



Annual Report 2017-18

February 2019



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Introduction

In this annual report we set out how Citizens Advice Scotland supported the Citizens Advice network in Scotland and furthered our aims across 2017-18. We have written it to accompany our 2017-18 accounts, which provide full financial information for the year.

Our role within the Citizens Advice network in Scotland:

The Citizens Advice network in Scotland is the largest independent advice service in the country. Citizens Advice Scotland is a charity within this network – we act in the interests of citizens, as a national organisation supporting and representing the service as a whole. At the heart of the network there are 60 individual citizens advice bureau organisations across Scotland, all operating as independent charities in their own right, and generally focusing on providing support directly to clients. Each of these organisations is a member of Citizens Advice Scotland. Also providing significant added value are national services run by Citizens Advice Scotland, such as the Extra Help Unit.

As a national component of the network, Citizens Advice Scotland provides training and information

to bureau teams, as well as a rigorous quality assurance and monitoring programme, ensuring that the same high quality of advice is available across Scotland. We work to secure national programmes and projects that provide support to individuals on specific issues (in Scotland and across Great Britain), delivered through bureaux wherever possible and directly where that is most appropriate. We also carry out research, policy work and campaigning on important issues that we see arising via the advice sought by clients from across the network.



Our vision and strategy

Scotland's citizens continue to face challenging circumstances: strains on employment, finances and the everyday cost of living are bringing people to the network with an increasing number of complex and inter-related issues.

We believe that every citizen should have access to free, impartial and confidential advice that helps them make informed decisions, whenever they need it and however they choose to access it. Whether that's face-to-face, over the phone or online, people know that wherever they see the familiar blue and yellow of our brand, they are guaranteed the same high quality of free, impartial and confidential advice.

Building our strategic framework

Across this financial year we focused on the development of a new strategic framework for the organisation. Our aim was to develop a focus for Citizens Advice Scotland that enabled us to support citizens and our members in the most effective way possible.

To this end we conducted an extensive programme of consultation and discussion, leading to the development of our strategic framework for 2018 – 2023. The finished framework was presented to our members in November 2017, and we have spent the months since developing plans to roll out the plan effectively across all our areas of work.

The framework sets out the following vision, purpose and focus areas.

Our vision and purpose

Citizens Advice Scotland will help build a fairer society by:

- > enhancing and adding value for the Citizens Advice network (which provides free access to quality information and advice for all)
- > influencing for positive change

Across 2018 – 2023 we will focus on four strategic focus areas:

- > **Funding and income:** We recognise that appropriate funding and income is critical to the success and impact of the whole Citizens Advice network in Scotland, and that we have a key role to play in securing it.
- > **Enabling service delivery:** High quality advice and information should be available for all who need it – and to make that a reality we must work together effectively across the network.
- > **Building brand:** The brand of the Citizens Advice network in Scotland is a valuable asset. We believe it should be protected and that by building it we can provide greater support to the network and to citizens.
- > **Advocacy and influence:** Citizens Advice Scotland acts as a voice for the network in Scotland, influencing decision makers in the interests of the network as a whole and of citizens.

The year in numbers

We supported our membership of **60** citizens advice bureaux. We supported them as they worked with **261,900** clients on over **765,000** issues, helped clients access more than **£138 million** in gains (including compensation, money due, and in-kind support), and complete over **44,000** official forms.

The citizens advice network in Scotland:

- > **60 citizens advice bureaux:** delivering advice across more than 260 locations
- > **Citizens Advice Scotland:** national membership organisation

What we do, together:

- > **Deliver advice when it's needed most** – face to face, by phone and online
- > Work to bring about positive change through **research, policies and campaigns**
- > Work to make **society fairer** and ensure people's **rights are respected**





£5.8million

in funding secured and passed directly to network members



3,014

queries from network members were responded to by our development team with tailored support and information



96,337

enquiries answered via our Consumer Service helpline team in Scotland



11,925

people given support with their energy and postal complaints via our Extra Help Unit, securing £236,597 in financial redress for them



21,243

training and learning opportunities provided to network team members, online and in person



18

full and in-depth quality audit report checks, demonstrating quality compliance at just short of 90% across the network.



