

Voice



A magazine for the Citizens Advice Network in Scotland

AUTUMN 2023

A photograph of a middle-aged man with glasses, wearing a dark suit, white shirt, and a patterned red tie. He is speaking at a podium with two microphones. The background is slightly blurred, showing a blue logo on a wall.

Together again

Confronting big challenges at the network conference

On the road

Bureau reaches out to far-flung villages

Language barrier

Supporting clients with communication issues

Facing up to our challenges

September saw people from the network across Scotland gather in person for the first time since the spring of 2020.



‘Our Network, Our Future, Our Success’ was the theme of the annual conference, held in Cumbernauld. While celebrating the network’s achievements through recent national crises, the event also faced the network’s current challenges head-on.

As CAS CEO Derek Mitchell told the delegates: “There is no capability issue in our network... but we do face capacity challenges.” Workshops were devoted to practical solutions, as explored on pages 7-9.

The conference also saw a new chair appointed to the network – we find out what makes him tick on pages 10-11.

Elsewhere, we focus on new initiatives and ways of working adopted by bureaux, despite current pressures, to make their services even more responsive.

Cover image shows former Deputy First Minister, John Swinney, delivering a keynote speech at the conference.



Keep in touch at **voice@cas.org.uk**

to respond to articles, suggest new ideas, or share how your bureau or service is innovating to respond to clients’ needs.

Listen up

As a speech and language therapist for 40 years, Janet Scott worked with clients living with conditions such as cerebral palsy and motor neurone disease.



Janet Scott

“They would tell me about some of the difficulties they had making themselves understood in shops and as consumers,” she says.

Now retired, Janet has been a volunteer with Drumchapel CAB for five years – and she began to notice an odd gap in the bureau’s client base.

“I felt there was probably an under-representation of clients with communication difficulties making use of Drumchapel, and probably other bureaux,” she says.

Browsing the website of Communication Access – a charity that offers free training and standards on supporting people with communication difficulties – Janet noticed that the only accredited Scottish organisations were disability bodies and Jobcentres. She suggested to bureau staff that Drumchapel sign up.



Fiona Temple

Scotland's first 'communication-accessible' bureau is making it easier for anyone to have their voice heard.



Awareness training

The idea met with instant enthusiasm from session supervisor Fiona Temple, and learning and development coordinator Gillian Pollock.

Gaining accreditation meant taking stock of the bureau environment, procedures and paperwork. All 20 staff and 38 volunteers also had to go through the four modules of awareness training provided by Communication Access.

The materials offer insight on interacting with people who have speech difficulties, problems processing information, or difficulties with reading and writing – for reasons that might range from hearing difficulties or autism to a history of stroke.



Gillian Pollock

Accreditation took just a couple of months. The bureau is now able to advertise itself as 'communication-accessible' in its advertising and social media.

That's just the start of the process, however – and it has acted as a trigger for new issues to be raised.

Extended interviews

"We're now reviewing all our documents to make sure they're simpler," Fiona says. "It extends to

English as a second language too. For instance, we've had feedback that even interpreters find phrases like 'household status' hard to understand.

"We're next door to a centre for young adults with communication needs, and also a day centre for older people – so we've been able to tap in to their suggestions."

One critical change is revising the triage form, so that any extra communication needs are flagged up from the outset. "It means we can extend the interview slot, if needed, so advisers don't feel under pressure to rush things," says Gillian.

