

Review of the Citizens Advice equality scheme

2005 - 2008

Fair Accessible Inclusive Relevant



Foreword

Citizens Advice supports, represents and leads Citizens Advice bureaux. Together, bureaux and Citizens Advice form the Citizens Advice service. The service is a national provider of advice services through our extensive local network of bureaux, with a large number of paid staff and volunteers. We are an influential player in national public policy debates on behalf of our clients. This enables the service to have a significant impact on promoting equality and diversity throughout the wider community. Our potential to assist with creating a more inclusive society is substantial.

That is why our service-wide equality and diversity strategy, FAIR (Fair Accessible, Inclusive, Relevant) adopted in 2004, is ambitious. FAIR committed Citizens Advice (and bureaux) to:

- make equality and diversity part of all we do;
- to become a first point of contact for discrimination advice, in partnership with others.

In 2005, Citizens Advice published our first equality scheme. Its aim was to set out how Citizens Advice would implement FAIR. The activities we committed ourselves to covered all dimensions of equality, all aspects of Citizens Advice's work and aimed to support bureaux in their work to make the strategy a reality.

Now, in 2008, we are publishing our review of progress made under the equality scheme. We are not required by law to publish an equality scheme or its review. But we want the public, member bureaux, our partners and funders to know what we aimed to achieve and the extent of our progress. The findings from the review will inform the development of our next four year FAIR strategy, which will be an integral part of our new Corporate Strategic Plan 2008-2011.

We are pleased with the progress identified in the review but not satisfied with it. Funding cuts to Citizens Advice and bureaux over the past two years have hampered progress. But the review also indicates that Citizens Advice must show more leadership in certain areas and set higher standards for the service as a whole.

Where progress has been made, it is the enthusiasm, commitment and hard work of bureaux, staff volunteers and trustees, as well as of Citizens Advice employees which has paid off. We have built on our long tradition of delivering advice to those who need it, particularly the most marginalised in our society, and of influencing public policy nationally and locally. Much remains to be done and we plan to do it.

April 2008



David Harker, Chief Executive, Citizens Advice

Executive Summary

Overview

Much has been achieved under the plan, but not all the hoped-for progress has occurred. Financial constraints have been a significant impediment. The review has enabled us to identify our achievements and pinpoint where greater effort or resources need to be concentrated to fulfil key equality and diversity objectives.

Strategic Objectives 1 & 3: Meet the needs of as many people as possible and ensure we reach those in greatest need. Innovate and develop new services.

Progressing this aim, including work to become a first point of contact for discrimination advice, in partnership with others, has been underway since 2004. However few new targeted funds have been available. The past two years have also seen funding cuts to bureaux and Citizens Advice. Nevertheless, many bureaux have implemented major changes in ways of working and facilitated improved client access. Many too have expressed enthusiasm for engaging in more specialist discrimination work, beyond giving generalist advice.

More far-reaching change still is needed to ensure that those in greatest need receive the advice services they require.

Strategic Objective 2: Have a great influence on policy

Influencing public policy debates is a key strength of Citizens Advice. Championing the rights of marginalised groups is central to our work. Much has been done to raise discrimination issues with policymakers, particularly during 2007. However, the views of our external stakeholders indicate that more has to be done to convince them of the service's role in combating discrimination.

Strategic Objective 4: Improve funding

Equality and diversity fundraising has been very successful in the past two years, in terms of bids made and money raised. How effectively equality and diversity issues have been integrated across fundraising generally needs to be examined further. More work also needs to be done to support bureaux directly on equality and diversity fundraising and financial planning.

Strategic Objective 5: Develop all our people

Progress towards a more diverse senior management in Citizens Advice and bureaux has been very limited. Other data points to more encouraging developments: a growing number of young volunteers and volunteers from black and minority ethnic (BME) backgrounds, and Citizens Advice's progress as a top employer of lesbian, gay and bisexual people. These developments will assist with the process of change which we are actively pursuing.