43

members participated in the pilot and initial implementation of a new quarterly quality of advice monitoring process.



74

sites across the network supported to use shared IT services



862

advice webpages updated with vital information for advisers and citizens – AdviserNet pages were viewed 3,256,149 times by team members from across the network.

Funding and income

We recognise that appropriate funding and income is critical to the success and impact of the whole Citizens Advice network in Scotland, and that we have a key role to play in securing it.

Activity and impact across 2017-18:

Across the year we **distributed £5.8m to our citizens advice bureau members**, supporting them in their work with clients across the country. We successfully retained **all existing national contracts** for specialist advice.

We increased the funding distributed for **energy advice**, funded by both SSE and EDF under the Energy Best Deal from £162,000 to £367,000 and widened coverage in Scotland for clients in fuel debt. In partnership with Mentor UK, we won the tender for and launched **Scotland's National Kinship Care Advice Service**, more than doubling the funding for kinship care advice delivered by Scotland's CAB to £250,000 per annum. We launched an improved

service for veterans delivering in new areas such as Ayrshire and providing additional support for older veterans as part of the Unforgotten Forces consortium.

We also provided **£1.4 million in funding for more than 400 local CAB** partnerships delivering advice to 30,000 vulnerable people, and made 13 awards to bureaux throughout Scotland totalling **more than £400,000**. These awards focused on development of services, including several innovative pilots – for example developing new volunteering opportunities to support ESA claimants, and working with employers to prevent poor employment practice before disputes arise.

Looking ahead:

- > We will continue to work to secure funds, partnerships and projects that support member bureaux at a national level, and to provide tailored support to enhance the financial stability of our members at a local level wherever possible. As part of this work, we will focus on developing ways to support members to demonstrate positive outcomes and value for money through the interpretation of their statistics and data.
- > We will continue to explore opportunities for the network to support activity around access to information about relevant benefits, in partnership with the Scottish Government.
- > We will run training and learning sessions for members on fundraising and income generation, to support them to develop and build on the relevant skills and experience needed to secure income.



Enabling service delivery

High quality advice and information should be available for all who need it – and to make that a reality we must work together effectively across the network.

Activity and impact across 2017-18:

This year saw CAS undertake a project to **map client journeys through the Citizens Advice network in Scotland**. This twelve week in-depth research programme looked at all service points and channels to understand points of friction and areas for improvement. The findings of this research have been shared with members and a network-wide digital roadmap developed. This informed the enabling service delivery section of the strategic framework.

Regarding specific services, we expanded advice for people approaching retirement through the PensionWise service, which now offers **online booking for appointments** in CAB throughout Scotland; and launched the new Patient Advice Service, incorporating a **new national distributed multichannel approach**, staffed by local CAB which has dealt with nearly 2,000 calls, emails and webchats in its first year.

We also launched a new version of the **CASTLE case recording system**, used by most bureaux, in October 2017. The new system was a major investment and provided significant improvements in user friendliness of the case recording functionality for bureau advisers, and also incorporated a new debt advice module.

Our **training** team delivered 21,243 online and face to face training programmes to staff and volunteers across bureaux, as well as developing 10 new sets of training materials and updating 72 sets dealing with new topics of advice.

Lastly, the Citizens Advice Scotland **Extra Help Unit** continued to support vulnerable consumers throughout Great Britain. The financial redress achieved for these consumers grew from £1,978,063 last year to £2,377,365 during 2017-18. Our funding for 18-19 has now been increased to reflect this increase in calls, as well as the extra complexity in the market due to the higher number of new suppliers.

Looking ahead:

- > As part of a significant investment to increase online capability and digital infrastructure for the network, we will work with BT to improve broadband infrastructure to 53 network locations.
- > We will continue to work to provide members with the highest quality tools and services. Across the coming year we will commit further funds to the ongoing development and maintenance of CASTLE, and will continue to focus on improvements to AdviserNet content and usability.