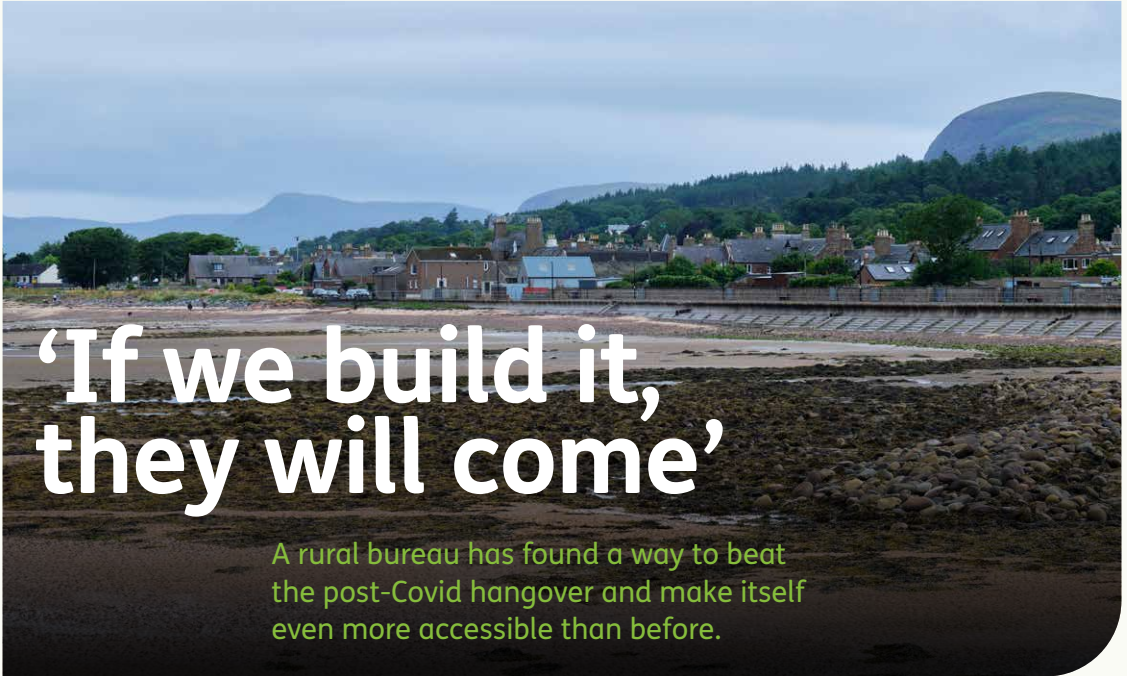
"We do hope we're inclusive already – it's part of our principles. But this is about taking the next step."

Attitudinal change

What has not happened is Drumchapel's investment in high-tech communication aids. Janet herself cautioned against this: "From my professional career, I was aware that almost as soon as you've managed to find the funds to buy a piece of kit, it's out of date," she says.

"A lot of the people I worked with had their own communication aids. They're not generally looking for services to provide those.

"It's more about an attitudinal change. I think it means we as a team are better equipped to provide a good service, regardless of people's communication needs."



‘If we build it, they will come’

A rural bureau has found a way to beat the post-Covid hangover and make itself even more accessible than before.

In the village of Bonar Bridge, all eyes are on the local football team’s recent revival in fortunes. In nearby Dornoch there are high hopes for a business improvement district to lift the local economy. Meanwhile, Rogart residents are launching a bid to save their historic church.

In a quieter way, the network has been making news in these communities too.

The three villages are among six which now benefit from weekly visits by advisers from the Golspie-based East and Central Sutherland bureau.

The bureau carried out regular outreach sessions before the pandemic called a halt. But the new arrangements cover a wider area than before.

Left out

Bureau manager Phil Carr saw the move as essential to offer a proper service to rural citizens. Bonar Bridge residents, for example, face a 40-mile round trip to visit the bureau, in an area poorly served by public transport.

“There are several big villages with populations of around 1,200, and some of them felt really left out,” Phil explains.

“People didn’t feel they could engage. They were ringing us and being told it could be four or five weeks before they saw anyone, so they weren’t bothering. We needed to do this.

“We spoke to the local MP and MSP, and word started to get out that we were looking to do this. Then other people started saying, ‘can you come and do our village too?’”



Phil Carr

Open door

The relaunch of outreach was part of a wider “open door” policy introduced earlier this year.

In the hangover from Covid, the bureau had been operating on an appointments-only basis

most days. Now it offers drop-in every day. In addition, it opens from 8am until 7pm on a Wednesday, and for two hours on a Saturday morning.

Phil arrived in post earlier this year after 10 years as a welfare rights adviser at Inverness, Badenoch and Strathspey CAB. He was met with instant enthusiasm when he proposed the service changes to the bureau team.

“Far from any opposition, the staff were very eager,” he says. “When I first arrived, we were dealing with about 95% of enquiries via email and phone. That’s now down to 70% and falling.”

New staff

The changes have been delivered by a very small team. Like other bureaux, East and Central Sutherland has had a “massive problem” finding volunteers since the pandemic.

However, Phil credits a “particularly proactive” board, and accepts that his bureau was financially better equipped than many to support extended working.

“It’s quite expensive – the outreach alone costs us £6,000 a year – but we do get part funded for it,” he says. “We were in a position where we had scope to employ a couple more staff.”

Those new arrivals, Frieda Scholz and Kerry Hawthorne, now lead the outreach sessions on a job share basis. Other team members juggle shifts to ensure there are always two staff covering the extended bureau hours.

