advocate – there is a need to build stronger relationships with other organisations to increase influence”*





# Current relationship between WelCAB and WCC

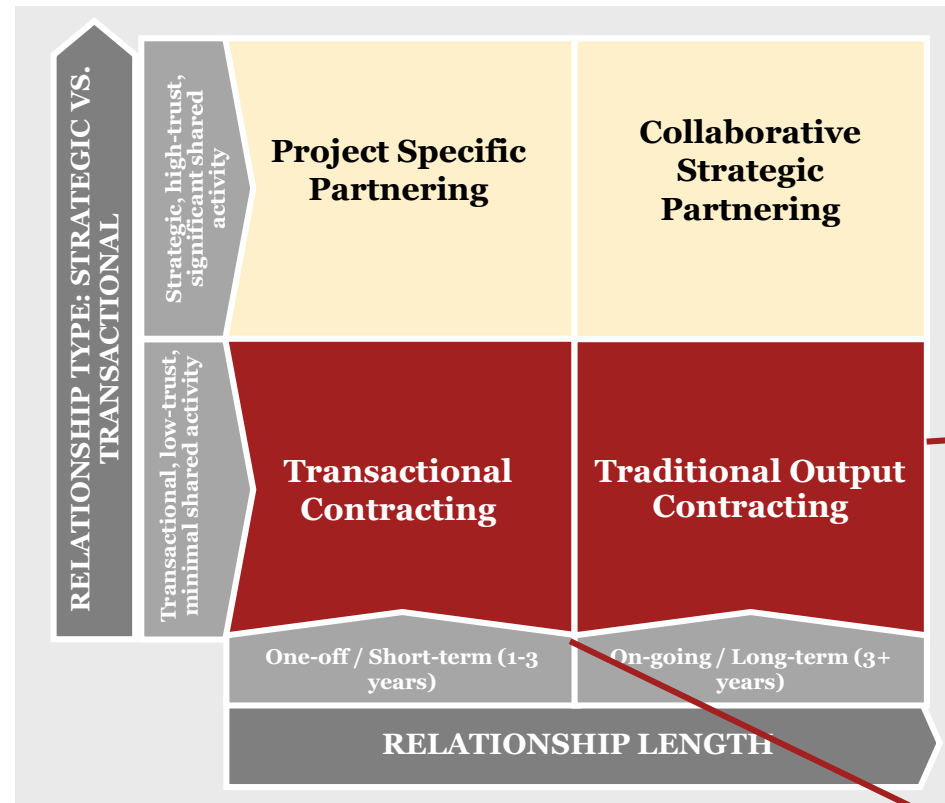
## ***WelCAB and WCC operate a mixed input / output based transactional contracting relationship***

The matrix to the right shows different types of funder / provider relationships – where the relationships are mapped against: **relationship length vs. relationship type (i.e. strategic vs. transactional)**. At present, WelCAB and WCC operate a transactional contracting relationship that is both input and output based. Key characteristics of the current WelCAB / WCC relationship are described on the following two pages.

## ***The contracting arrangement has driven a transactional and low-trust relationship between WelCAB and WCC***

WelCAB and WCC operate in more of a transactional manner than as a partnership, which has put the long-term future of the relationship at risk. This is a common consequence of transactional / traditional contracting arrangements.

Additionally, from our stakeholder interviews we understand WelCAB has invested limited time in building strong strategic relationships with WCC leaders or Councillors. This lack of connection and collaboration appears to have eroded the strength of the overall relationship over time – to the extent that mutual trust is low.



*This is a traditional type of funder / provider relationship where funding may be on-going but still subject to an application process. The relationship is based on a contractual document that is controlled by specification of outputs.*

*A transactional type of funder / provider relationship where funding is granted through a competitive application process largely for the provision of inputs.*

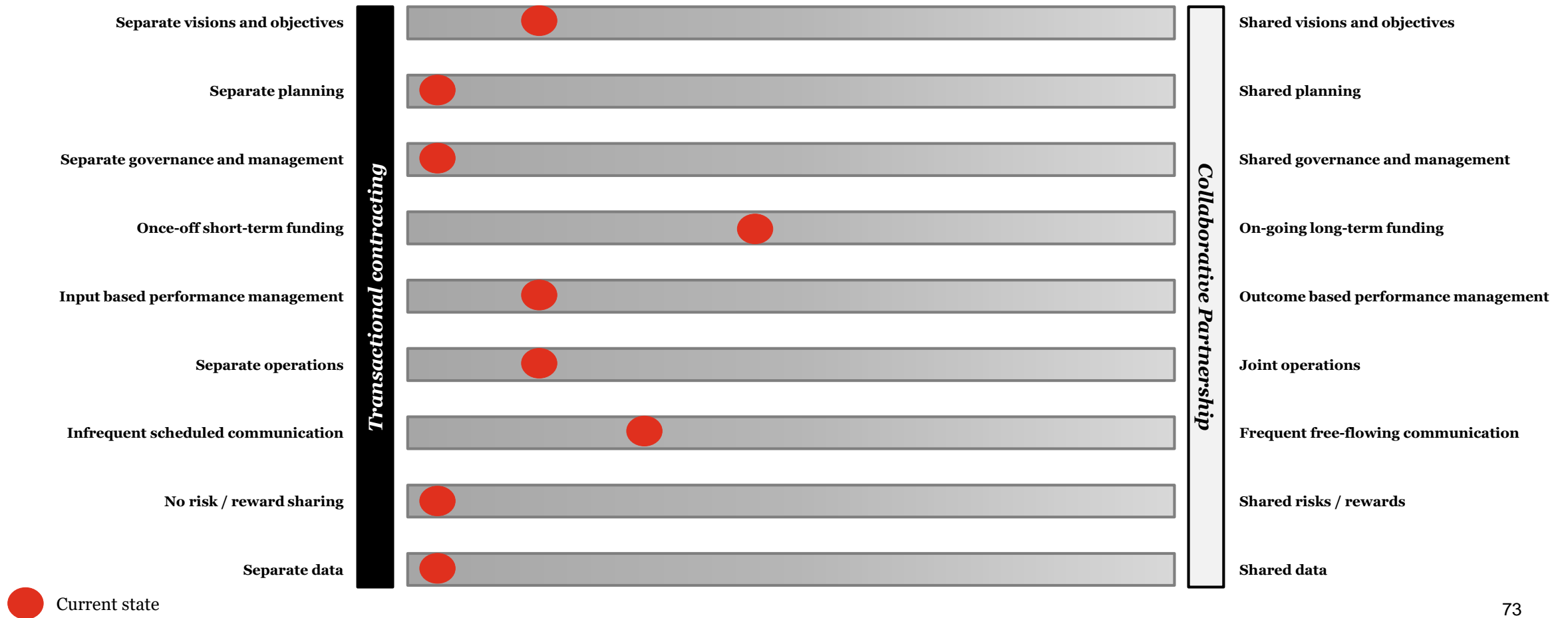




# Traditional contracting vs. collaborative partnership

***WelCAB and WCC’s relationship is more reflective of a transactional contracting arrangement – rather than the desired collaborative partnership***

The framework below shows the ways in which a transactional contracting arrangement differs from a collaborative partnership. The red dot provides an indication of the current status of the relationship between WelCAB and WCC. The assessment against each scale is explained and explored in more detail on the following page.





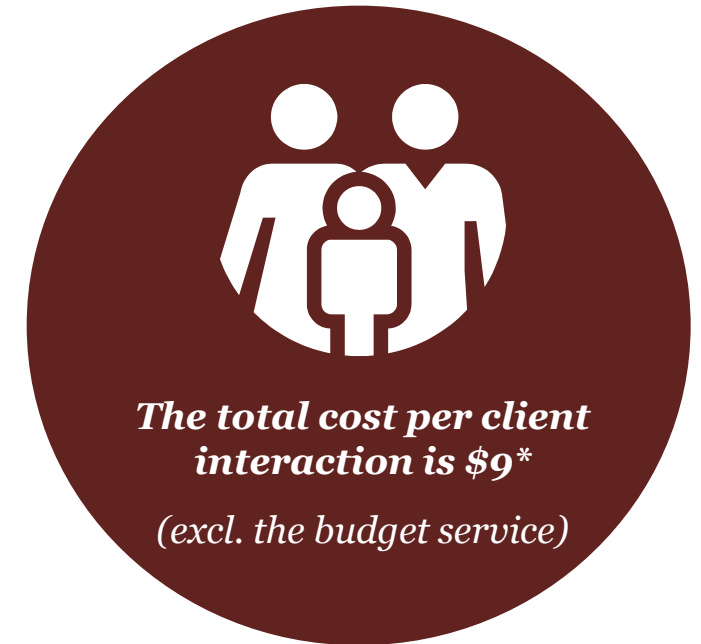
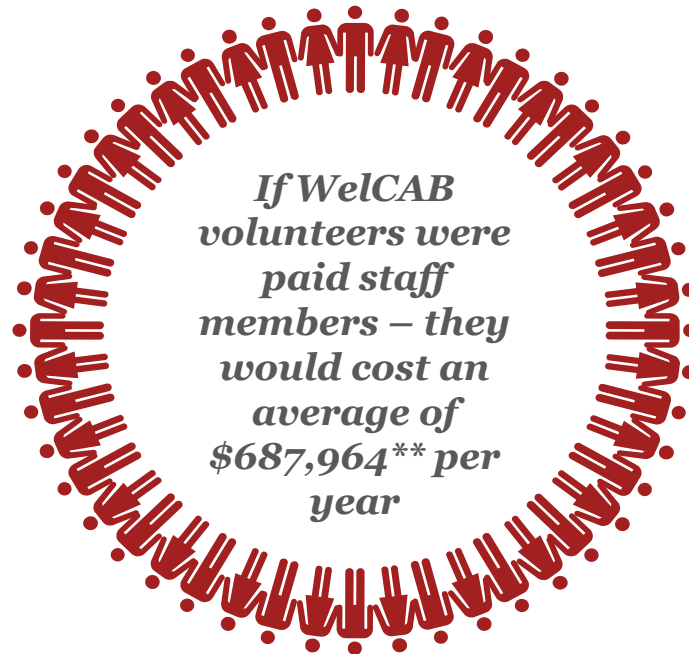
# WelCAB and WCC's current relationship

	Current WelCAB and WCC relationship
<b>Vision, objectives and guiding principles</b>	<ul style="list-style-type: none"> <li>• WelCAB and WCC have a long-standing historical relationship that has been in place for 12 years (since the amalgamation of the individual 6 bureaux)</li> <li>• WelCAB and WCC seek to improve social outcomes in the Wellington community but have limited alignment between each organisation's strategic priorities</li> <li>• WelCAB have made some recent changes to its service delivery approach / model (such as trialling satellite clinics) to align with WCC's strategic priorities within existing funding constraints. WelCAB have explored opportunities to create further alignment (e.g. with Housing NZ), but to date have made limited progress towards implementing these</li> </ul>
<b>Planning</b>	<ul style="list-style-type: none"> <li>• WelCAB and WCC perform their planning independently and the organisations do not actively share their respective plans</li> </ul>
<b>Governance and management</b>	<ul style="list-style-type: none"> <li>• Both WelCAB and WCC have separate governance and management structures</li> <li>• Under the current contracts WelCAB enjoys relative freedom to determine how outcomes will be achieved</li> </ul>
<b>Funding and costs</b>	<ul style="list-style-type: none"> <li>• WCC provide WelCAB with 3-year operating and specified funding grants</li> <li>• While WCC and WelCAB have a long-standing relationship, the move to a 3-year funding contract (from a previous 10-year contract) has reduced WelCAB's certainty around continued long-term funding</li> <li>• WCC provide WelCAB with free access and use of premises, which WelCAB use to deliver its core services</li> <li>• WelCAB and WCC do not share any costs (although WelCAB contributes toward the running costs of the properties provided by WCC)</li> </ul>
<b>Performance management and reporting</b>	<ul style="list-style-type: none"> <li>• WelCAB provide contractual performance reporting to WCC on a six-monthly basis</li> <li>• The contract largely measures against inputs e.g. "maintain the required number of volunteers". Some output measures are also included e.g. "respond to enquiries on any issues, including housing and tenancy..."</li> </ul>
<b>Joint operating controls</b>	<ul style="list-style-type: none"> <li>• WCC have specified outcomes in the operational funding contract although the measures are predominantly input-based</li> <li>• The funding contract is purely focussed on WelCAB's performance and WCC has the mandate to amend its targets and measures</li> </ul>
<b>Communication</b>	<ul style="list-style-type: none"> <li>• Non-routine communication between WelCAB and WCC is limited</li> <li>• Routine communication is usually initiated by WCC and centred around formal reporting or changes to the contract</li> </ul>
<b>Risk and reward sharing</b>	<ul style="list-style-type: none"> <li>• Per the WCC funding contract, WelCAB are required to have sufficient funds to operate and enough in reserves to continue for 6 months if the primary funder withdraw funds – this suggests low tolerance for loss</li> <li>• Outside the contractual relationship, there is limited evidence to suggest WCC and WelCAB take specific steps to help each other succeed / gain</li> </ul>
<b>Data sharing</b>	<ul style="list-style-type: none"> <li>• WCC do not share data with WelCAB</li> <li>• WelCAB provide basic statistical data to WCC in the form of performance reporting (against the funding contract). This also includes a bi-monthly report on enquiries received from priority suburbs (Strathmore, Linden, Newtown, Newlands and Grenada North)</li> </ul>



# Current cost of service delivery and return on investment

*WelCAB delivers a high value, low cost service (\$9 per client interaction) and achieves a high return on investment (139%) through its workforce of volunteers*



Measure	WelCAB (2016/17)	Comparative (2017)
Average annual salary per paid FTE (incl. budget service)	\$46,000	\$50,000 (average NZ salary)
Total cost per FTE (paid and volunteer) (incl. budget service)	\$22,000	\$50,000 (average NZ salary)

\*Calculation based on total expenditure excluding the budget service (\$277,805) divided by total interactions of 30,799 - excludes non-cash costs such as volunteer time and rental costs forgone

\*\*Calculation is based on the average number of volunteer hours per year (from 2009 to 2017) x an average wage of comparable Wellington-based roles at \$24.48 per hour

\*\*\*Calculation is based on the gain achieved from free volunteer time (\$687,964) and the total cost for WCC (\$287,787 – which is the cost of annual funding + the estimated cost of rent forgone)

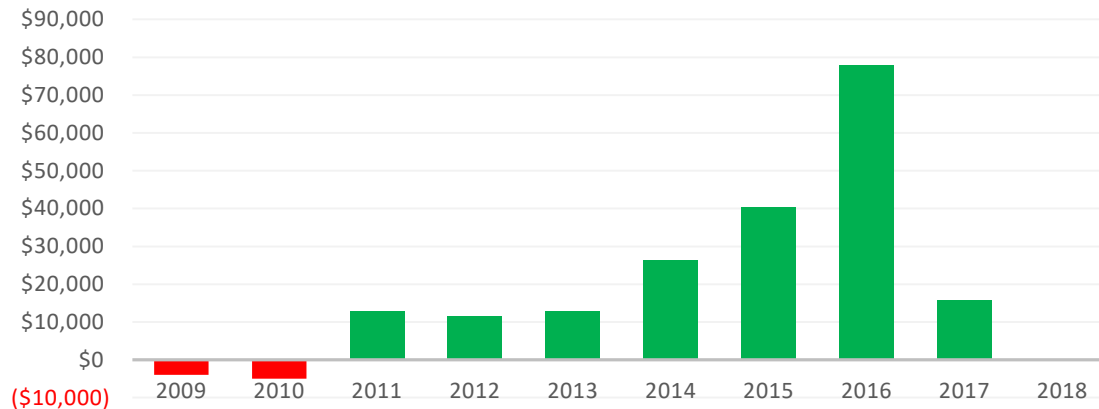


# Current financial performance and stability

## *WelCAB operates within its funding constraints and has a trend of stable and positive financial performance*

The graph below shows that WelCAB have achieved an operating surplus in 7 of the last 10 years\*. This demonstrates careful financial management and an ability to operate within tight funding constraints (as opposed to an excess of funding). Preliminary results for the current financial year suggest that WelCAB have broken even, which suggests WelCAB are operating at the limit of current funding constraints.