Review of the Citizens Advice Equality Scheme: Main report

1. Introduction: the Citizens Advice service

- 1.1 The Citizens Advice service helps people resolve their money, legal and other problems by providing free advice and information and by influencing policymakers. The service comprises 433 Citizens Advice Bureaux and Citizens Advice, their membership organisation. In 2006/07, Citizens Advice bureaux delivered advice from nearly 3,300 locations in England and Wales. They dealt with 2 million clients and over 5.7 million new problems. Each bureau is a registered charity and a member of Citizens Advice.
- 1.2 Citizens Advice is also a charity. Its role is to develop, support, represent and lead the service; set, maintain, and monitor standards for the service; ensure that the voice of CAB clients and the service is heard; and provide quality services and products.

2. FAIR: the equality and diversity strategy of the Citizens Advice service

- 2.1 In 2004, the Citizens Advice trustees approved Fair, Accessible, Inclusive and Relevant (FAIR), the first equality and diversity strategy for the Citizens Advice service. Its development was based on extensive consultation with member bureaux and national partners.
- 2.2 FAIR was part of the 2004–2008 Citizens Advice service Corporate Strategic Plan, and included equality and diversity objectives for every aspect of the service's work. FAIR set two aims for bureaux and Citizens Advice:
- to make equality and diversity part of everything we do
 - to become a first point of contact for discrimination advice, in partnership with others.
- 2.3 An equality scheme set out how the national organisation, Citizens Advice, would implement FAIR¹. It covered all aspects of Citizens Advice's work and related to all the six equality areas (gender, race, disability, sexual orientation, religion and belief, and age). The scheme included an equality baseline outlining how Citizens Advice would measure its performance.
- 2.6 Citizens Advice reviewed progress under the scheme in 2007. The review is summarised here for members of the public, partner organisations and member bureaux. Drawing on the review findings, a new equality and diversity strategy will be published in 2008. It will sets out how we will deliver the equality and diversity objectives within the new CAB service Corporate Strategy for 2008 – 11, '*Whoever you are, Whatever the problem*'.

¹ The scheme can be downloaded from www.citizensadvice.org.uk (About us/Our approach to equality and diversity). The detailed activities are not repeated here.

3. The review of the equality scheme

Introduction

- 3.1 Much has been achieved under the plan, but not all the hoped-for progress has occurred. Financial constraints (see 3.3 below) have been a significant impediment. The review has enabled us to identify our achievements and where more effort and resources need to be concentrated to fulfil key equality and diversity objectives. These are reported below.
- 3.2 We are reviewing the measures against which to monitor improvement under the next FAIR strategy. A number of measures decided on four years ago required information which is not available or is too general to be meaningful. As a result, this review of the equality scheme includes additional data where relevant.

Highlights and areas for improvement

Strategic Objectives 1 & 3: Meet the needs of as many people as possible and ensure we reach those in greatest need. Innovate and develop new services.

The FAIR strategy committed the CAB service to providing inclusive, quality services, and achieving fairness/equality in:

- Access to advice and non-advice services
- Availability and targeting of services, including discrimination advice
- Service user satisfaction levels

In the development of new services, the FAIR strategy committed the CAB service to developing inclusive new services or developing existing services and achieving equality/fairness in:

- Use of new and developmental services
- Service user satisfaction levels

The Citizens Advice equality scheme included a wide range of activities designed to meet this objective through supporting bureaux in the delivery of discrimination advice, client diversity, information services, IT accessibility, and support for bureaux on equality and diversity work.

- 3.3 Progressing this aim has been underway since 2004 but with few new targeted funds and in the face of recent funding cuts to bureaux and Citizens Advice. Nevertheless, many bureaux have implemented major changes in ways of working and facilitated improved client access. More far reaching change still is needed to ensure that those in greatest need receive the advice services they require. Delivering a more diverse client profile and increased discrimination advice will, however, require further efforts by and increased funding for the service.