“We took a decision to do this and it’s worked for our client base, so we’re sticking to it, but we’ll reassess things in December,” Phil says.

Mobile service

He’s already thinking ahead, however. Following discussions with his chair, Ruwan Uduwage-Perera, the bureau is now in discussion to acquire a van, of the type used by banks to provide mobile rural services. “Taking room hire and mileage into account, we figure it would be cheaper in the long run,” Phil says.

When proposing the changes, Phil found himself repeatedly using the Biblical quote that was later used in the movie *Field of Dreams*: “If we build it, they will come.”

His confidence has been justified by clients’ reaction. And there’s been a further, unexpected bonus: the bureau’s higher profile has already attracted some much-needed new volunteer recruits. ➤

Advice on the menu

Three days a week, Kerry Hawthorne runs Ardgay’s community tearoom, a haven for locals in the village and neighbouring Bonar Bridge.

For the rest of the week, Kerry dispenses advice rather than home baking. She’s one of the local bureau’s new outreach advisers serving the villages around Golspie.

With limited commerce in the area, the tearoom is popular. The new advice sessions are proving a big draw too: “People really appreciate it. We get busier by the week,” says Kerry.

She may be a newcomer to Citizens Advice, but Kerry is steeped in the local community: currently she’s preparing to support community lunches for Remembrance Day and Christmas.

Approaching an adviser in such a close-knit locality is not an issue, she believes. “People aren’t fazed: they know and trust Citizens Advice, and they know that if they come to us, that’s completely confidential.”

In fact, it’s Kerry’s job-share colleague, Frieda Scholz, who covers the Bonar Bridge session. “I’ve invited Frieda to the tearoom for lunch after her shift,” says Kerry.



View from the team

> “There’s little or no public transport here. We pay some of the highest petrol costs in the UK. If you’re on a limited budget, it’s a big ask to expect someone to make that journey from a local village to the bureau.”



Peter Wardhaugh

“People here pay higher food costs too, and we have the UK’s highest energy tariffs. The economy is very seasonal, so salaries tend not to be high.”

“The needs differ even between communities. In winter, the weather might be fine in Golspie but if you go up the glen to Lairg, it’s a 6 to 7 degree difference and there’s snow on the ground. Again, that adds to the cost of living.”

“With a colleague, I covered all the village sessions until our new outreach advisers arrived. In some of the communities we’ve seen a gradual uptick in enquiries, and in others a more significant rise – sometimes with a big increase on pre-Covid levels. Communities have been really grateful we are offering local clinics.”

Peter Wardhaugh, money adviser

“I’ve been getting the outreach clinics set up. In Brora we’re in the library, in Bonar they have a big hub, and we’re just about to start in the village hall in Rogart. There’s beginning to be a bit of a buzz around the neighbourhoods.”



Nichola Knight

“Within the bureau, having the door open has been wonderful. We’ve started to see a lot more clients, which has been lovely. One older lady said to me, ‘it’s so nice to be able to come in and see someone face to face.’”

Nichola Knight, administrator



Double honour for Coatbridge

The efforts of two stalwarts of Coatbridge CAB were recognised when North Lanarkshire’s Provost presented his annual awards to recognise outstanding contributions to the community.

Jim Melvin received the Excellence Award, acknowledging the positive results achieved for locals through his advice and support in more than 20 years with the bureau. Nan Fotheringham, a volunteer since 2002, was presented with the Special Achievement Award: the Provost, Kevin Duffy, said her work “typifies the spirit of the CAB”.

Nan (centre) and Jim (far right) are pictured with the Provost, accompanied by Jim’s North Lanarkshire Housing team colleague, Elspeth Campbell (far left), and Coatbridge CAB manager, Marian Tobin.

There were over 150 nominations for the awards, which recognise the contributions of ‘unsung heroes’.



At the client coalface

Gatekeeper: Triage worker Jill Taylor welcomes a client at Aberdeen CAB

It's an important role – and arguably the toughest in the bureau. Is triage part of the solution to the network's capacity issue?

As client demand soars, the role of triage has become ever more central to many bureaux as they strive to keep the lid on waiting times.

By welcoming clients, resolving simpler queries, recording data and funnelling enquiries to the right specialist, triage staff can take some of the heat off hard-pressed bureaux.

But the role hasn't always had support to match its potential importance. It's also deployed differently across Scotland. Various, admin staff, volunteers, generalist advisers and even session supervisors are charged with triage.

Now some bureaux are taking a closer look at the potential of a task that has sometimes been undersold.