**WelCAB Net Surplus / Deficit (2009 - 2018)**



The table below shows the current ratio at the end of each financial year between 2009 and 2017. WelCAB have consistently achieved a current ratio greater than 1.0, which indicates that an ability to settle current liabilities as they come due.

Year	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>Current ratio</b>	2.23	1.69	1.74	1.64	1.86	2.06	7.95	9.67	11.32

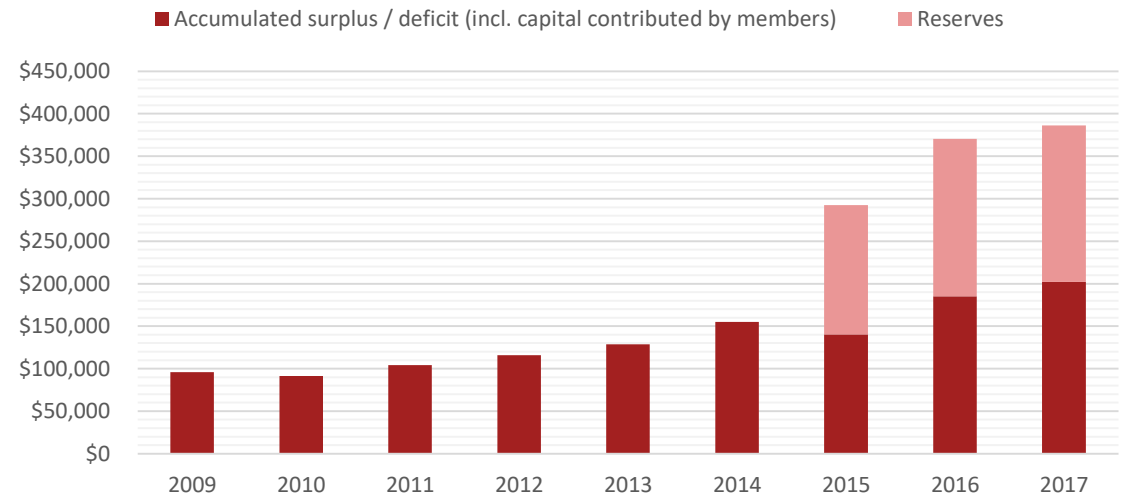
\*Note: higher surpluses were reported in 2015 and 2016 due to WelCAB changing to tier 3 charity reporting, requiring unspent MSD grant income for the Budget Service to be reported in the year it was received (rather than being carried forward as in previous years). From 2017 onwards, MSD grant income was reduced significantly.

## *WelCAB's portion of reserves is only enough to sustain operations for ~6 months if funding was lost*

Commencing with an initial endowment fund of \$96k, WelCAB has steadily grown its equity balance over the last 9 years by reinvesting surplus funds. It should be noted that reserves are notionally split between WelCAB and the Budget Service in 2016/17.

This means that WelCAB would have access to approximately \$197k of the total reserves balance and would only be able to operate for ~6 months if it were to lose WCC funding. Further, since the Budget Service funding has been reduced in recent years, there has been a requirement to use some of the reserves (\$188k). It is forecast that the total reserve balances for the Budget Service will be exhausted in ~2 years.

**WelCAB Equity (2009 - 2017)**





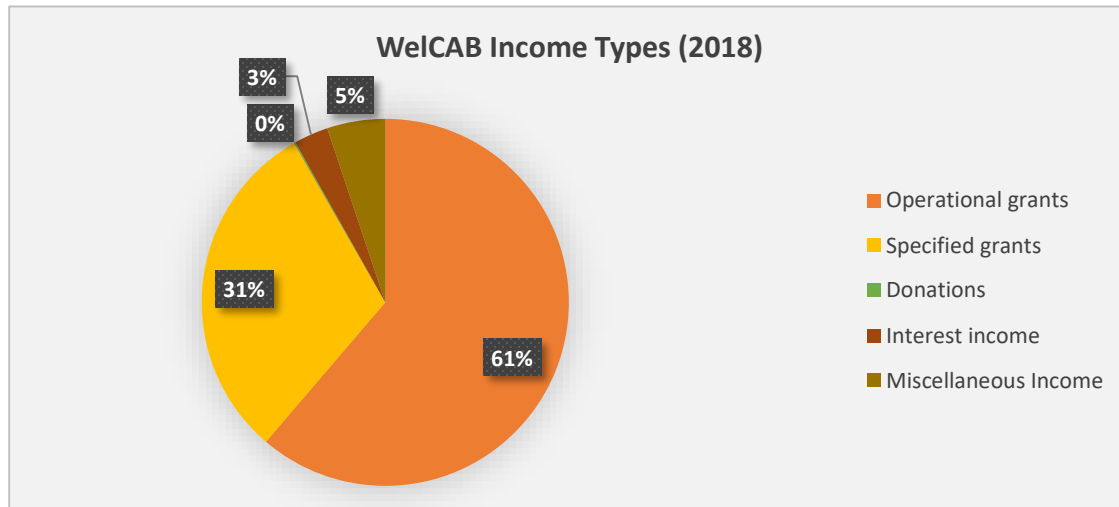
# Current income and expenditure types

**At 92% of total annual income, WelCAB relies almost entirely on grant income to fund its operations and services**

The graph below provides a snapshot of WelCAB’s income sources. The graph shows that 92% of WelCAB’s total annual income is sourced from grants. WelCAB receives two different types of grant income:

1. Operational grants: Grants intended to fund operational expenditure such as wages and salaries of permanent staff members, normal operating administrative expenditure etc.
2. Specified grants: Grants intended to fund a specific outcome, service or expenditure type. Examples include: funding received for the budget service, funding received to provide Wellington city with emergency event support etc.

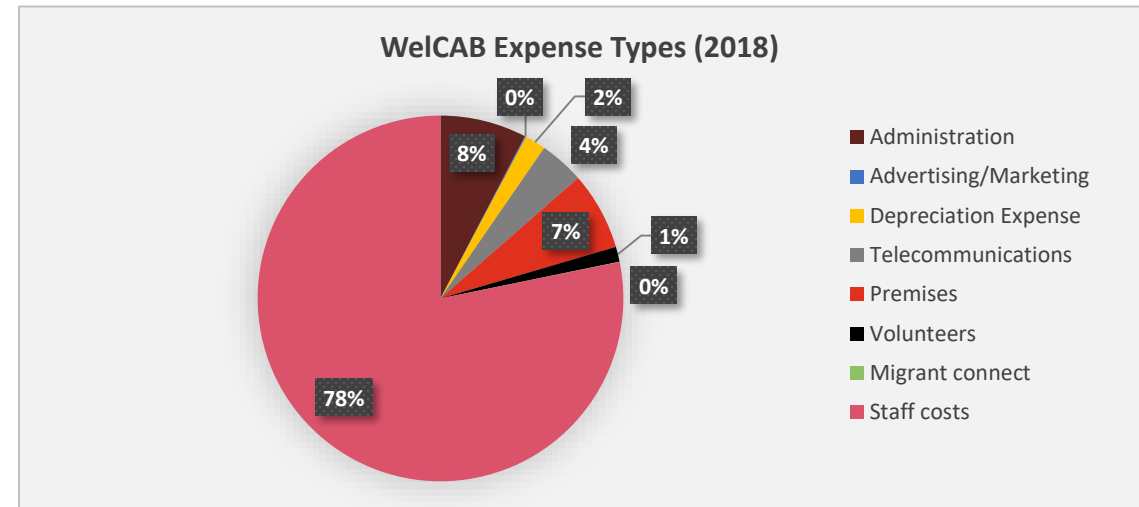
A more detailed analysis on grant income is presented on the following page.



**At 78% of total annual expenditure, staff costs form the largest component of WelCAB’s expenditure**

The graph below provides a snapshot of WelCAB’s expenditure profile. The graph shows that staff costs form the largest proportion of WelCAB’s annual expenditure (78% of total annual expenditure). The implication of this expenditure profile is that WelCAB have limited flexibility in the way in which operational funds are allocated. As WelCAB have only a small number of paid staff (9 individuals and 5 FTE), this means that if WelCAB were to change or widen its service offering in any way, there would be a likely requirement for additional project-based and on-going operational funding.

The other two largest areas of expenditure are administrative costs and premises costs, which make up 8% and 7% of total annual expenditure respectively. With respect to premises costs, it should be noted that the majority of these costs relate to renting additional premises to offer the budget service. WelCAB does not pay rental fees for its 5 core locations (Central, Kilbirnie, Johnsonville, Newtown and Karori) as these premises are provided free of charge by WCC.





# Current grant income trends

## ***WelCAB are heavily reliant on funding from Wellington City Council to deliver existing services***

As shown on the previous page and the graph to the right, WelCAB are heavily reliant on funding provided by Wellington City Council (WCC).

Despite service demand increasing over the last three years, funding levels have remained largely constant. As mentioned on the previous page, this suggests WelCAB are operating at the limit of current funding constraints and if service demand continues to rise, existing funding levels may not be sufficient.

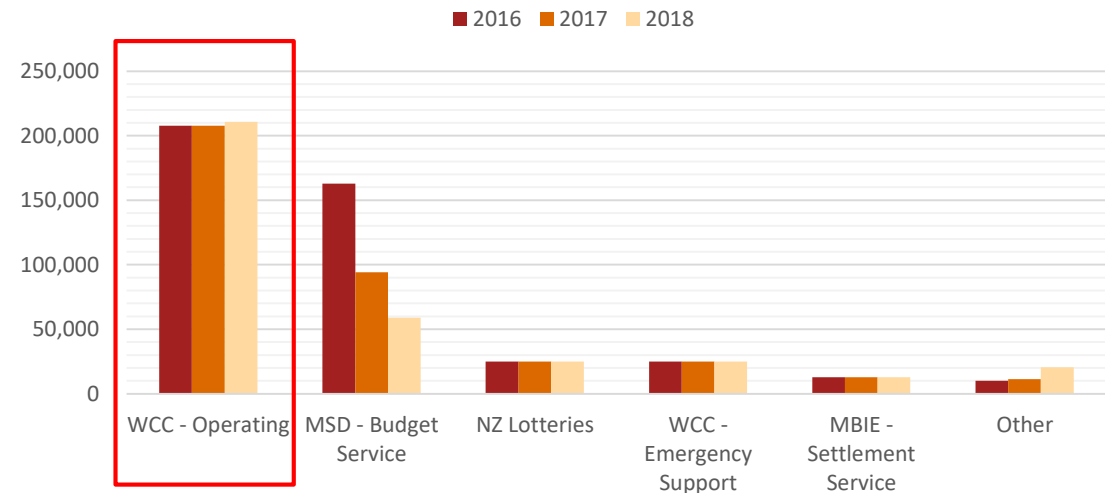
Further, while this trend provides evidence of an enduring and long-term relationship between WelCAB and WCC, WCC have recently changed the terms of the funding contract from a 10 year duration to a 3 year duration. This change means that future funding decisions may be more likely to be influenced by the council's 3-year electoral cycle, putting WelCAB's long term sustainability at risk.

## ***WelCAB have retained a stable level of annual grant income over the last 10 years***

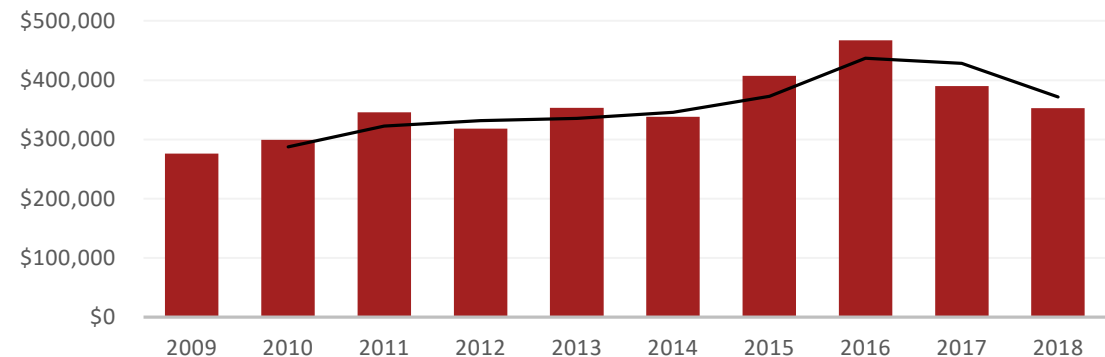
As shown by the graph to the right – since 2010, WelCAB have consistently attracted annual grant funding between \$300k and \$480k (with an average annual funding of \$372k). There have only been small fluctuations between years\*, which provides evidence of historically strong and stable funding relationships.

\*Note: higher surpluses were reported in 2015 and 2016 due to WelCAB changing to tier 3 charity reporting, requiring unspent MSD grant income for the Budget Service to be reported in the year it was received (rather than being carried forward as in previous years). From 2017 onwards, MSD grant income was reduced significantly.

WelCAB Grant Income by Funder (2016-2018)



WelCAB Total Annual Grant Income (2009 - 2018)





# Current national funding model

***WelCAB has adopted a ‘local nationaliser’ funding model, but do not have the strategic relationships and local fundraising capability required to make this model successful in the long-term***

While this report is focused on WelCAB, when examining the funding model, it is necessary to consider the national organisational model as a whole as CABNZ distributes funding to local bureaux and holds funding relationships at a national level.

With reference to the ‘Ten Funding Models’ framework\* - CABNZ operate as a ‘Local Nationaliser’, where local bureaux generate the majority of funding and receive a small portion of funding from the national organisation. The table below provides a description of the key characteristics and critical success factors of ‘Local Nationaliser’.

	Local Nationaliser
<b>Funding source</b>	Mixed
<b>Funding decision-maker</b>	Few individuals / organisations
<b>Funding motivation</b>	Altruism and collective need
<b>Description</b>	These organisations focus on issues that are important to local communities across the country, where government alone can’t solve the problem. The majority of funding is raised locally. Limited funding may come from central government.
<b>Tactical tools</b>	<ul style="list-style-type: none"> <li>• Grants</li> <li>• Major gifts</li> <li>• Special events</li> </ul>
<b>Key success factors</b>	<ul style="list-style-type: none"> <li>• Mission resonates with local funders</li> <li>• Fundraising is considered a critical aspect of the organisation at every level and there is a need for local executive directors [or similar] to take ownership of attracting regional funding growth</li> </ul>

***CABNZ / WelCAB are not currently meeting the critical success factors of this model:***

- *At present, WelCAB does not appear to have a mission that resonates strongly with funders (as evidenced by the recent WCC funding review and this service review). From our stakeholder interviews, we believe this outcome is driven by: (1) a lack of awareness of the services and value provided by WelCAB and (2) an absence of strong strategic relationships with local funders (particularly WCC).*
- *There is a lack of dedicated local professional fundraising capability in WelCAB. This suggests a need to either address this particular gap or consider changes to the organisation’s long-term future funding model.*

\*Source: Foster, W. L., Kim, P. & Christiansen, B. (2009). Ten Nonprofit Funding Models. Stanford Social Innovation Review, Stanford Graduate School of Business.