Becoming a first point of contact for discrimination advice in partnership with others

- Considerable progress has been made on becoming a first point of contact for discrimination advice in partnership with others. However, substantial new resources are required to achieve this aim service wide and to make provision of generalist and specialist discrimination advice and casework a reality. Work to identify funding is ongoing, following major successes in securing (in partnership with other advice sector agencies) Big Lottery Fund (BLF) and EU Progress funding to build discrimination advice capacity.
- The successful Majority Matters project (which received targeted government funds) on sexual orientation, religion and belief and age discrimination has contributed significantly to the service's ability to deliver discrimination advice. Its major achievements include:
 - 50 case workers and 163 advice session supervisors trained;
 - Models for provision of discrimination casework and community engagement piloted in seven bureaux;
 - development of a resource pack and online training resources;
 - evaluations published.
- The number of discrimination cases recorded by bureaux has dropped (see Appendix): our assessment is that this does not reflect a drop in actual cases, but is the result of changes to the way cases are coded and improvements in advisers' ability to identify discrimination accurately.
- Employment remains the most common subject on which discrimination advice is given and within this sex and disability the most common grounds, followed by race.
- The number of discrimination cases supported by the Specialist Support Unit (SSU) has increased by nearly 20% between 2005/06 and 2006/07 (from 505 to 598 cases).

Training

- Training services have completed essential changes which ensure that anyone new to the trainee adviser certification process has addressed discrimination issues. Considerable work has been undertaken integrating equality and diversity issues into training materials and courses.

Client diversity

- This has not changed significantly between 2004/05 and 2006/07. The statistics for 2006/07, however, are more accurate than those for the earlier years. For example, the proportion of clients recorded as disabled has increased, but this reflects improved record-keeping not an increase in numbers seen (see Appendix for ethnicity and disability statistics).

- Other data show that between 2004/05 and 2006/07:
 - 10% more bureaux used interpreters to translate enquiries or advice;
 - the number of bureaux providing public access to Adviceguide has nearly doubled to 86, as have the numbers providing access to those with mobility and sensory impairments;
 - 1590 services were promoted to 25 different communities, up from 1318;
 - the proportion of bureaux using Language Line increased from 18% in 2005/06 to 21%.
- It has not been possible to provide a breakdown of user profiles of Adviceguide (the online CAB service providing independent advice on individual's rights and responsibilities): work is underway to explore how to address this.

Information services

- Adviceguide is the Citizens Advice service web-based public information service: website accessibility has greatly improved and equality proofing of its contents is underway.
- Advisernet is the advice information intranet provided by Citizens Advice for bureau (and many other) advisers: significant changes have been made to reflect recent changes in equality law; equality proofing and updating in certain key areas (including an increased focus on human rights issues) of this essential tool for advisers needs to be progressed.

IT accessibility

- Citizens Advice corporate web sites have achieved a good level of accessibility assessed against the standards of W3C (World Wide Web Consortium) and as independently assessed by AbilityNet.
- Significant progress has been made in IT accessibility for disabled staff and volunteers. All electronic-learning modules are accessible.

Support to bureaux in implementing equality and diversity

- The number of bureaux reporting using FAIR increased from 30% in 2005/06 to around half in 2006/7. This is likely to be an underestimate: bureaux do not always regard equality and diversity work as being part of FAIR.
- Considerable support has been provided by the Citizens Advice Areas/Wales and the FAIR teams to bureaux in developing their FAIR strategy. Well over 80 per cent of bureaux say they are satisfied with this support.
- An equality and diversity specialist staff member within membership support services has been in post since early 2008 and represents significant additional support to bureaux. Work is underway to provide easy-to-use tools to support bureaux to incorporate equality and diversity objectives within their business plans.

Strategic Objective 2: Have a greater influence on policy

The FAIR strategy committed the CAB service to run effective, inclusive campaigns, and achieve equality/fairness in:

- Coverage of equality issues in national and local social policy work and campaigns in order to promote equality and tackle discrimination and disadvantage;
- Stakeholders', such as partners, policy makers, government and Local Authorities' satisfaction levels with our engagement with and influence on key equality issues.