Gateway adviser

Aberdeen CAB introduced what it then called a gateway adviser role in 2019. The idea came from staff at a team building event, as manager Kristi Kelly told this autumn's network conference.

"Waiting times were a growing problem. The choice was either moving away from drop-in to more appointments, or introducing triage," says Kristi.

A dedicated waiting-room was set aside. Triage was initially taken on by volunteers, though it proved hard to find people to take on these shifts: "Some loved it, but others preferred to stay with advising."

The pandemic called a halt to the exercise. On reopening, Aberdeen decided to switch triage to a paid role.

The role of recording

A year on, the bureau is still striving to perfect triage and maximise its effect on the service. So far, the numbers have shown no sign of budging. "I'm convinced it is having an impact, but the client waiting period hasn't yet changed," Kristi says.

She believes more thorough reporting via CASTLE might hold the key to demonstrating the value of triage. As she points out, while the network has seen a 6 to 7% rise in clients recently, the number of advice codes logged has not risen to match.

Discussion in the COCABS group, COCABS [▶](#)

▶ group, which is made up of CAB Chief Officers, involving other bureaux wrestling with the issue, suggests variations in recording practice. “It’s understandable that you might decide not to record data for someone who, for example, just wanted to return a faulty kettle – but it’s essential, not least for funding purposes,” Kristi points out.

Properly equipped

The training offered to triage staff and volunteers can vary, depending on the depth of the service they’re expected to provide. But Citizens Advice Edinburgh has recently strengthened its triage training, acknowledging the demands of the job.

“It was probably our hardest role,” says Benjamin Napier, CEO. “You’re right at the frontline, dealing with clients at their most stressed – and you might not be able to provide them with help immediately.”

Edinburgh now equips all triage operators by putting them through the first half of the Adviser Training Programme, covering all the diagnostics and information-gathering modules.

The work goes on, but defining and equipping this frontline role could ultimately hold the key to a more resilient network in challenging times.

Reimagining our service

Triage is only one element of a complex service that needs to reshape itself to handle the rising number of enquiries.

The network is now teaming up with academics to come up with fresh ideas. It has established a two-year Knowledge Transfer Partnership with service design experts at the University of Edinburgh.

“The aim is to solve problems and develop new ways of working – turning academic research into practical settings,” explains Jane Adams, CEO at Perth CAB. “Any bureaux can take part to work through any service design issue they may have.”

Viva volu

The challenge is on to rebuild, strengthen and

It’s the first principle that underpins every bureau: we’re a volunteer-led service.

Yet recently, that lifeforce has shrunk to an alarming degree.

In the network, many volunteers took the pandemic as a cue to sign off, a trend repeated across the third sector. Since then, the cost of living crisis has forced others to move to paid work, or to spend more time helping family with childcare.

Recent network data show 40% of new network volunteers have left within six months of taking up their role, and 26% within two years.

Even bureaux investing in training programmes struggle to replace volunteers fast enough – compromising their ability to meet rising client demand.

To counter this trend, the network is building a volunteering strategy, announced at the autumn conference.

Volunteers are being invited to contribute ideas through their bureaux. Key elements so far include:

- **Recruitment**
A new recruitment strategy and resources will aim to attract a wider range of volunteers.
- **Retention**
Extra support and recognition to ensure a wellbeing and a rewarding experience for all volunteers.
- **Equality and diversity**
Active attempts to attract volunteers from diverse backgrounds, and to tailor volunteer roles to meet the needs of marginalised people.

unteers

and celebrate the network's volunteer force.

- **Skills and opportunities**

The network is committed to gaining SCQF (Scottish Credit and Qualifications Framework) accreditation for its Adviser Training Programme, alongside other changes to enhance volunteers' employment prospects.

- **Volunteer voice**

A volunteer survey will be run shortly – the first since 2015 – and there will be regular events to recognise volunteers' contributions and achievements.

To develop and steer the new strategy, Allana Mullen has just joined CAS from Volunteer Scotland in the new role of volunteer support manager. She said: "Working collaboratively in a collective system, I believe we can make a real difference to volunteering, volunteers, the bureaux and our communities.

"The new volunteer strategy sets out key areas for me to focus on. I look forward to discussing these with everyone, and hearing about experiences across the network to inform



Allana Mullen

our approach to achieve a successful and impactful volunteer strategy."

"The time, effort and dedication of volunteers provide bureaux with their most valuable resource," added Laura Plumb, network services manager.

"Our ambition is to create a rewarding experience for all volunteers. We will also lobby for resources that recognise the invaluable contribution that volunteers play in the CAB network and, in turn, in our societies."