# How does WelCAB fit into the national funding model?

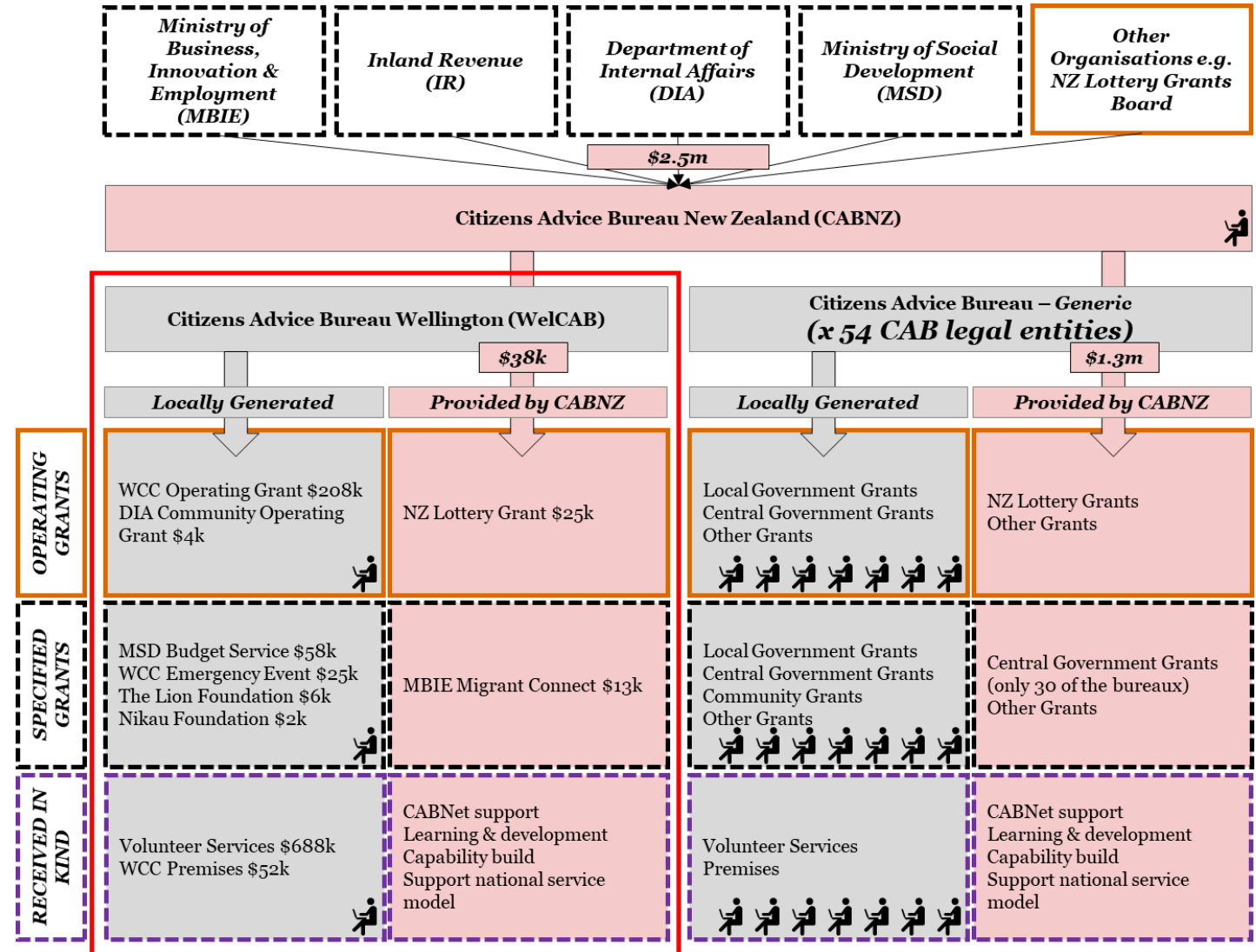
## Individual bureaux receive limited funding from the national model

The diagram to the right provides a visual depiction of CABNZ's current 'Local Nationaliser' funding model and how WelCAB fits into the model (as highlighted by the red box).

The diagram uses colour coding to identify different types of funding arrangements (operating and specified) and different sources of funding (locally generated or allocated by CABNZ).

The diagram shows that WelCAB organises the majority of its own funding and receives a small proportion of national funding from CABNZ (due to national funding needing to be distributed between 81 bureaux across the country). It also shows that WelCAB receive 3 different types of funding – operating grants, specified grants and goods/services received in kind. Finally, the diagram illustrates that WelCAB invests significant administrative effort to generate both operating and specified funding at a local level. Separate components of the model are explored in more detail on the following pages.

- Administrative effort
- Operating grant
- Specified grant
- Goods or services received in kind
- Locally generated operating grant
- Locally generated specified grant
- Allocated by CABNZ operating grant
- Allocated by CABNZ specified grant
- Local goods or services received in kind



Note: Financial amounts in this model relate to the year ended 30 June 2017

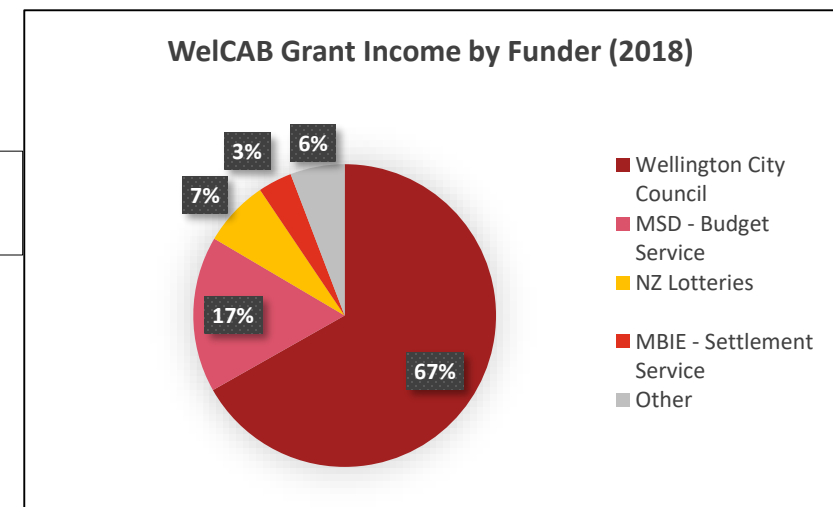
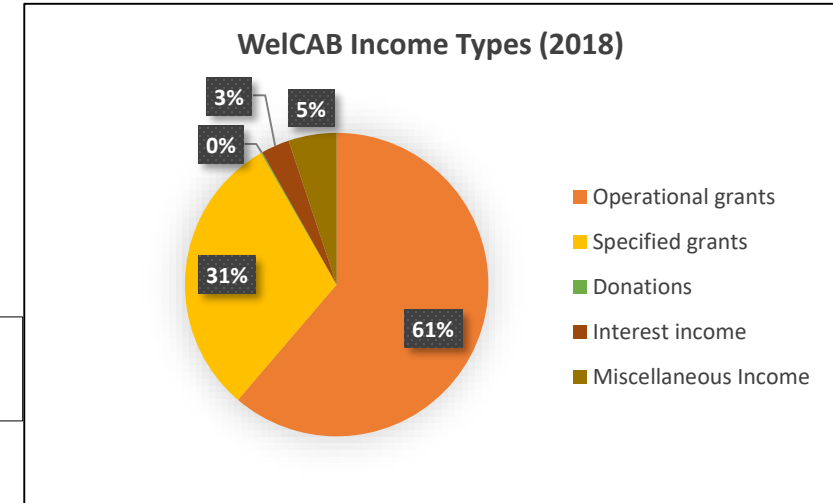




# Key characteristics of the current WelCAB funding model

*At 92% of total annual income, WelCAB relies almost entirely on grants to fund its operations and service delivery*

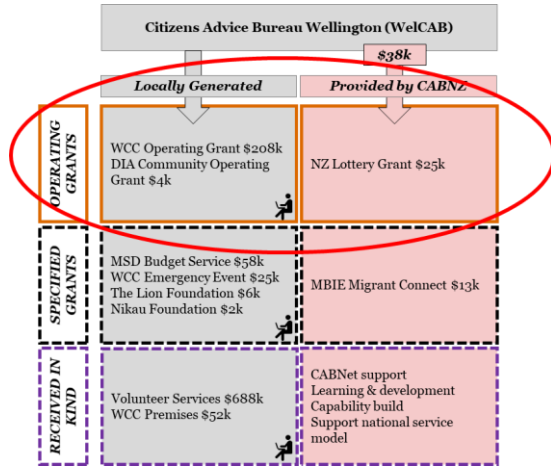
WelCAB Funding Model Characteristics	
<b>Funding model description</b>	WelCAB is part of a national organisation that focuses on issues that are important to local communities, where government alone can't solve underlying problems. Approximately ~60% of funding for the organisation as a collective is raised locally and the remaining ~40% raised by CABNZ (where the majority of national funding is sourced from central government).
<b>Funding source</b>	<p>92% of WelCAB's total annual income is sourced from grants. WelCAB receives 2 different types of grant income:</p> <ol style="list-style-type: none"> <li>Operational grants: Grants intended to fund operational expenditure such as wages and salaries of permanent staff members, normal operating administrative expenditure etc.</li> <li>Specified grants: Grants intended to fund a specific outcome, service or expenditure type. Examples include: funding received for the budget service, funding received to provide Wellington city with emergency event support etc.</li> </ol> <p>The remaining portion of income comes from interest (3%) and donations / miscellaneous (5%).</p>
<b>Funders</b>	<ul style="list-style-type: none"> <li>Wellington City Council (WCC)</li> <li>Ministry of Social Development (MSD)</li> <li>Ministry of Business, Innovation and Employment (MBIE)</li> <li>Department of Internal Affairs (DIA)</li> <li>NZ Lottery Grants Board</li> <li>The Lion Foundation</li> <li>Nikau Foundation</li> <li>Individual donors</li> </ul>
<b>Funding motivation</b>	<ul style="list-style-type: none"> <li>Altruism and achievement of social outcomes</li> <li>Collective need</li> </ul>
<b>Tactical tools</b>	<ul style="list-style-type: none"> <li>Grant applications</li> <li>Donations</li> </ul>





# WelCAB operating grants

**Providing 88% of total annual operating grant income, WelCAB are heavily reliant on WCC to fund its on-going operations**



Funder / Grant Name	Type of Grant	Type of Funder	Duration	Local or National	Grant value (2018)	Existing Relationship
<b>WCC Operational Grant</b>	Operational	Local government	3 years	Local generation	\$210,787	Long-term partnership
<b>DIA [via the Community Organisation Grants Scheme]</b>	Operational	Central government	1 year	Local generation	\$4,000	Long-term service funder
<b>NZ Lottery Grants Board</b>	Operational	Non-government organisation	1 year	National generation	\$25,000	Long-term funder

## WCC Operating Grant – Outcomes (per the most recent performance report):

- Provide a high quality free, confidential and impartial information, advice, support, advocacy and referral service
- WelCAB will look for opportunities to provide and promote its services to individuals with high needs, and in areas of greatest need as identified by WCC (currently Strathmore, Newtown, Linden and Grenada North)
- WelCAB will be an organisation that respects and reflects te reo Māori and tikanga Māori
- CAB is known as an organisation which welcomes and values diversity
- WelCAB data influences policies and programmes at a local level and WelCAB data assists CABNZ to influence policies and legislation at the national level
- WelCAB has an effective governance structure and sufficient funds to operate with enough in reserves to continue for 6 months if the primary funder withdrew funds

## Department of Internal Affairs – Community Organisation Grant Scheme – Inputs:

- Operational grant for managers' salaries, volunteer training costs and telecommunications

*Note: there is no contractual agreement as the application for funding is simply performed online.*

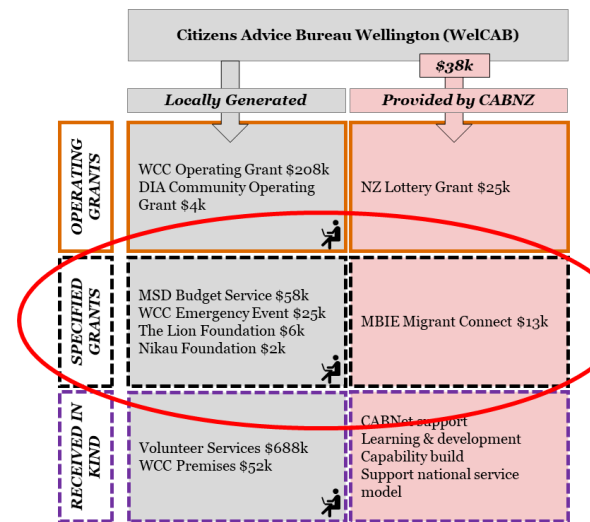
## NZ Lottery Grants Board – Allocation:

- The majority (74%) of the total grant is distributed across the 81 individual bureaux to fund the operational costs of providing CAB's core service
- Remaining portion of the grant (26%) is used to enable free access to CAB's 0800 number; support maintenance and development of cabinet; fund national service development and policy advice; and to provide support to individual bureaux



# WelCAB specified grants

*Providing 52% of total annual specified grant income, WelCAB are heavily reliant on MSD to fund specialist services*



Funder / Grant Name	Type of Grant	Type of Funder	Duration	Local or National	Grant value (2018)	Existing Relationship
<b>WCC – Emergency Event Support</b>	Specified	Local government	3 years	Local generation	\$25,000	Long-term partnership
<b>MSD – Budget Service</b>	Specified	Central government	2 years, 8 months	Local generation	\$58,852	Long-term service funder
<b>The Lion Foundation</b>	Specified	Non-government organisation	1 year	Local generation	\$6,000	Long-term funder
<b>Nikau Foundation</b>	Specified	Non-government organisation	1 year	Local generation	\$9,500	Long-term funder
<b>MBIE– Migrant Connect</b>	Specified	Central government	3 years	National generation	\$12,800	Long-term service funder

