

# Scottish Association of Citizens Advice Bureaux Membership Scheme Annual Report 2007

The Membership Scheme has proved a landmark in the development of Scotland's CAB service and a step-change in our commitment to quality.

## Background

Our current Membership Scheme was introduced in April 2002 following unanimous agreement from the members at the 2001 AGM. It has proved a landmark in the ongoing development of Scotland's CAB service and a step-change in our commitment to quality.

The revised scheme has developed a more robust and stringent audit process to examine operational and procedural standards every three years - but it has also seen the introduction of a new methodology to assess the quality of advice delivered by member bureaux.

This process for assessing the quality of advice examines a selection of client record sheets for compliance against a set of criteria to ensure that bureaux are not only adopting a quality approach to the management and operation of their services, but that they also deliver quality advice, casework and representation to clients.

## Has the New Scheme Made a Difference?

The results gathered over the last five years would suggest that quality standards have improved significantly, both in terms of organisational elements and quality of advice and case recording.

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We are now nearing completion of the second round of audits and all bureaux have now successfully complied with their first round audit. Of the 51 bureaux that have undergone their round 2 audits to date:

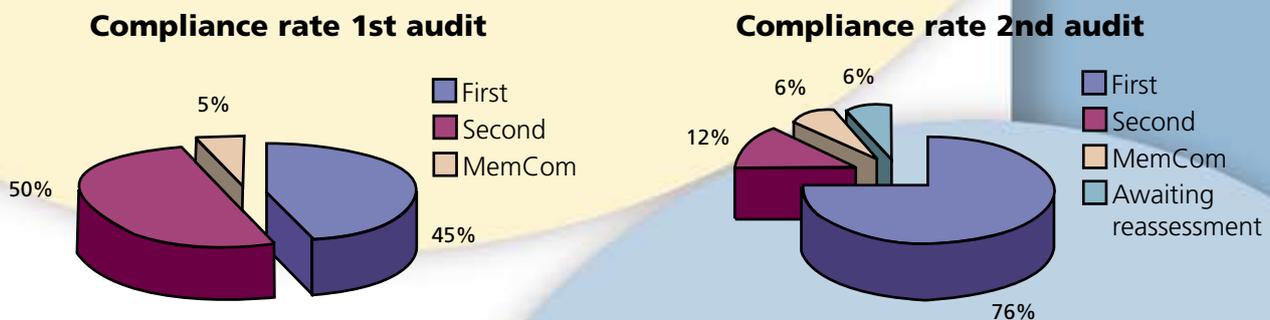
- 39 (76.5%) of them have achieved compliance without any corrective actions being required for both in the Quality of Advice and Organisational Audits,
- Of the remaining 12, six achieved compliance after completion of a corrective action plan,
- three complied after completion of a second corrective action plan imposed by Membership Committee,
- the remaining three are in the process of completing their corrective actions.

This is a significant improvement on the results for the first round of audits as only 27 of the 60 bureaux audited (45%) complied with the audit at the first attempt, while 3 (5%) were given an imposed corrective action by Membership Committee as they failed to comply when reassessed following implementation of their own corrective action plans.

This improvement is even more impressive given that the minimum compliance requirement for the Quality of Advice assessment was increased for round 2. In round 1, a bureau needed to achieve 50% compliance for each quality criterion with an overall average of 70%. In order to encourage continuous improvement, this was increased to 55% and 75% respectively in round 2.

The scheme always intended to provide not only a robust and accurate quality assurance measure of standards in Scottish bureaux, but also a means of encouraging and measuring continuous improvement. With this in mind, Membership Committee has proposed that SACAB increase the compliance requirements by a further 5% for the third round of audits, meaning that all Scottish Bureaux will have to achieve an overall average compliance score of 80% to achieve compliance with the Membership Scheme. This proposal will need to be ratified by the members at the 2007 AGM before it can come into effect in April 2008.

The pie charts below compare compliance rates between the 1st and 2nd round of audits. There has been a significant improvement with the percentage of bureaux complying 1st time increasing from 45% to 76%



### Where Do We Go From Here?

As previously mentioned, in an effort to encourage continuous improvement the Membership Committee have proposed that the Quality of Advice compliance requirements should again be raised for round 3, which is due to start in April 2008. This may seem like an unattainable level of compliance - but analysis of the round two results shows this change reflects the level that most bureaux already work to. Almost 90% of bureaux achieved the proposed round 3 compliance requirements in their round 2 assessment. In the spirit of encouraging continuous improvement, CAS has already put in place systems to support development towards compliance.

The other major development approved by Membership Committee this year was a project to devise a process to assess specialist level casework. The current Quality of Advice Assessment process, whilst a robust and stringent method of assessing generalist level advice delivery, is not ideally suited to assessing the work of advisers who are working beyond generalist level and the scope of Advisernet. This - together with the introduction of the Scottish National Standards for Information and Advice Providers - has made it essential that we develop this additional process to ensure that the SACAB scheme remains accepted as equivalent to all other quality standards applicable to the advice sector. It is hoped that a proposed process will be developed in time to present to Members at the 2007 AGM to allow it to be piloted alongside the round 3 audits.