Building Brand

The brand of the Citizens Advice network in Scotland is a valuable asset. We believe it should be protected and that by building it we can provide greater support to the network and to citizens.

Activity and impact across 2017-18:

For the first time the Citizens Advice network in Scotland featured in a **national TV advertising** campaign for a financial health check for older people throughout Scotland.

In addition a refresh of the Citizens Advice Scotland brand was undertaken, with a view to developing a more contemporary set of **brand guidelines** for both CAS and our members. These have been implemented for CAS publications and materials and will be rolled out to the wider network in 2018-19. Digital brand guidelines have been developed for the first time, for use in website development in the coming year.

Ensuring the network as a whole delivers consistent, quality advice is key to building our brand. To this end across the year we piloted a new membership scheme **audit model** which was unanimously adopted by members at the annual general meeting in December 2017. The model introduced a more rigorous and robust quarterly quality of advice assessment process and an annual organisational self-assessment. We also facilitated 12 Quality of Advice Checkers Forum meetings which were attended by representatives from 52 member bureaux. The forum meetings support bureaux quality of advice checkers to achieve consistency in quality checking and promote the sharing of good practice.

Looking ahead:

- > We will launch revised brand guidance and a new 'BrandBase' service for CAB, which will allow them to create professional publicity materials, leaflets, posters and more, tailored with their own CAB name and details. The aim is to support a high-quality representation of the brand while tailoring for local needs and in a cost-effective way.
- > We will develop, test and rollout a template website which can be used and adapted by all members in Scotland who wish to use a version of it. The template will focus on providing citizens with the advice they need, and highlighting all the advice channels available to them in their area. It will provide a modern, easy-to-use and professional experience for users, and will be provided to members free of charge.
- > The full new audit process for members will be fully live from April 2018, encouraging continuous self-assessment and improvement across the network.



Advocacy and influence

Citizens Advice Scotland acts as a voice for the network in Scotland, influencing decision makers in the interests of the network as a whole and of citizens.

Activity and impact across 2017-18:

Our work to shape the **Social Security Bill** at the Scottish Parliament resulted in a formal recognition of the role of independent advice, a restriction on face-to-face assessments for benefits, a duty to make all information and communications inclusive and accessible, an improved reconsideration and appeals system, and assurance that benefits will be updated in line with inflation. On **Universal Credit** at a UK-level, we joined the call for a pause in the roll out of Universal Credit until significant changes were made. This call led to the UK Government making a number of important changes, including slowing the roll out, reducing the waiting time for payments, and making hardship payments more accessible.

We ran a series of **campaigns** across the year. As part of our campaign for members on **local bus services**, more than 4,600 members of the public were surveyed about their experiences of local bus services. Our report on the issue has been influential in the development of the updated National Transport Strategy Review and

the upcoming Transport Bill. Also this year we worked in partnership with Which? to run a consumer education **campaign on nuisance calls**, resulting in a 7000% increase in visits to our online advice page.

We also had a range of policy successes in our work on **energy, post and water services**: our recommendations on household energy efficiency strongly influenced the the Scottish Government's new long-term programme on the topic; following our work on fuel poverty, the Scottish Government announced they will fund a pilot to deliver energy advice, directly in line with our proposals; after we conducted a range of activity highlighting surcharges being applied for parcel deliveries to some parts of Scotland, the Committee for Advertising Practice introduced enforcement action against companies with misleading online delivery claims; and we jointly established the Customer Forum, which will directly represent the interests of consumers in the development of Scottish Water's business plan for 2021-2027.

Looking ahead:

- > Across the coming year we will develop a national web-based data hub, pulling together the powerful evidence base the whole network has to highlight the need for change on key issues, in an anonymised format that is easy for members and stakeholders to use.
- > We will continue our programme to enhance and bolster relationships with key stakeholders at a national level – particularly in government, civil service, and with key funders. This will be an ongoing process, and work on all the framework strands will strengthen and feed into these efforts.
- > We will conduct high-impact work on key policy and campaign areas – influencing for change on topics ranging from the cost of food to consumer scams, and from debt to energy issues.



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