<p><b>MSD Budget Service – Service:</b></p> <p>Delivery of 1-on-1 financial mentoring and MoneyMates peer-led group support. For clients who are experiencing financial hardship, with the aim of enabling them to become more financially capable, gain control over their financial lives and make long-term change. Mentoring supports and empowers clients to identify their aspirations, and develop a strength based financial plan. MoneyMates enables clients to talk about and de-stigmatise financial hardship, while learning from others (there are numerous output measures).</p>	<p><b>WCC Emergency Event Support – Outcomes:</b></p> <p>To provide a dedicated support to deliver a program of work that will assist in the city’s emergency welfare response for people and animals during and after an emergency event.</p> <p><b>Lion Foundation – Allocation:</b></p> <ul style="list-style-type: none"> <li>Computers and annual audit fees</li> </ul> <p><b>Nikau Foundation – Allocation:</b></p> <ul style="list-style-type: none"> <li>General operating expenses (but cannot be used to purchase assets)</li> </ul>	<p><b>MBIE Face to face settlement information service (Migrant Connect) – Service and outcome:</b></p> <p>At a local level – the contract is funding the following service:</p> <ul style="list-style-type: none"> <li>Face-to-face settlement information service</li> <li>Workshops and/or seminars providing information for new migrants about aspects of living and working in New Zealand (including planning, organising and promoting)</li> <li>Regularly updated information about new or changed local services that are relevant to the needs of new migrants</li> </ul> <p><b>Stated outcome:</b></p> <p>Migrants make New Zealand their home, participate fully and contribute to all aspects of New Zealand life.</p>
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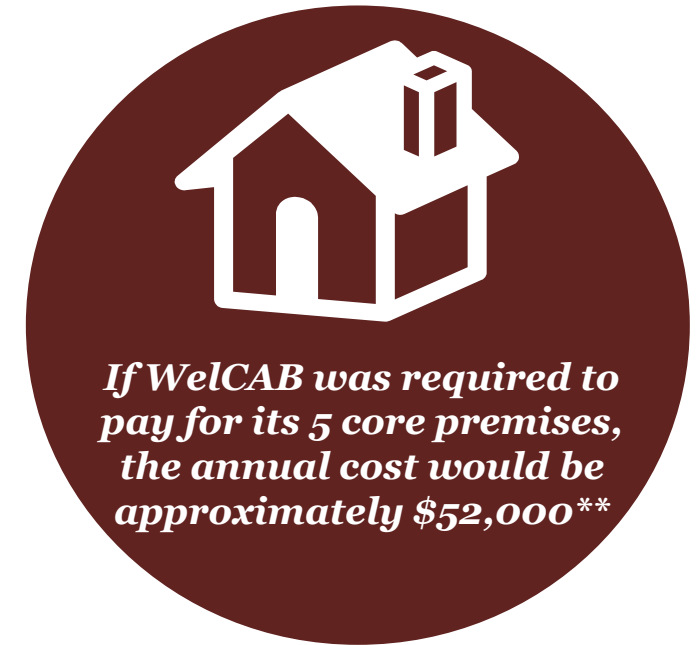
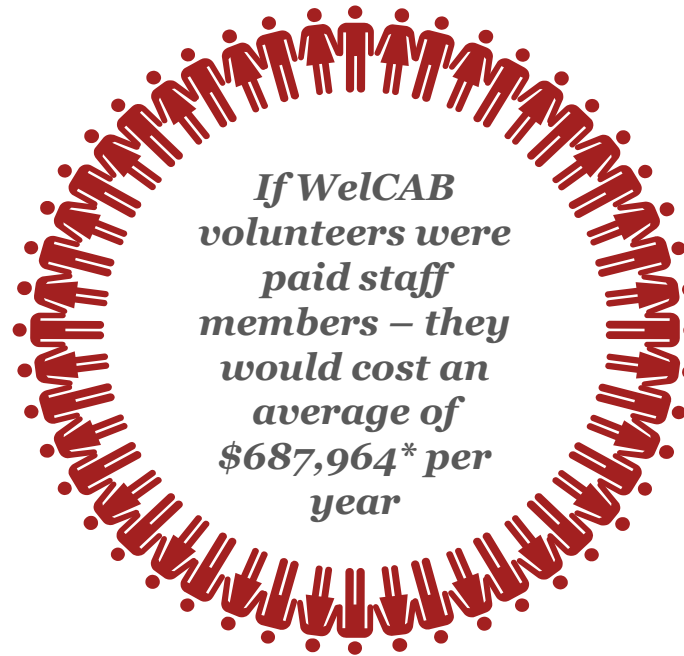
# Goods and services received in kind

## *WelCAB would be unable to deliver an effective service without the commitment of its skilled volunteer workforce and the premises provided by WCC*

WelCAB has a volunteer workforce of approximately 160 individuals (which equates to 12 FTE in 2016/17). While the volunteers are not paid for their time, WelCAB are reliant on these individuals to deliver frontline services. If WelCAB paid these individuals, the cost would amount to approximately **\$687,964 per year**. This represents a significant cost advantage to WelCAB, enabling it to deliver a high value, low cost service and achieve a high return on investment for WCC.

WelCAB's 5 core premises are provided by WCC free of charge (WelCAB are only required to contribute toward the cost of utilities). If WelCAB were required to pay rent for these premises, the cost would amount to approximately **\$52,000 per year**. WelCAB would be unable to deliver an effective service without free use of these premises as (1) the organisation would not be able to afford the cost without securing significant additional funding and (2) alternative premises may have a negative impact on accessibility for WelCAB's clients (this is especially true for WelCAB's 'flagship' location in the Wellington Library).

The criticality of these goods and services received in kind mean that they form an important part of WelCAB's funding model.



\*Calculation is based on the average number of volunteer hours per year (from 2009 to 2017) x an average wage of comparable Wellington-based roles at \$24.48 per hour

\*\*Calculation is based on the average office rental cost per square metre in Wellington (\$350) x estimated average property size (30 square metres) x 5 properties



# Current collection and use of information and insight

## *Cabnet contains a database of more than 4 million client enquiries – a rich source of data on social trends in New Zealand*

As mentioned on page 31, all CAB offices use a technology platform called ‘cabnet’, which is provided and maintained by the CABNZ national office. Launched in 2010, cabnet provides a portal and database to collect and store client information; a public-facing website; and an internal intranet.

With a knowledgebase of **~2,000 questions and answers**, a **directory of ~35,000 community organisations** and a **database of ~4 million client enquiries**, cabnet is used to:

- Empower the public to resolve their own problems
- Help CAB volunteers research information for clients, then record the interaction
- Help CAB managers create statistical reports to:
  - ✓ Understand where volunteers might need additional support
  - ✓ Provide funders and supporters with statistical information on numbers of enquiries, types of enquiries and client demographics (required for accountability and performance reporting)
- Help CAB researchers identify and investigate social issues and trends through analysis of client enquiries to:
  - ✓ Respond to requests from local and central government and engage in policy consultation
  - ✓ Highlight emerging social issues / problems through ‘spotlight’ reports
  - ✓ Provide valuable feedback to volunteers
  - ✓ Respond to ad hoc media requests

The type and use of WelCAB’s data and information is explored on the proceeding pages.



## **Cabnet upgrade**

As mentioned on page 31, CABNZ are currently upgrading cabnet, which is due to be completed in early 2019. As part of this upgrade, CABNZ is redesigning its website to make it simpler to use so that individuals can more easily find the information that they need. The new cabnet will be totally responsive and accessible from any modern browser and operating system. It will also better support volunteers through improved data entry and extraction functionality and enable more seamless interactions with clients.



# Current approach to data capture

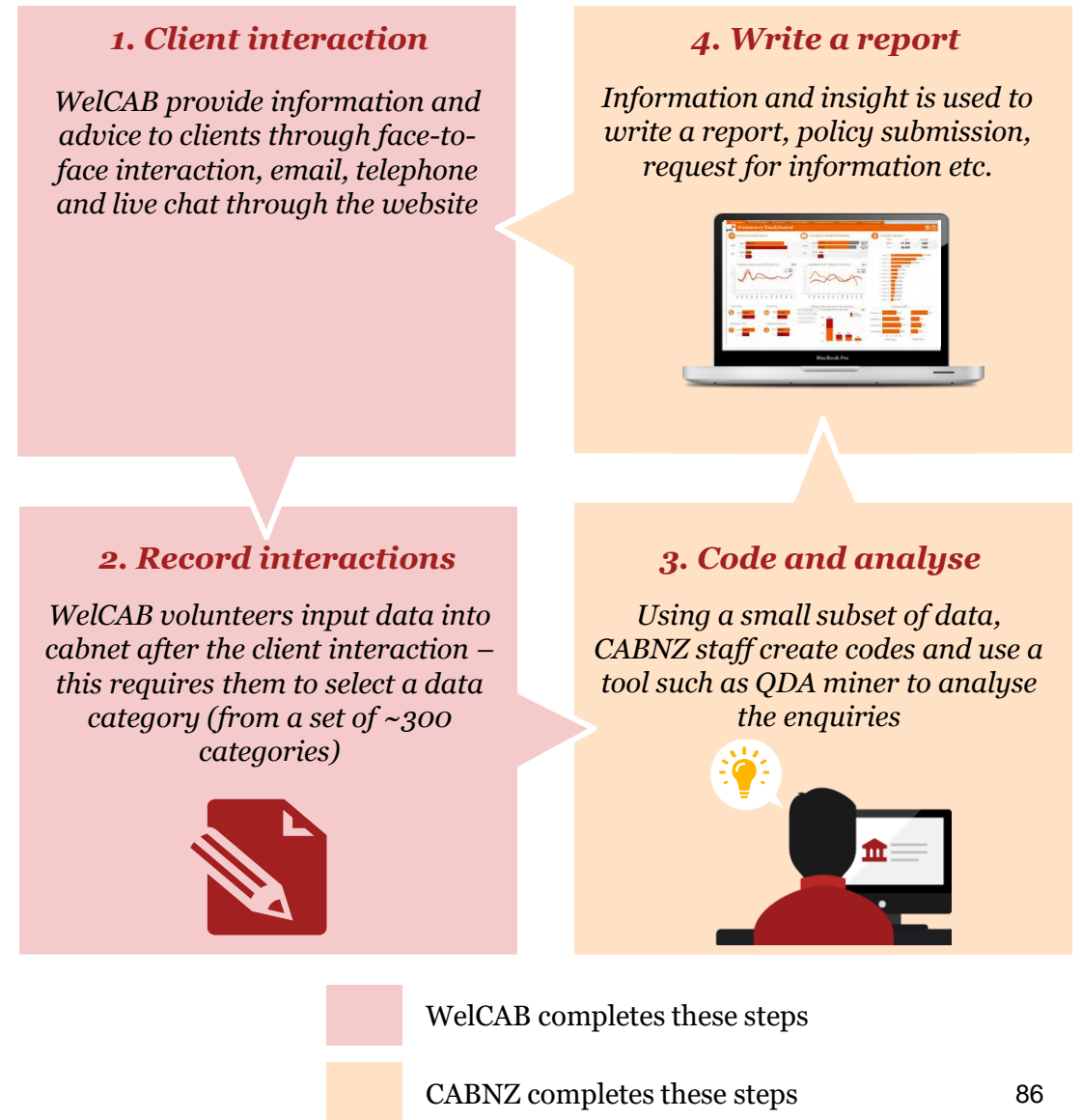
## *The process to capture, extract and analyse data is manual and time consuming*

WelCAB / CABNZ's current approach to data capture, extraction and analysis is summarised in the graphic to the right.

WelCAB / CABNZ take a rigorous approach to capturing information on client interactions and extract / analyse data where they have capacity to do so. CABNZ is currently exploring technology solutions to provide greater capacity for data analysis, as well as address the following risks associated with the current approach\*:

- **Human error** – potential for human error during the data input stage (when volunteers are required to choose a relevant category from the available ~300 categories). There is also a risk that volunteers revert to only using their 'known' data categories.
- **Sample bias** – risk of sample bias when selecting a subset of data to analyse.
- **Inconsistency** – risk of inconsistent approaches between different staff members as data is extracted and analysed manually.
- **Sample size** – risk that the selected subset of data [for analysis] is not representative of the complete data set [for the specific area of interest].
- **Inefficiency** – the manual approach toward data 'coding' and analysis is time consuming and repeated from scratch each time a new piece of analysis is performed.
- **Inaccuracy** – risk of inaccuracy due to manual data extraction and analysis.
- **Inflexibility** – the current process does not allow for flexibility i.e. if the 'exam question' changes during analysis, the whole process will need to start again.

\*PwC, CABNZ Prototype Build Report (2018)





# Type of data held by WelCAB

## ***WelCAB holds rich qualitative data on hard-to-serve and vulnerable populations that is difficult for others to collect***

Research indicates that more vulnerable people are harder to reach. As such, it is difficult to collect meaningful data and information on this population.

As shown below, WelCAB's unique service offering is able to lower some of the barriers that prevent government agencies and other organisations from reaching vulnerable people (identified to the right) – and in doing so, WelCAB is able to collect valuable qualitative information on these populations.

- **People go where they feel supported, loved and can get 'low-friction' help fast.** Vulnerable people are not at all discerning about service specialisation – they are more concerned about finding help from somewhere that is familiar and non-threatening and where service providers are supportive and understand their realities.

***WelCAB provide a supportive, independent, non-threatening and non-judgemental service.***

- **Many people reject mainstream government services.** This is because culturally or socially isolated people are not always part of the mainstream, and mainstream services often don't work well in communities where insider knowledge is required to engage effectively.

***WelCAB has a local presence with local volunteers who are more likely to have 'insider knowledge' about the local community.***

- **For many people services are inaccessible.** The reasons services are inaccessible include cultural incompatibility, transformation issues, cost and misunderstanding the connection between the problem (the need) and getting help (a possible solution).

***WelCAB offer a universal, free service that is available through a range of channels and languages.***

## ***What is the definition of vulnerable people\*?***

Vulnerable people tend to fall into 1 of 2 categories:

1. **Multiple disadvantages:** families who are disadvantaged in 3 or more of 8 life domains: education, health, income, housing, material well-being, employment, safety and social connectedness.
2. **Culturally or socially isolated:** people and populations who have a completely different cultural or social lens. These individuals may not understand social support systems in a way that allows them to manage well in NZ.

## ***Why are vulnerable people hard to reach\*?***

1. Some people hide when the going gets tough
2. A person can't learn or plan when they are in crisis
3. Living in crisis can become the norm
4. This group has a high exposure to violence
5. **People go to where they feel supported, loved and can get 'low-friction' help fast**
6. Providers of help and support in these communities are often culturally or socially isolated as well
7. **Many people reject mainstream, government services**
8. **For many people, services are inaccessible**



# WelCAB’s current use of data and information

## *WelCAB do not measure social outcomes or provide funders with information and insight on social issues and trends*

At a local Wellington level, WelCAB receives ~**33,000 enquiries each year** (see page 27 for a breakdown). With reference to the intended uses of cabinet presented on page 85, the table below presents an assessment of the way in which WelCAB currently uses cabinet and the data / information contained within. The analysis shows WelCAB do not currently (1) demonstrate the impact of services to social outcomes or (2) provide funders with information and insight on existing or emerging social trends / issues. The primary reason for this is a lack of local analytical capacity and capability.