Ideas from the conference

"Besides volunteers from law courses, I think we should look at recruiting social work students. Social work involves dealing with people and social issues, and students are likely to have a social conscience and a desire to help people."

Ryan Kay, cost of living support worker, Stirling CAB



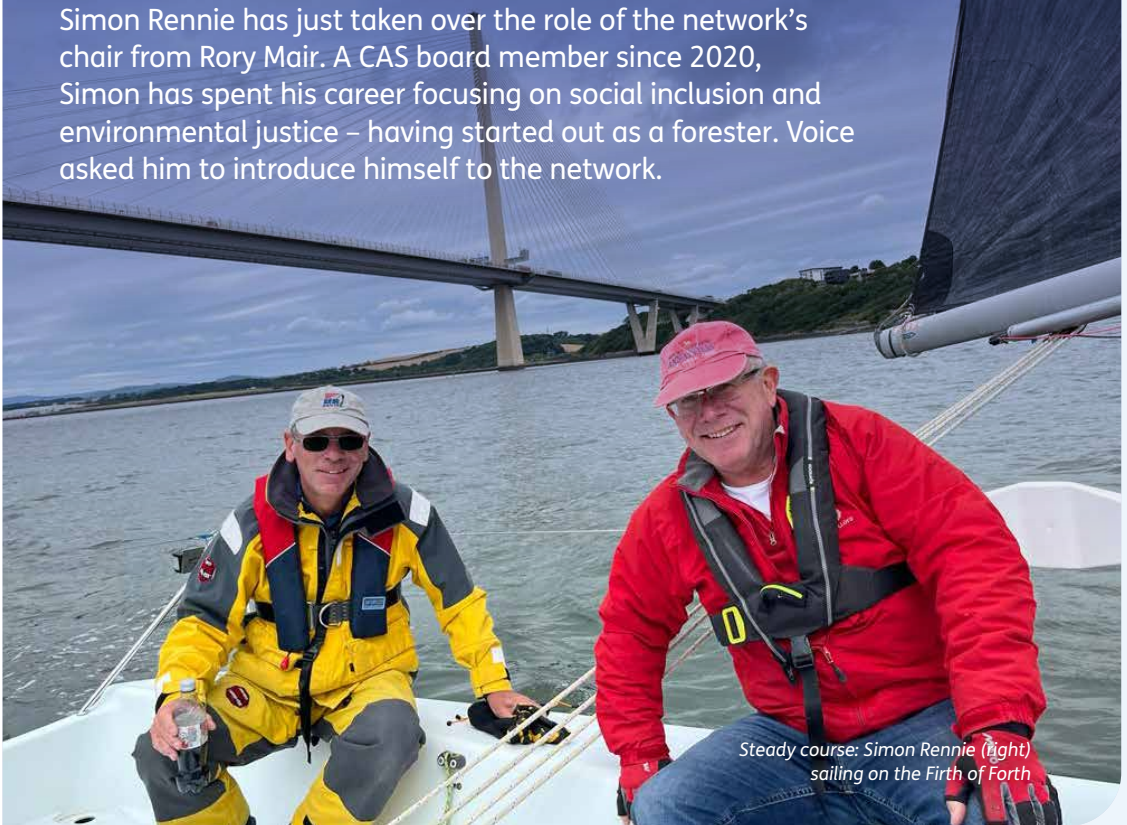
Ryan Kay

"Where we have been able to make progress recently is in diversity. Around 40% of our client base are from ethnic minorities, but our volunteer base is largely white. Working with local groups, we've done some targeted recruitment and a large proportion of our latest volunteer intake identify as minority ethnic. It's a small step forward, but it's a start."

Frank Mosson, manager, Glasgow – Bridgeton CAB

New captain at the helm

Simon Rennie has just taken over the role of the network's chair from Rory Mair. A CAS board member since 2020, Simon has spent his career focusing on social inclusion and environmental justice – having started out as a forester. Voice asked him to introduce himself to the network.



Steady course: Simon Rennie (right) sailing on the Firth of Forth

How did your career evolve?

On leaving school in Edinburgh I went to work as a forestry labourer in Aberdeenshire and Dumfries. I then studied forestry at Aberdeen University. After three years they told me they wouldn't offer me an Honours place because I had no academic interest. I was devastated –

because I'd wanted to turn them down. They were absolutely right about the lack of academic interest: I wanted to get on and 'do stuff'.