Intended uses of cabinet data	Achieved by WelCAB?
Empower the public to resolve their own problems	<b>Yes</b> – Wellingtonians have access to the knowledgebase in cabinet
Help CAB volunteers research information for clients, then record the interaction	<b>Yes</b> – WelCAB volunteers have access to the knowledgebase in cabinet
Help CAB researchers identify and investigate social issues and trends through analysis of client enquiries to respond to ad hoc media requests	<b>Yes</b> – WelCAB responds to occasional ad hoc media enquiries directly, as well as through referrals from CABNZ
Help CAB managers create statistical reports to understand where volunteers might need additional support	<b>Partially</b> – WelCAB extract basic statistical data to understand and identify trends and increases in particular social issues – this is used to inform volunteer training requirements
Help CAB managers create statistical reports to provide funders and supporters with statistical information on numbers of enquiries, types of enquiries and client demographics (required for accountability and performance reporting)	<b>Partially</b> – WelCAB extract basic statistical data from cabinet for the purposes of completing performance / accountability reports – this data is input and output based and there is no linkage to social outcomes
Help CAB researchers identify and investigate social issues and trends through analysis of client enquiries to provide valuable feedback to volunteers	<b>No</b> – WelCAB does not have the capacity or capability to support enquiry into existing data to provide feedback to volunteers on issues and trends in Wellington that can in inform service delivery at a local and national level
Help CAB researchers identify and investigate social issues and trends through analysis of client enquiries to respond to requests from local and central government and engage in policy consultation	<b>No</b> – WelCAB do not provide WCC with information to influence or engage in local policy consultation
Help CAB researchers identify and investigate social issues and trends through analysis of client enquiries to highlight emerging social issues / problems through ‘spotlight’ reports	<b>No</b> – WelCAB do not proactively issue spotlight reports on emerging social issues / problems in the Wellington region, however they do contribute local data to national reports that have significance for the Wellington community

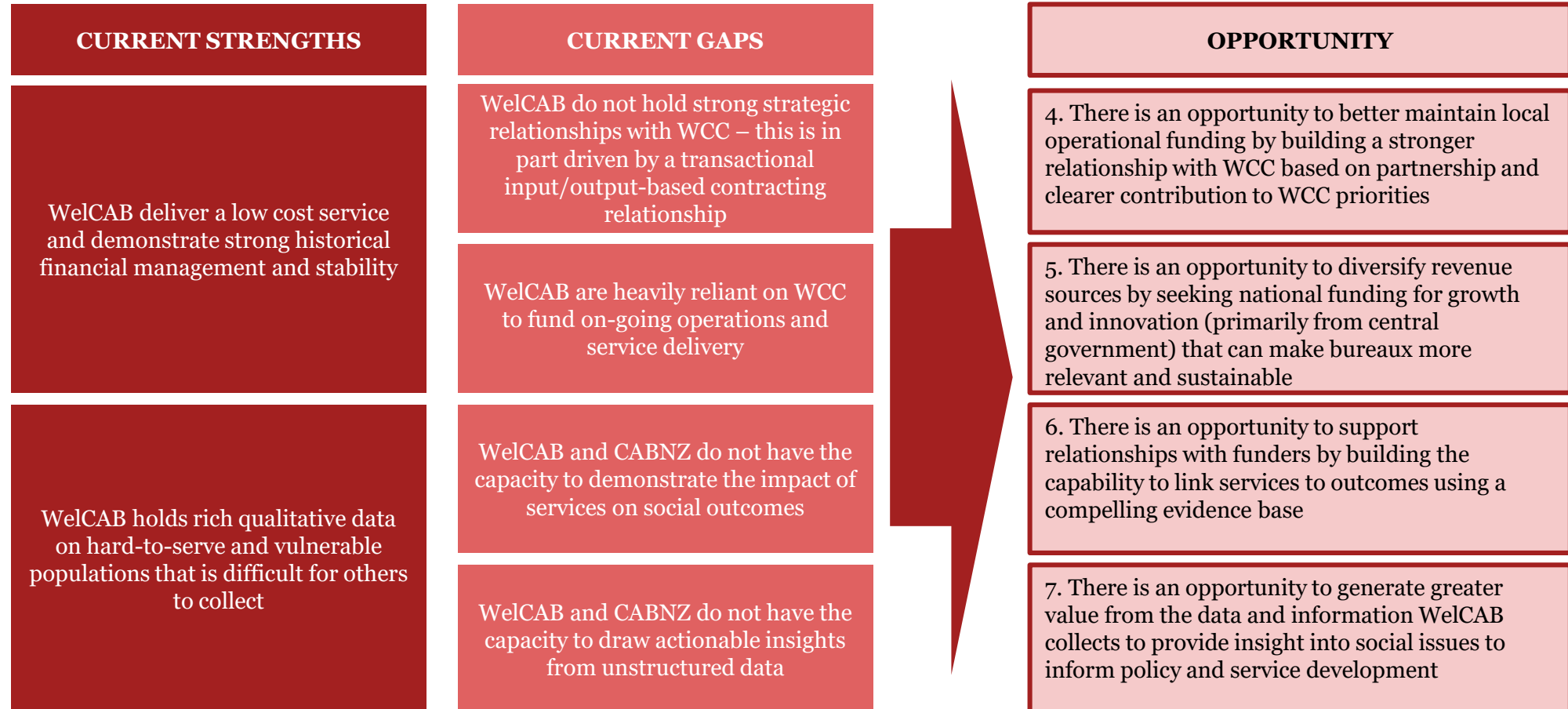




## F. Service funder future opportunities

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# Summary of funder current state observations and future opportunities





# Service funder opportunities and benefits

OPPORTUNITY	BENEFITS						
	Greater alignment with WCC priorities	Increased financial sustainability	Stronger relationship with WCC	Increased collaboration	Increased use of data and information	Increased adaptability to change	Services better aligned with customer needs
4. There is an opportunity to better maintain local operational funding by building a stronger relationship with WCC based on partnership and clearer contribution to WCC priorities	✓	✓	✓	✓			
5. There is an opportunity to diversify revenue sources by seeking national funding for growth and innovation that can make bureaux more relevant and sustainable		✓		✓		✓	
6. There is an opportunity to support relationships with funders by building the capability to link services to outcomes using a compelling evidence base	✓	✓	✓	✓	✓	✓	✓
7. There is an opportunity to generate greater value from the data and information WelCAB collects to provide insight into social issues to inform policy and service development	✓	✓	✓	✓	✓	✓	✓



## Opportunity 4: Relationship with WCC

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*There is an opportunity to better maintain local operational funding by building a stronger relationship with WCC based on partnership and clearer contribution to WCC priorities*



# How does WelCAB's relationship with WCC need to change?

*There is an opportunity to better maintain local operational funding by building a stronger relationship with WCC based on partnership and clearer contribution to WCC priorities*

**WelCAB do not hold strong strategic relationships with WCC – this is in part driven by a transactional input/output-based contracting relationship**

## *Keep doing...*

- Retain WelCAB's core mission, purpose and aims (as aligned to CABNZ as the national organisation)
- Retain WelCAB's independence

## *Do differently in the short term...*

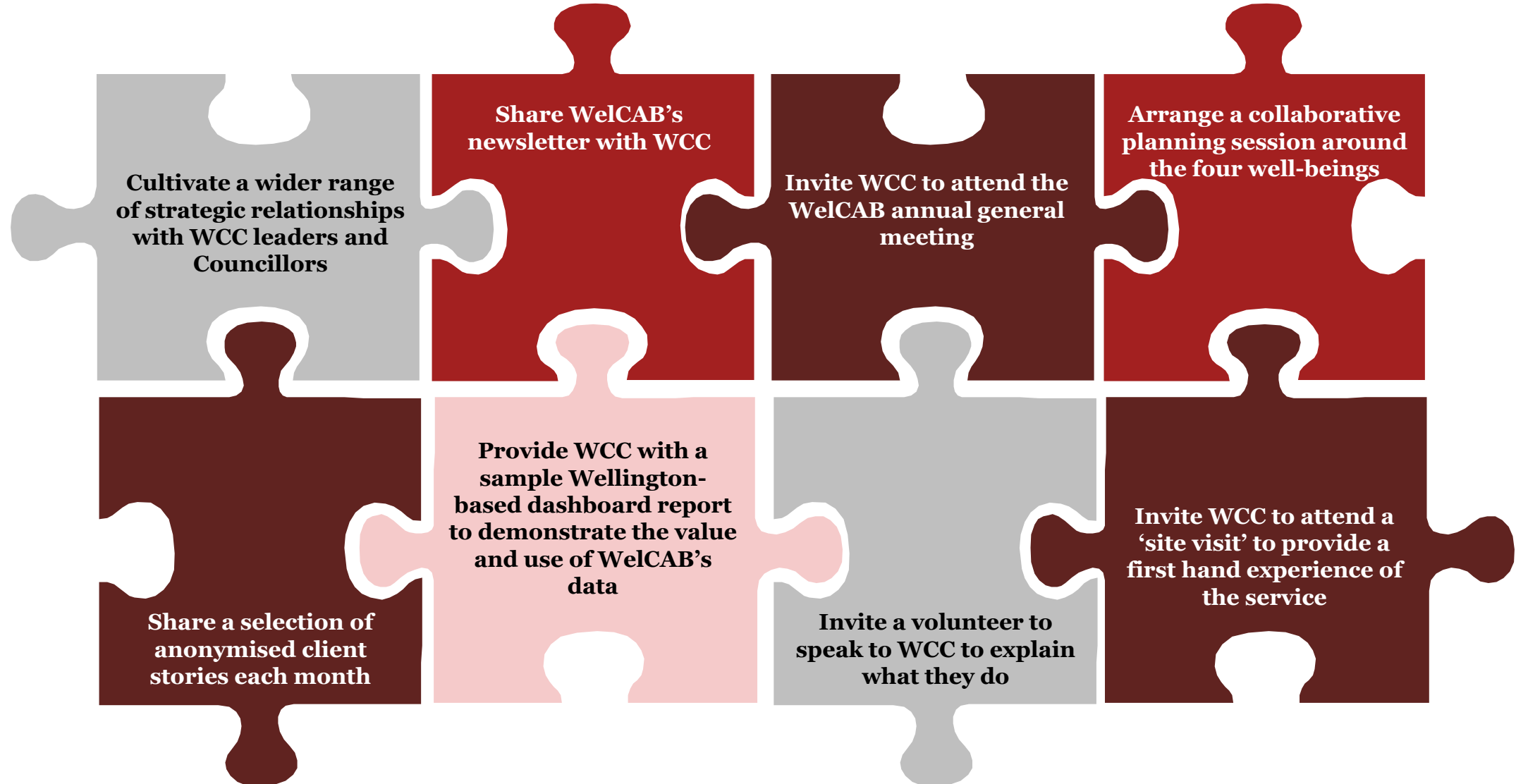
- Identify a set of easy and inexpensive 'quick wins' to improve the current relationship between WelCAB and WCC leaders and Councillors

## *Do differently in the long term...*

- Transform WelCAB and WCC's on-going operational relationship from a transactional input/output-based contractual relationship to a collaborative strategic partnership
- WelCAB and WCC should use a project specific partnering approach for future transformation projects

# Initiatives to improve WelCAB's relationship with WCC in the short term

*Identify a set of easy and inexpensive ways to improve the current relationship with WCC*





# Future project specific partnering

**WelCAB and WCC should use a project specific partnering approach for future transformation projects**

## Why?

- This approach will allow WCC and WelCAB to build strong joint ownership of the program's success and outcomes
- This approach will help to develop a stronger relationship between WCC and WelCAB
- This approach will utilise the knowledge, skills and insight of both parties – thus resulting in better outcomes for the program
- There will be clearly defined parameters and objectives for the program

## How?

The mechanism to manage the relationship will either be a contract or memorandum of understanding. Key characteristics of this arrangement are shown in the table to the right.

## What are the critical success factors of this approach?

- WCC and WelCAB will need to clearly define and agree on roles and responsibilities
- Both WCC and WelCAB will need to invest time and effort in developing collaborative skills and behaviours

### Case study: reducing homelessness in Stroud

Citizens Advice Stroud provides a housing-related debt advice service aimed at preventing homelessness. The service is funded by the council. In 2017/18 the anticipated cost of the specialist service was £38,000.

Performance targets require the service to assist 120 households per year. In a single quarter the service helped to avert homelessness for 60 clients. The services is estimated to bring an annual saving to the council of £562,000.

## Using a Project Specific Partnering Approach

<b>Vision, objectives and guiding principles</b>	WCC and WelCAB would work together to develop shared objectives and guiding principles for the project
<b>Planning</b>	WCC and WelCAB would perform tactical project planning together
<b>Governance and management</b>	WCC and WelCAB would retain separate 'business as usual' governance structures – but could set up a separate joint committee or management / working team for the specific project
<b>Funding and costs</b>	WCC would provide specific and discrete project-based funding
<b>Performance management and reporting</b>	Both WCC and WelCAB would work together to develop a project performance report (which will include both output and outcome measures as appropriate)
<b>Joint operating controls</b>	The focus would be on the performance of the project – rather than on WelCAB's individual performance
<b>Communication</b>	By working on a joint program, WCC and WelCAB would be required to communicate frequently – mostly on an informal basis
<b>Risk and reward sharing</b>	WCC and WelCAB would share the risks and rewards associated with the success of the project – WCC would likely bear the financial risk
<b>Data sharing</b>	WCC and WelCAB would share relevant data, information and insight at the outset of the project / program (to support the successful set-up and continued success of the project)



# What could WelCAB's long-term relationship with WCC look like?

*WelCAB and WCC should move toward forming a collaborative strategic partnership*

## **Why?**

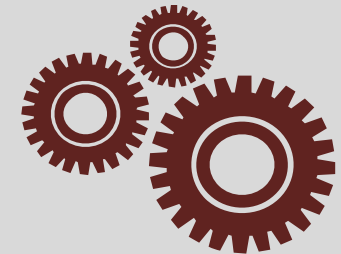
- Encourages a shared approach to planning and identification of strategic priorities
- Would provide long-term funding and partnership certainty for WelCAB
- Can build strong relationships based on mutual understanding
- Utilises knowledge and insight of both parties – thus resulting in better outcomes for the Wellington community
- Encourages sharing of data, information and insight
- Allows greater flexibility for both parties



## **How?**

A collaborative strategic partnership isn't typically governed by contract – rather, it uses the following mechanisms:

- Flexible deployment of skills / resources to meet 'solution goal'
- Clear accountability and responsibilities
- Agreement on shared / joint outcomes
- Joint planning and activities
- Joint delivery teams



## **What are the critical success factors?**

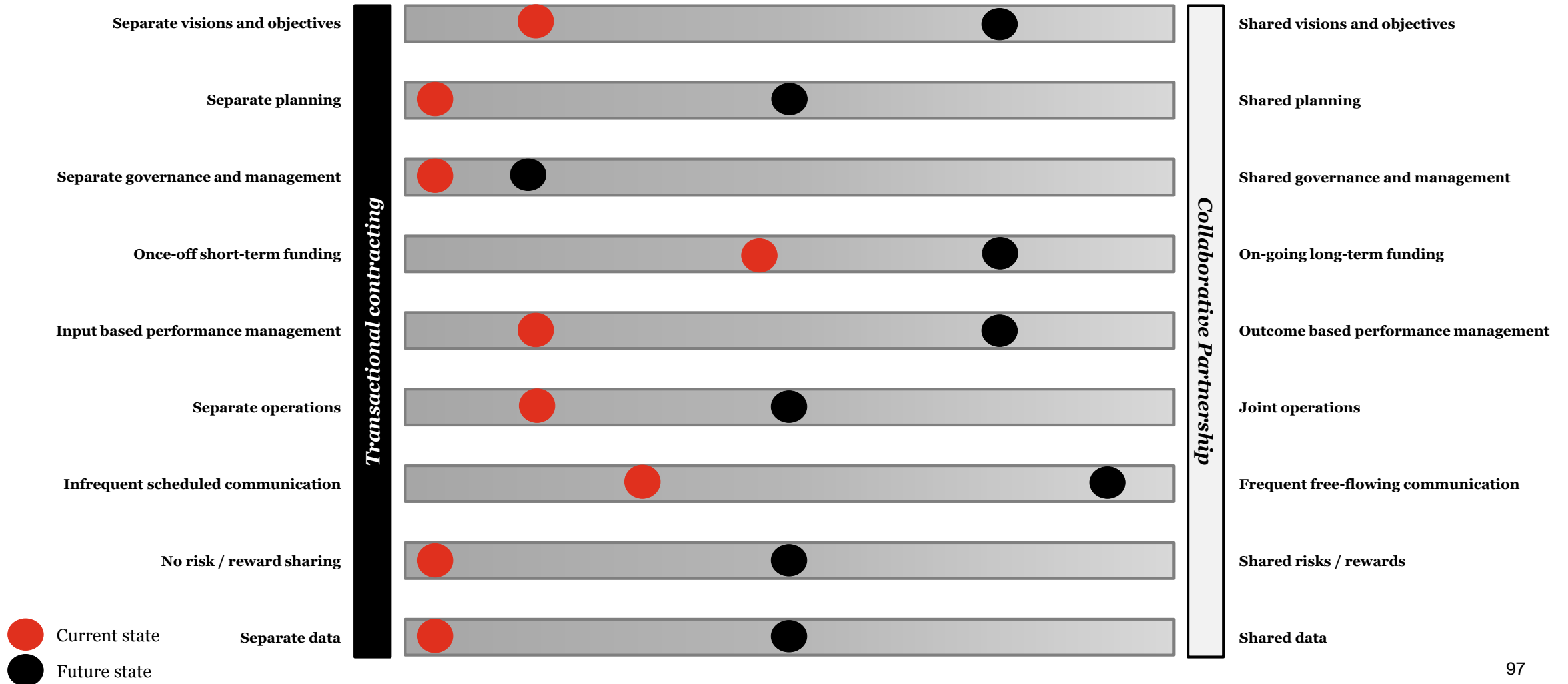
- Requires strong strategic alignment between both organisations – with common goals and mutual value creation
- Requires some form of shared governance or management e.g. working groups, committees etc.
- As the organisations still remain distinct, there is a need for clear roles and responsibilities
- Culture of trust and open honest communication
- Requires investment in collaborative skills and behaviours
- Absence of major conflict of role





# Key shifts required to move toward a collaborative strategic partnership

The sliding scale below provides suggestion of the type of key shifts that would be required to move away from the current transactional contracting approach toward a collaborative partnership. Both WelCAB and WCC would need to agree on the specific parameters / characteristics of the relationship as both organisations are likely to have slightly different requirements due to their own internal policies, structures and limitations.





# What would these shifts look like in practice?

**To move toward a collaborative partnership arrangement – WelCAB and WCC will need to make some practical changes**

WelCAB and WCC will retain separate governance and management structures – but could encourage a dual-management approach by forming a combined working group.

WelCAB and WCC retain their own distinct organisational strategies – but work together closely to develop a Wellington community development strategy (note: some other organisations might also be part of this process).

WelCAB and WCC will retain separate organisations and operations but may form a joint working group where operating performance measures are jointly developed and the focus is on joint performance.

WelCAB and WCC work together closely to develop plans to implement the Wellington community development strategy (note: some other organisations might also be part of this process).

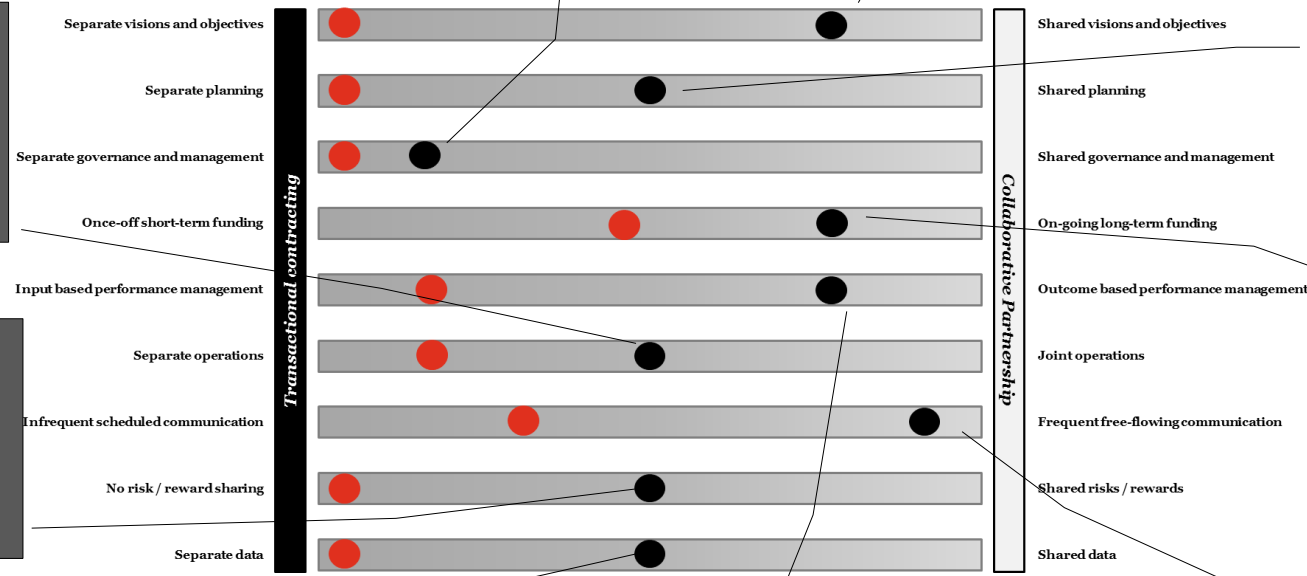
There is a higher tolerance for short term shared loss / challenges and a strong desire to help each other achieve success (jointly and separately).

WCC provide WelCAB with funding. WCC may wish to consider whether a 3-year funding agreement is a sufficient length to develop a strong collaborative strategic partnership – a 5 year term may be more conducive to such an arrangement.

Both WelCAB and WCC will share data, information and insight frequently – this will occur through routine channels (e.g. monthly flash reports) and non-routine channels (e.g. ad hoc conversation, emails etc.).

Performance management is centered around monitoring outcomes for shared objectives (developed through the shared planning approach). WelCAB will provide WCC with statistics on client interactions as part of on-going data sharing.

Non-routine communication is frequent, open, honest and occurs at all levels. Both WelCAB and WCC use the ‘same language’. Routine communication is open flow and often occurs through joint working arrangements (rather than being driven by contractual arrangements).





## Opportunity 5: Funding model

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*5. There is an opportunity to diversify revenue sources by seeking national funding for growth and innovation (primarily from central government) that can make bureaux more relevant and sustainable*



# How does the funding model need to change?

*There is an opportunity to diversify revenue sources by seeking national funding for growth and innovation (primarily from central government) that can make bureaux more relevant and sustainable*

## *Keep doing...*

## *Do differently in the short term...*

## *Do differently in the long term...*

**WelCAB are heavily  
reliant on WCC to fund  
on-going operations and  
service delivery**

- Continue prudent and strong financial management
- Retain local identity and funding sources
- Retain existing funding diversification by pursuing both operating and specified grants
- Retain the 'Local Nationaliser' funding model – which means the majority of funding is sourced locally (including premises)

- Take steps to strengthen the current 'Local Nationaliser' funding model by strengthening relationships with WCC, increasing awareness and leveraging volunteer capability

- Revise the organisational funding model to include new national funding streams from central Government for future growth, innovation and resilience



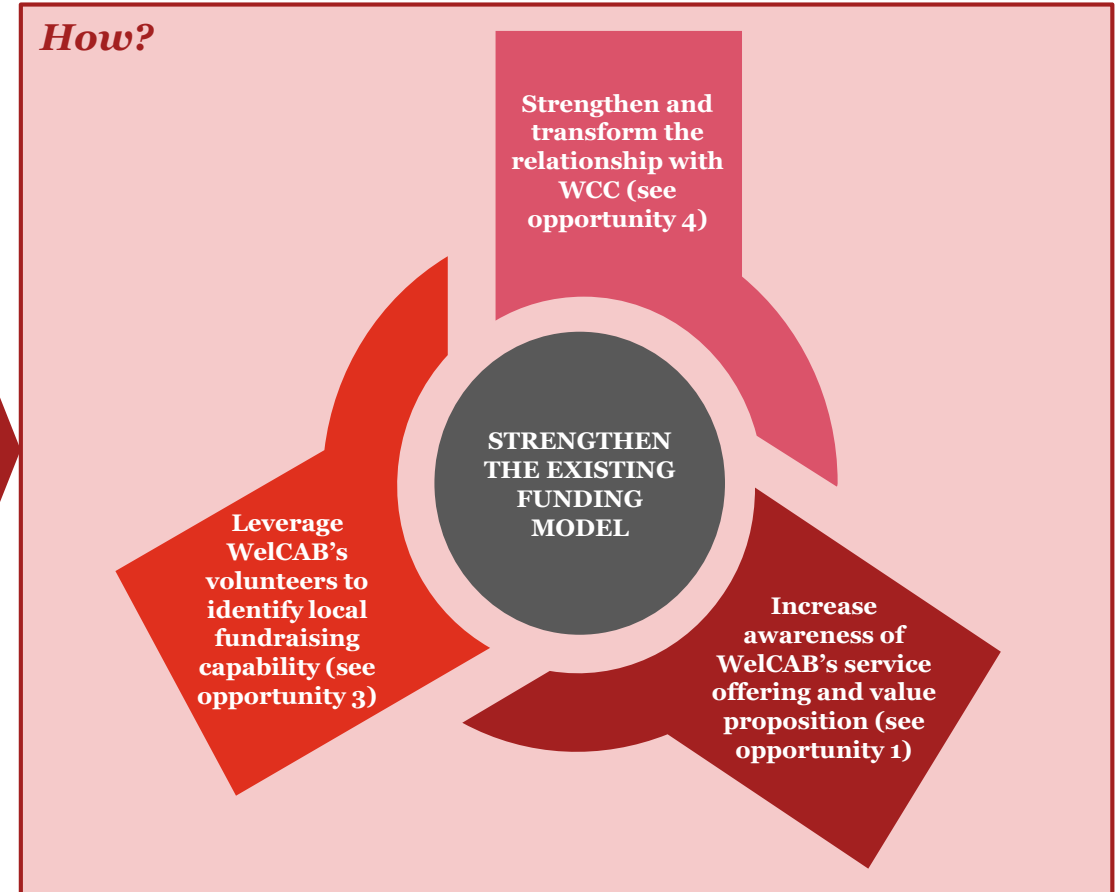
# Strengthen the existing 'National Localiser' funding model

*To continue reaching Wellington's vulnerable populations and delivering valuable local services, it is critical for WelCAB to retain a local identity and stable local funding*

## Why?

- **Local identity.** Maintaining local identity and funding is critical to ensure services are responsive to local needs and aligned to WCC priorities and the four well-beings.
- **Reaching vulnerable populations.** Research indicates that the long-term stability of an organisation's funding and funding model has a strong impact on its ability to engage effectively with hard-to-reach populations. This is because vulnerable people seek services that are comfortable and familiar – so a funding model that introduces service instability and risks staff turnover will fail to attract vulnerable populations\*.
- **Financial sustainability.** Obtaining operational and 'growth' funding from different sources (i.e. local and central government) will strengthen long-term financial sustainability.
- **Resilience.** It is unsustainable for the national body (CABNZ) to fill funding gaps at the local level – the organisation needs to be more resilient to potential fluctuations in local funding.
- **Fundraising capability.** WelCAB do not have the capability or resources to execute successful 'once-off' fundraising campaigns. This approach would be a second choice to obtaining stable local government funding.

## How?



*\*Source: N. Cortis, I. Katz and R. Patulny. (2009). Occasional paper no.26: Engaging hard-to-reach families and children. Australian Government, Department of Families, Housing, Community Services and Indigenous Affairs*



# What could the long-term funding model look like and why?





# How would the current funding model need to change?

*CABNZ / WelCAB should change the organisational funding model to a hybrid ‘Local Nationaliser’ + ‘Policy Innovator’*

	Policy Innovator
<b>Funding source</b>	Government (local and central)
<b>Funding decision-maker</b>	Policymakers
<b>Funding motivation</b>	Collective interest
<b>Implementation timeframe</b>	Long-term
<b>Description</b>	These organisations have <b>developed novel methods to address social issues</b> that are not clearly compatible with existing government funding programs. They have convinced government funders to support these alternative methods, usually by presenting their solutions as more effective and less expensive than existing programs.
<b>Key questions to test the ‘fit’ and suitability of each funding model</b>	<ul style="list-style-type: none"> <li>• Do we provide an innovative approach that surpasses the status quo (in impact and cost) and is compelling enough to attract government funders?</li> <li>• Can we provide government funders with evidence that our program works?</li> <li>• Are we willing and able to cultivate strong relationships with government decision makers who will advocate for change?</li> <li>• At this time are there sufficient pressures on government to overturn the status quo?</li> </ul>
<b>Tactical tools</b>	<ul style="list-style-type: none"> <li>• Legislative appropriation or earmark</li> <li>• Executive earmark</li> <li>• Government pilot project</li> </ul>
<b>Key success factors</b>	<ul style="list-style-type: none"> <li>• Organisation needs to deliver future innovation that is of value to government</li> <li>• Ability to demonstrate success of future innovation</li> <li>• Strong and trusted relationships with key government stakeholders and decision-makers</li> </ul>

## How can CABNZ / WelCAB demonstrate innovation?

- *By reaching vulnerable populations and individuals who are unable or unwilling to navigate government services*
- *By reaching vulnerable populations and individuals who are unable to navigate digital services*
- *Providing proactive timely information and insights on existing and emerging social issues and trends (both locally and nationally)*

## Why is this valuable to funders?

*This is valuable to funders as vulnerable populations are becoming increasingly difficult to reach and, as a consequence, funders are unable to collect valuable data and insight on these populations (to inform social policy and service design).*



# Alternative future funding model

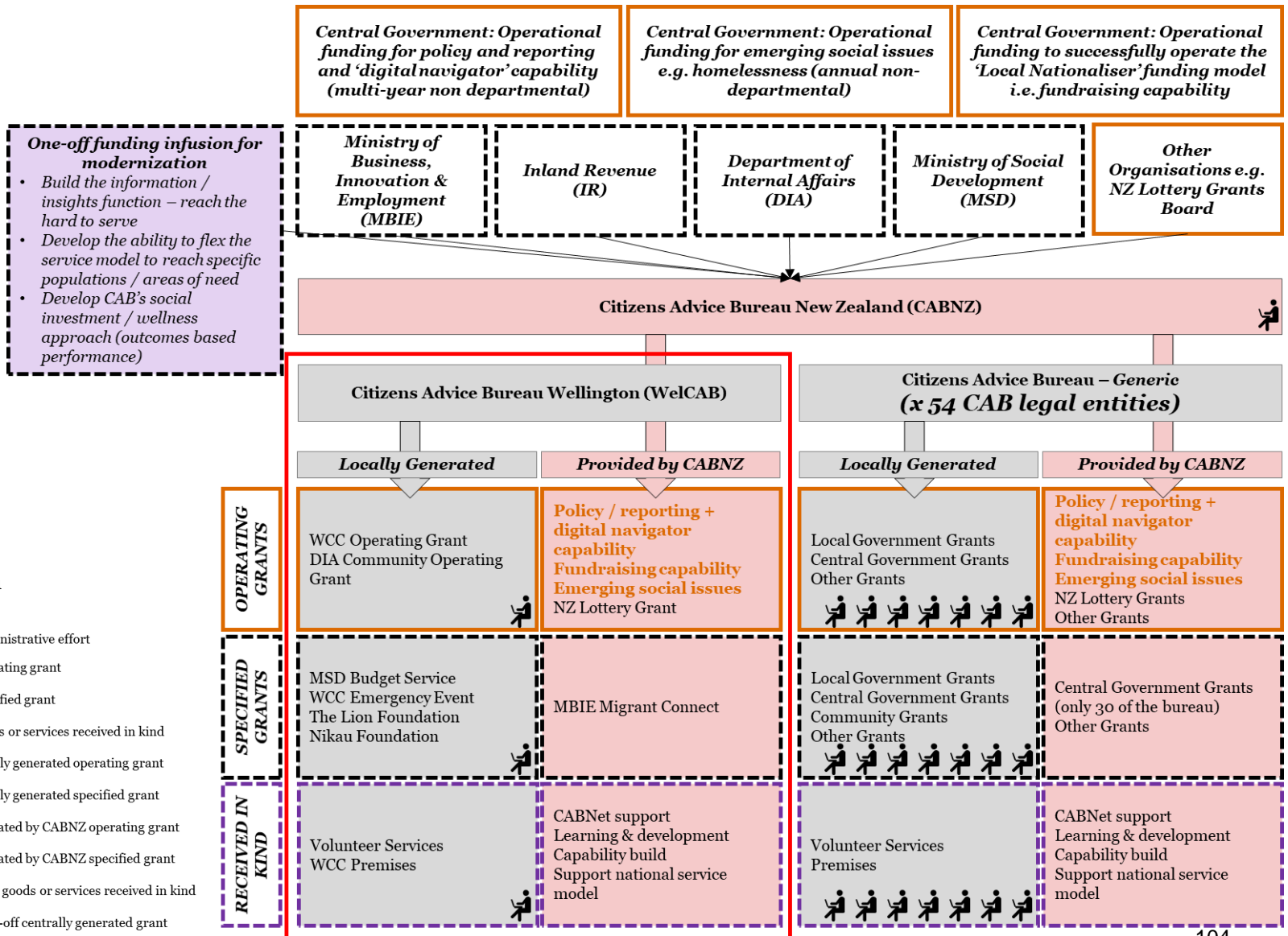
**Under a hybrid ‘Local Nationaliser’ + ‘Public Innovator’ model, WelCAB would continue to source the majority of funding locally – but would have greater access to national innovation funding from CABNZ**

The diagram to the right provides a visual depiction of CABNZ’s proposed long-term funding model (including WelCAB, which is highlighted by the red box).