I saw a job advertised in the tropics. I was initially sent to Nigeria, then to the Solomon Islands and latterly worked in Malaysia, all in forestry.

It was a fantastic education in the private sector, for example getting to manage 400 staff as a 27-year-old. But then I entered into a relationship – my wife is Malaysian-Chinese – and I realised this was no life for a married man. I returned to Scotland with my wife-to-be Helen and my two step-daughters; I went abroad with a suitcase and returned with a family.

What led you into the third sector?

After coming back from the tropics I gained an MBA, and applied for a job in recycling with the Wise Group, the Glasgow social enterprise. Rather than focus on recycling, they asked me to set up an urban forestry company. The trees were really a means to impart soft skills; the real output was to get people into jobs from long-term unemployment.

From there I went to the Central Scotland Forest Trust – later expanded to cover a much wider area and remit. Again, it was all about environmental improvements, but with the aim of improving people's lives.

I was chief executive there until retiring in 2019, on my 60th birthday; I spent 30 very happy years working in the most interesting, and fulfilling, of the 'three sectors'.

How did you get involved with CAS?

Having retired from full time employment, I was looking for opportunities to volunteer in a charity with a people focus; someone suggested I look at CAS. Of course I'd known about the network's advice service, if not its advocacy role.

I joined the CAS board just as Covid was kicking off. I was visiting the Far East at the time and was interviewed for the trustee role on an early version of Zoom.

What are your priorities as chair?

I have volunteered for different organisations for a long time, and I'm very keen to see the

network's volunteering plan reinforced. For reasons that are nobody's fault, we currently have a demand for our services that massively exceeds supply.

I also want to tackle the fragmentation of funding. It's an issue across the sector. When I joined Wise we had four funders; by the time I left there were 100. There's a craziness to that, particularly when you think about the holistic nature of the service we're trying to provide at Citizens Advice. I want to work to match the shape and scale of funding to the shape of need.

In terms of CAS itself, I see my tenure as being one of 'business as normal'. By that I mean we have mature governance systems in place that can be trusted; we need to use them to focus on securing the network's future.

What are your interests outside the network?

I'm emotionally and practically committed to CAS for what I've told my wife will be two days a week. I've sat on, I think, 15 charitable boards, but the only other role I've retained is with a Midlothian charity called RUTS, which helps young people who've fallen out of the system to gain confidence and skills.

My wife is a dressmaker, and I'll be continuing to support her with the business behind the scenes.

I hope I'll still have time for sailing, which for me is a great escape. I have a wee boat moored at South Queensferry, which I used to race with four other people, but now sail alone. It's called Soon Fung, which in Chinese means 'fair wind' or 'bon voyage'.

I see my life in batches of three decades: the first 30 years were young and daft, and the middle three were middle-aged and responsible. I'm aiming to spend the next three decades being older while reverting to some daftness in due course!

Mutual benefits

Advice is on tap alongside deposits and withdrawals in some of Scotland's high street financial institutions.

Jess McGinlay's Tuesday routine is just a bit different from the rest of the week. Rather than arriving as usual at Clackmannanshire CAB, the adviser heads for the Yorkshire Building Society (YBS) branch, just a few minutes' walk away on Alloa High Street.



Sophie Wylie

Working from a private office at YBS, Jess is able to support clients as she would at the bureau. The appointments are arranged by YBS staff, which publicises the service.

It's the latest result of a long-running partnership between the building society and Citizens Advice. Launched in 2021 in six branches in the Yorkshire area, the pairing has gradually spread through England, and reached Scotland this summer.

Besides Clackmannanshire, advisers from bureaux at Dundee, East Ayrshire, East Renfrewshire and Glasgow North West are also being funded by YBS to spend one day a week working from their local branches, initially for a year.

"YBS will arrange three appointments per day, or if they can't the bureaux themselves will backfill," says Sophie Wylie, who is coordinating the Scottish partnership for CAS.

"It widens the potential pool of clients. YBS may have existing customers who need a bit more holistic advice than the building society

can provide, for example. But anyone can use the service – they don't have to be a YBS client."

That is certainly Jess's experience to date. She's responded to "a huge mix" of enquiry types in her YBS stints. "For clients, being able to make an appointment is a welcome addition to the drop-in system we have at the bureau," she says.

"Since the YBS team only take a name and contact number when making an appointment, it's entirely confidential, just as it would be in the CAB. I've been able to build a really good relationship with the team, and they're great at promoting the service."



Banking on new clients: Jess McGinlay at the Alloa YBS branch