The diagram uses colour coding to identify different types of funding arrangements (operating and specified) and different sources of funding (locally generated or allocated by CABNZ).

The additional **purple box** shows the proposed one-off specialised grant from central government for future innovation and modernization. The additional **orange boxes** show the proposed on-going operating grants from central government to cover the cost of introducing new capability.

To successfully move to this new hybrid funding model, CABNZ will need to strengthen relationships with senior government stakeholders and ministers. It will also need to develop a compelling case with evidence of how CABNZ will change and innovate in the future.



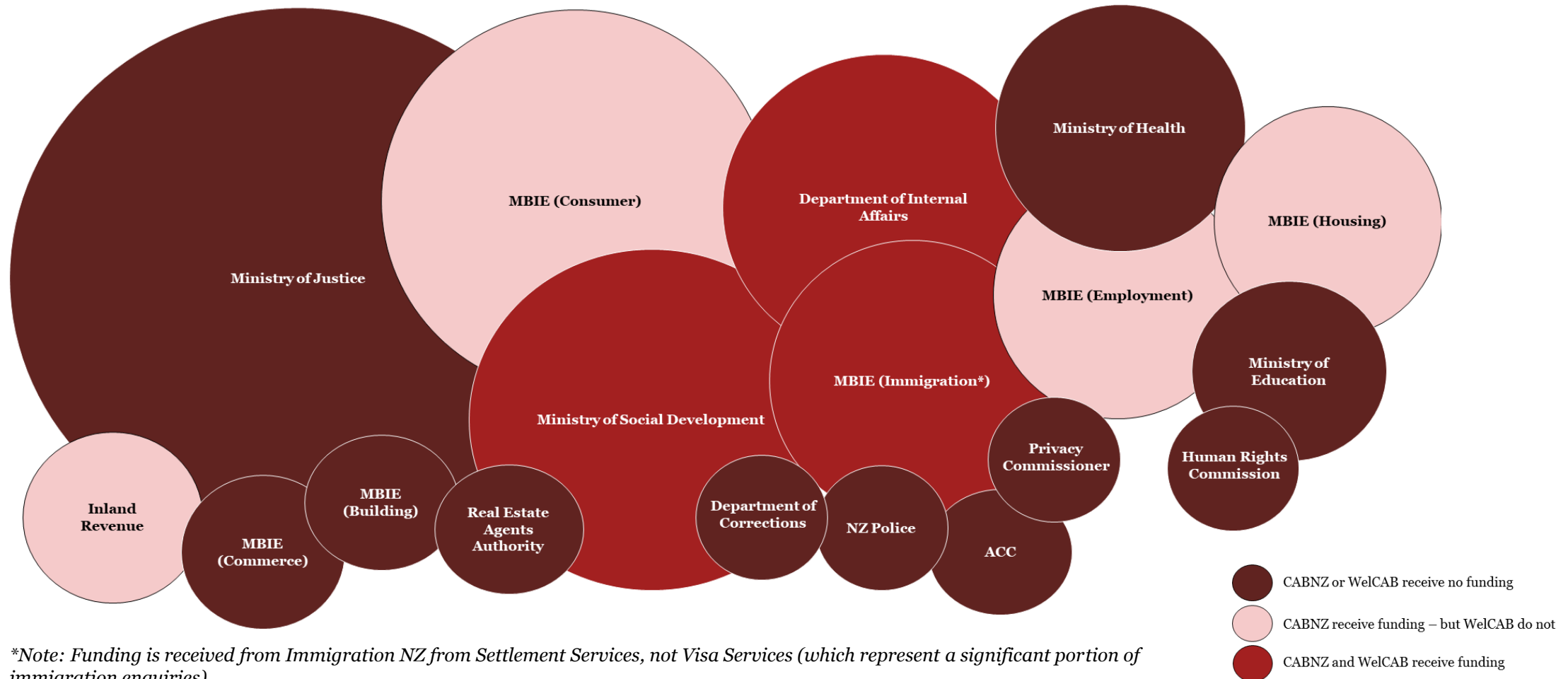




# Government agencies that could contribute to future funding

*There are a number of government agencies that refer clients to CAB but do not provide any funding*

The graphic below provides a visual depiction of all the government departments that refer clients to the CAB as compared to those that provide funding to the CAB. The size of each bubble provides a relative indication of the number of client enquiries CAB receive on the subject matter of the relevant government department.



*\*Note: Funding is received from Immigration NZ from Settlement Services, not Visa Services (which represent a significant portion of immigration enquiries)*



## Opportunity 6 & 7: Information and insight

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*There is an opportunity to support relationships with funders by building the capability to link services to outcomes using a compelling evidence base*

*There is an opportunity to generate greater value from the data and information WelCAB collects to provide insight into social issues to inform policy and service development*

# How does WelCAB's information and insight function need to change?

*There is an opportunity to generate greater value from the data and information WelCAB collects to provide insight into social issues to inform policy and service development*

## *Keep doing...*

## *Do differently in the short term...*

## *Do differently in the long term...*

**WelCAB and CABNZ do not have the capacity to demonstrate the impact of services on social outcomes**

**WelCAB and CABNZ do not have the capacity to draw actionable insights from unstructured data**

- Continue collecting rich qualitative data from client interactions
- Continue the existing program of work to upgrade cabinet
- Continue providing performance reporting to funders
- Continue providing analysis and spotlight reports on social issues using local data

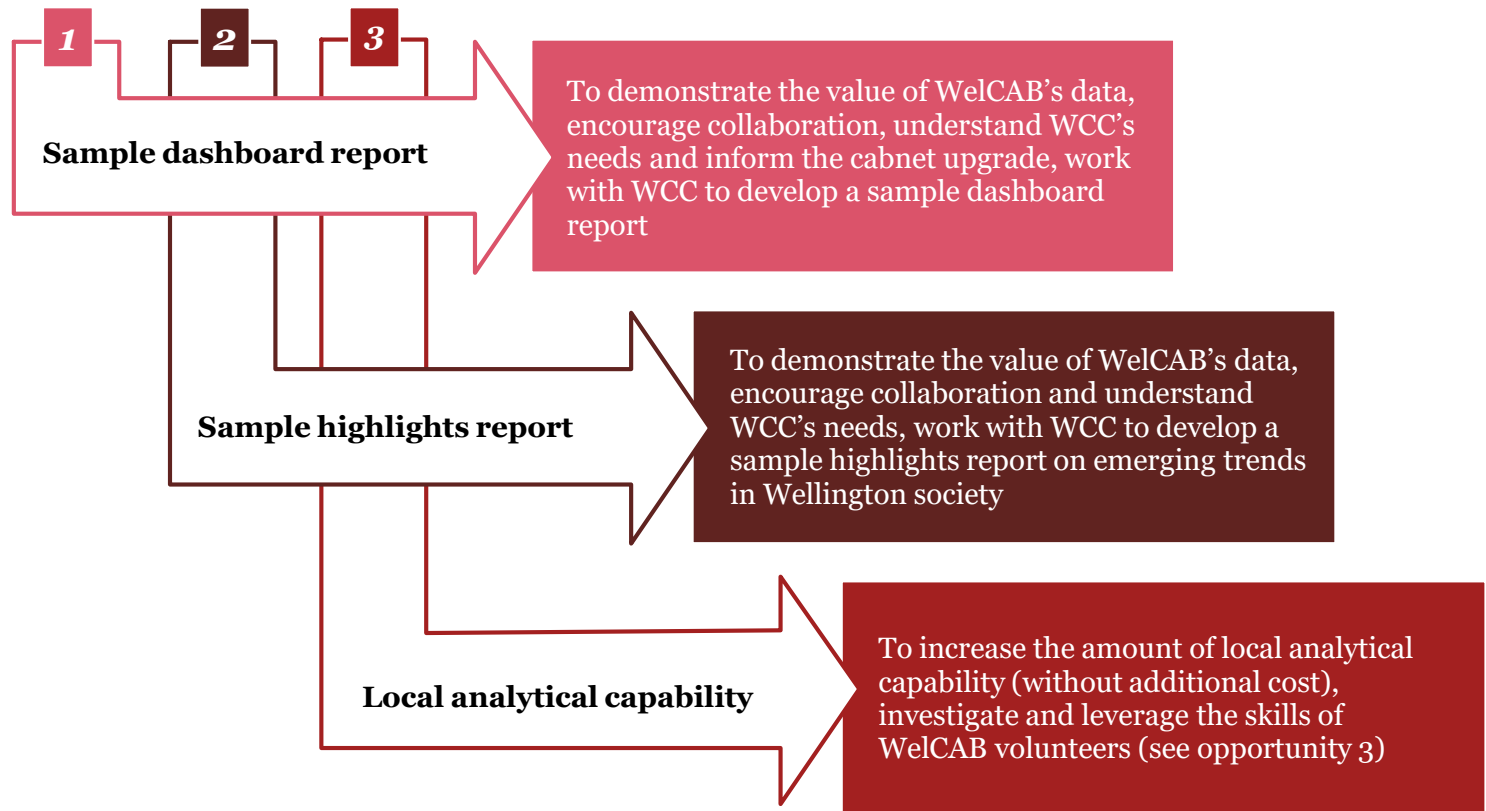
- Work with WCC to develop some sample reports for delivering insight (i.e. dashboard reporting and emerging social trends)
- Leverage volunteers to identify additional local analytical capability (see opportunity 3)

- Develop a national CABNZ information, insights and reporting function, to enable outcome-based performance measurement / reporting and proactive generation of insight (note: this will require implementation of the long-term hybrid funding model per opportunity 5).



# What can WelCAB do to improve data and insights now?

*By working with WCC to develop sample reports, WelCAB can demonstrate the value of its data, encourage collaboration and better understand WCC's needs*



## Case study – Citizens Advice Bureau UK



The Citizens Advice Bureau UK operate 3 interactive dashboards:

1. Advice trends dashboard – interactive, open to anyone and updated monthly. This dashboard reports non-consumer service issues that people ask the CAB about, and their demographics.
2. Case studies dashboard – open to government staff only. This dashboard includes powerful anonymised case studies that bring to life the breadth and intensity of users' journeys, in a way that cannot be achieved through government website and call centre reporting.
3. Consumer advice trends dashboard – interactive and open to anyone. This dashboard shows data from CABs specialist consumer and energy advice services.





# Link services to outcomes using a compelling evidence base

## *WelCAB can support relationships with funders by building capability to link services with social outcomes*

Within the New Zealand social services sector, there is an increasing move toward outcome-based contracting and performance measurement – where the benefits of measuring social impact include\*:

- **Knowing you are really making a difference.** To make it clear to clients, supporters, advocates, funders, employees and volunteers that services are achieving the mission and goals of the organisation and other identified priorities (such as contributing to the four well-beings or WCC priorities).
- **Building a better social purpose organisation.** Measuring outcomes helps to create a culture of learning and innovation, drive better and more meaningful communication and help create a reputation for transparency, trust, efficiency and sustainability. Measuring outcomes can also help organisations to appeal to funders and donors.
- **Accountability and increased efficiency.** The measurement of outcomes increases accountability to funders, donors and the public. It also helps funders to prioritise and assess the impact of their investment decisions.

At present, WelCAB / CABNZ are only able to measure inputs, activities and outputs. To strengthen and support relationships with funders, WelCAB / CABNZ should invest in analytical capability to enable outcome-based performance measurement and reporting (note: this recommendation is incorporated into the long-term view of CABNZ's information and insights function on the following page).



\***Source:** Muir, K. & Bennett, S. (2014). *The compass: Your guide to social impact measurement*. Sydney, Australia: The Centre for Social Impact.

## *Case study – Measuring the Outcomes from Citizens Advice (MOCA)*

MOCA is a partnership programme between Parkhead and other Citizens Advice Bureaux and Evaluation Support Scotland. Under this programme, the following outcomes were identified and measured:

### Outcomes from volunteering:

- We realise our full economic potential with more and better employment opportunities for our people.

### Outcomes from advice:

- We have improved life chances for children, young people and families at risk.
- Our children have the best start in life and are ready to succeed.
- We live longer, healthier lives.
- Our people are able to maintain their independence as they get older and are able to access appropriate support when they need it.

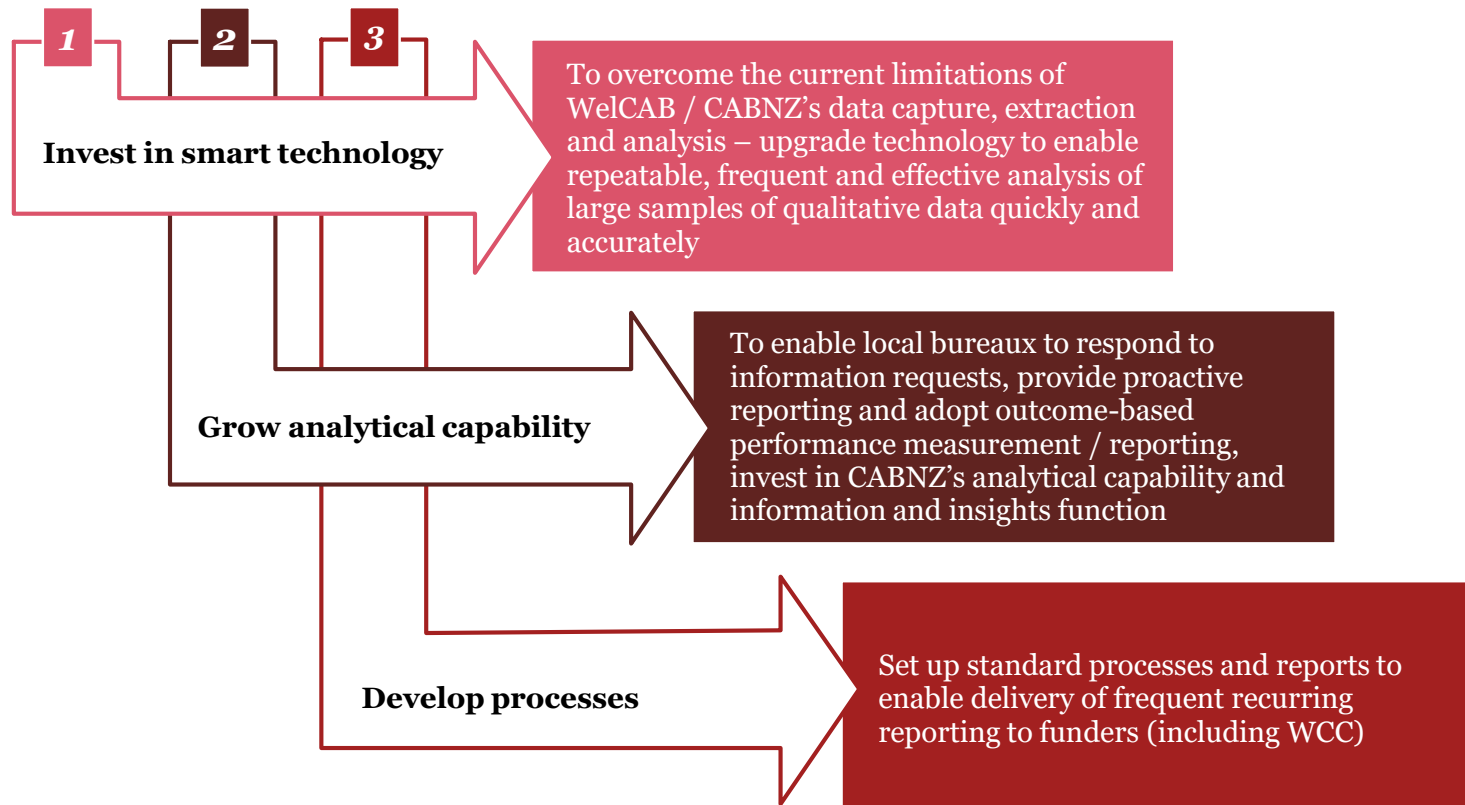
### Outcomes from social policy work:

- We live in well-designed sustainable places where we are able to access amenities and services we need.
- Our public services are high quality, continually improving, efficient and responsive to local people's needs.
- We have tackled the significant inequities in society.

**Source:** *Measuring Outcomes From Citizens Advice. Explaining, measuring and evidencing the difference our advice makes.* Evaluation Support Scotland and Citizens Advice Bureau.

# What could CABNZ's information and insights function look like in the future?

*To generate greater value from the information and data it collects, WelCAB / CABNZ will need to invest in the creation of a national information and insights function*



## *How will WelCAB / CABNZ fund this investment?*

As discussed on pages 100 to 105, it is recommended that WelCAB / CABNZ seek funding from central Government to fund future growth and innovation of the national organisation.

To achieve this, WelCAB / CABNZ will need to clearly demonstrate the value of a future information and insights function.

WelCAB / CABNZ's unique value proposition in this space is the organisation's ability to reach and collect data on vulnerable populations (as discussed on page 87).

In conjunction with stable funding, service promotion, client-centered services and appropriate outreach – other factors that enhance an organisation's ability to reach vulnerable populations include\*:

- delivering services via a non-profit auspice
- mixing specialist and generalist, targeted and universal services
- using single entry points for an array of coordinated services.

As such, WelCAB / CABNZ are well placed to reach vulnerable populations and thus secure funding to improve and grow the national information and insights function.

*\*Source: N. Cortis, I. Katz and R. Patulny. (2009). Occasional paper no.26: Engaging hard-to-reach families and children. Australian Government, Department of Families, Housing, Community Services and Indigenous Affairs*

# G. Roadmap and next steps

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# Immediate Next Steps

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## *WelCAB and WCC will need to work together to discuss and agree short-term next steps, priorities and actions*

In the immediate future, we recommend WelCAB and WCC work together to discuss and agree **short-term next steps, priorities and actions** before the April 2019 WCC Grants Committee meeting (where WelCAB will submit and present a funding application for the next two years). In this discussion, we suggest a focus on the following:

- Prioritisation / ranking of the critical ‘must do’ **short-term** recommendations, which should consider the objectives, expectations and constraints of both WelCAB and WCC (note: prioritisation could be performed against a matrix of impact vs. feasibility).
- Identifying those high priority ‘must do’ **short-term** recommendations that will require additional funding – and discussing whether these would fit into the long-term 2-3 year funding agreement or whether the initiative could potentially be delivered and funded through a project specific partnership approach.
- Framing up the funding application for the next 2-year period, including the nature of the contract (i.e. input vs. output).
- Framing up any applications for project-specific funding.

After the WCC Councillors have agreed the amount of funding for the next 2-year period, we recommend WelCAB and WCC work together to:

- Agree the nature of the relationship between WelCAB and WCC over the next 2-year period
- Agree specific contractual outcomes to be achieved by WelCAB.

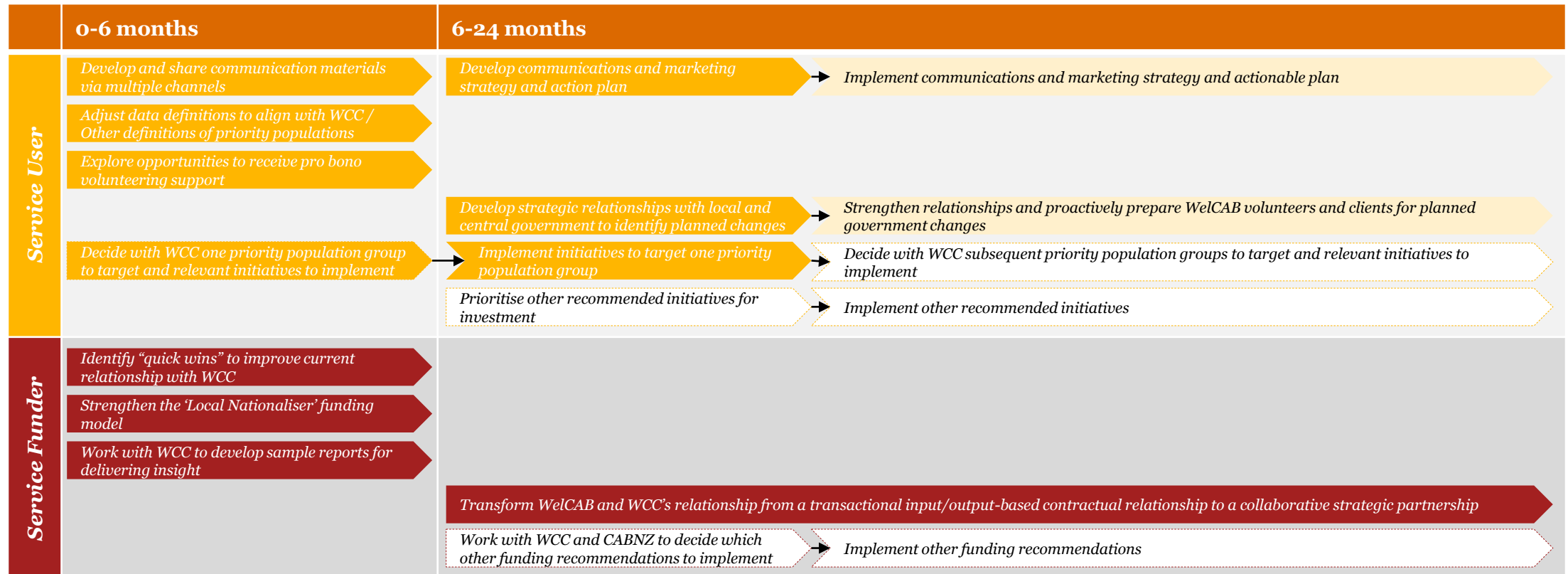


# High Level Roadmap

## *We recommend that WelCAB prioritises the ‘must do’ recommendations*

This review presents a comprehensive set of recommendations – noting that these are not currently funded. Within the set of recommendations we have identified a number of ‘must do’ recommendations that we believe are critical to WelCAB’s continued success and relevance.

An indicative timeline is presented below. The ‘must do’ recommendations are shown by the solid coloured chevrons and the additional recommendations by the white chevrons. This timeline is contingent on WelCAB successfully obtaining additional funding.



# H. Appendices

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- Appendix 1: Alternative future long-term funding model option – public provider*
- Appendix 2: Key components of the project terms of reference*
- Appendix 3: Interviewees and workshop attendees*

# Appendix 1: Alternative future long-term funding model option: Public provider

Below is a description of a another alternative long-term funding model that was considered for WelCAB / CABNZ. While this model has been successfully used for one funding contract in the Auckland region (see case study below), the model was not considered to be a viable alternative for the organisation as a whole as it would subject CAB to greater financial risk and uncertainty through service demand fluctuation and it would require significant additional resource to administer the contract (i.e. detailed and accurate recording and reporting of the number and nature of client enquiries, which would be subject to frequent audit / check by the funders).

	Public Provider
<b>Funding source</b>	Government (local and central)
<b>Funding decision-maker</b>	Administrators
<b>Funding motivation</b>	Collective interest
<b>Implementation timeframe</b>	Long-term
<b>Description</b>	These organisations work with government to provide <b>essential core social services</b> , for which government has previously defined and allocated funding. In some cases, government outsources the service delivery function but establishes specific requirements for not-for-profits to receive funding. Public providers often seek other funding sources to supplement their funding base.
<b>Key questions to test the ‘fit’ and suitability of each funding model</b>	<ul style="list-style-type: none"> <li>• Is our mission / service a natural match with one or more large pre-existing government programs?</li> <li>• Can we demonstrate that our organisation will do a better job than our competitors?</li> <li>• Are we willing to take the time to secure contract renewals on a regular basis?</li> </ul>
<b>Tactical tools</b>	<ul style="list-style-type: none"> <li>• Government contracts</li> <li>• Other supplemental funding e.g. grants</li> </ul>
<b>Key success factors</b>	<ul style="list-style-type: none"> <li>• Service provided aligns strongly with government priorities</li> <li>• Can deliver a more effective service than government or other providers</li> </ul>

*An example of where this model has been successfully used within CAB is the **Citizens Support Fund**, which is a fund provided by MSD to benefit advocacy organisations in the Auckland region. Under the funding contract, MSD provide a fixed amount per client interaction where citizens choose to access support services from CAB rather than directly from the government agency, Work and Income New Zealand (WINZ).*







**Source:** W. L. Foster, P. Kim and B. Christiansen. (2009). *Ten Nonprofit Funding Models*. Stanford Social Innovation Review, Stanford Graduate School of Business

# Appendix 2: Key components of the project terms of reference

## Goals






This section provides a set of clear and concise statements on the project's purpose and intended results.

The goals of the project are to:

- Articulate WelCAB's value proposition to its clients and funders. 
- Assess whether WelCAB's value proposition meets the needs of target Wellington communities and WCC's strategic priorities. 
- Identify opportunities to enhance the WelCAB service model to improve its effectiveness in meeting the needs of target Wellington communities and WCC's strategic priorities. 
- Identify opportunities for cooperation and collaboration with other Wellington community groups and service providers. 
- Identify options to improve the future financial sustainability of WelCAB. 
- Identify a relationship model that maximises value for both WelCAB and WCC (including how to set appropriate outcomes / funding to support the relationship). 

## Success Measures

This section provides statements about the impact the project must have on those outside the project for it to be considered successful. The success measures are:

- Shared understanding of WelCAB's value proposition. 
- Shared understanding of opportunities to enhance WelCAB's service model that might strengthen its value proposition to better meet the needs of target Wellington communities and improve its ability to deliver against WCC's strategic priorities. 
- Shared understanding of how WelCAB could further develop and leverage collaborative relationships in the Wellington community services sector. 
- Clear understanding of WelCAB's future funding needs and identification of different future funding options to improve future financial sustainability. 
- WelCAB and WCC have clarified their partnership model. 

# Appendix 3: Interviewees and workshop attendees (1 of 3)

## Interviewees

Name	Role	Organisation
<b>Kerry Dalton</b>	Chief Executive Officer	Citizens Advice Bureaux New Zealand
<b>Sacha Green</b>	National Advisor – Legal and Strategic	Citizens Advice Bureaux New Zealand
<b>Lucy Trevelyan</b>	Area Manager	Citizens Advice Bureau Wellington
<b>Stephen McArthur</b>	Manager Community Networks	Wellington City Council
<b>Jenny Rains</b>	Community Services Manager and Emergency Welfare Manager	Wellington City Council
<b>Brian Dawson</b>	Councillor	Wellington City Council
<b>Aileen Davidson</b>	Manager Programmes	Volunteering Wellington
<b>Liz McPherson</b>	Chief Executive Officer	Stats New Zealand
<b>Colin McDonald</b>	<i>Previous Chief Executive Officer</i>	Department of Internal Affairs
<b>Paul Eagle</b>	Member of Parliament - Rongotai	Central Government
<b>Colin Dale</b>	<i>Retired</i>	Local Government NZ
<b>Sonya Heenan</b>	Team Lead – Community Compliance	Inland Revenue
<b>Derek Osborn</b>	Area Manager	Housing New Zealand
<b>Janice Coldicott</b>	Team Leader – Refugee Resettlement	Red Cross New Zealand

# Appendix 3: Interviewees and workshop attendees (2 of 3)

## *Workshop attendees: Validation workshop*

Name	Role	Organisation
<b>Kerry Dalton</b>	Chief Executive Officer	Citizens Advice Bureaux New Zealand
<b>Sacha Green</b>	National Advisor – Legal and Strategic	Citizens Advice Bureaux New Zealand
<b>Lucy Trevelyan</b>	Area Manager	Citizens Advice Bureau Wellington
<b>Stephen McArthur</b>	Manager Community Networks	Wellington City Council
<b>Jenny Rains</b>	Community Services Manager and Emergency Welfare Manager	Wellington City Council

# Appendix 3: Interviewees and workshop attendees (3 of 3)

## Workshop attendees: WelCAB Board and Managers feedback workshop

Name	Role	Organisation
<b>Lucy Trevelyan</b>	Area Manager	Citizens Advice Bureau Wellington
<b>Mike Regan</b>	Board Chair	Citizens Advice Bureau Wellington
<b>Sushila Kumar</b>	Board Member	Citizens Advice Bureau Wellington
<b>Robyn Rendal</b>	Board Member	Citizens Advice Bureau Wellington
<b>Manjit Grewal</b>	Board Member	Citizens Advice Bureau Wellington
<b>Christine Ritchie</b>	Board Member	Citizens Advice Bureau Wellington
<b>David Cameron</b>	Deputy Board Member	Citizens Advice Bureau Wellington
<b>Jane Julian</b>	Deputy Board Member	Citizens Advice Bureau Wellington
<b>Joan Begg</b>	Deputy Board Member	Citizens Advice Bureau Wellington
<b>Mary Chesterfield</b>	Deputy Board Member	Citizens Advice Bureau Wellington
<b>Audrey Fell-Smith</b>	Service Manager – Wellington Central	Citizens Advice Bureau Wellington
<b>Gaynor Gastmeier</b>	Service Manager – Eastern Suburbs	Citizens Advice Bureau Wellington
<b>Juliane Tandy</b>	Service Manager – Wellington West	Citizens Advice Bureau Wellington
<b>Christine Coshan</b>	Information Officer	Citizens Advice Bureau Wellington
<b>Henry Yeoh</b>	Budget Service Manager	Citizens Advice Bureau Wellington

# I. Disclaimer

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# Disclaimer

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