The Citizens Advice equality scheme included different activities designed to increase the amount of evidence and press coverage with an equality/discrimination focus, and to influence government policy in key equality areas.

- 3.4 Influencing public policy debates is a key strength of Citizens Advice. Championing the rights of marginalised groups is central to our work. Much has been done to raise discrimination issues with policymakers, particularly during 2007. However, the views of our external stakeholders indicate that more has to be done to convince them of our effectiveness in this area.

Public policy

- The perception of the Citizens Advice service and our commitment to equality and diversity held by external stakeholders was steady between 2005 and 2007. However, further work needs to be done to convince them that we can achieve our aim of becoming the first point of contact for equality and human rights issues.
- The number of bureau evidence forms submitted electronically highlighting policy issues relating to discrimination accounted for 2.4% & 2.3% of the total submitted in 2005/06 and 2006/07 respectively. Since nearly twice as many forms were submitted electronically in the second year, this represents a significant increase in absolute terms. Work is underway to provide more guidance to bureaux in this area.
- Discrimination issues were raised with policymakers across several different policy areas and substantial pieces of work undertaken championing the rights of discriminated against and marginalised groups.
- During 2007, despite limited press office resources, 40 articles highlighting Citizens Advice policy or advice work on discrimination and equality issues appeared in the mainstream media. This was up from 34 in 2005

Strategic Objective 4: Improve funding

The FAIR strategy committed the CAB service to seeking and allocating resources equally and fairly in:

- providing advice and non-advice services
- conducting staff and volunteer development, project and social policy work.

The Citizens Advice equality scheme included a number of activities designed to increase fundraising activities for equality, and to monitor and account for the use of resources on equality and diversity-related work.

3.5 Equality and diversity fundraising has been very successful in the past two years, in terms of bids made and money raised. How effectively equality and diversity issues have been integrated across fundraising generally needs to be examined further. More work also needs to be done to support bureaux directly on equality and diversity fundraising and financial planning.

Fundraising

- 12 bids with a strong equality focus were made in 2006/2007 raising £2,759,000, reflecting the BLF and EU successes referred to above. This was an exceptional increase on 2005/06 (£440,000 raised). Halfway through 2007/08, £448,000 had been raised: substantially less than 2006/07 but on track to outstrip 2005/06.
- Substantial support has been provided to bureaux in relation to fundraising, but work needs to be done to evaluate the support provided on equality and diversity issues.
- Promoting budget practices which enable Citizens Advice and bureaux to plan for and record equality and diversity costs, has proved difficult. Recently, more detailed guidance has been given to bureaux, the success of which will be evaluated. Improvements in Citizens Advice internal budget recording practices in relation to equality and diversity costs will occur in 2008/09.

Strategic Objective 5: develop all our people

The FAIR strategy committed the CAB service to being an inclusive, best practice employer and achieving equality/fairness in:

- representation of people at all levels of the workforce and governance structures;
- treatment of employees/volunteers at every stage of their experience working/volunteering for the service
- employee/volunteer satisfaction.

The Citizens Advice equality scheme included a very wide range of activities relating both to Citizens Advice staff, and support for bureaux on recruiting and retaining a diverse group of staff, volunteers and trustees.

- 3.6 Progress towards a more diverse senior management in Citizens Advice and bureaux has been very limited. Other data points to more encouraging developments: a growing number of young volunteers and volunteers from black and minority ethnic (BME) backgrounds, and Citizens Advice's progress as a top employer of lesbian, gay and bisexual people. These developments will assist with the process of change which we are actively pursuing.

Diversity amongst Citizens Advice and bureau people

- This has not changed greatly (see Appendix, including some comparative figures for the UK population). BME and disabled people remain underrepresented at senior level in Citizens Advice and as bureau trustees and managers. Particularly disappointing is the decline in the proportion of BME managers appointed in 2006/07: 6% of existing managers were from BME groups, but of the 46 new managers recruited by bureaux, 4% were.
- Disabled people remain underrepresented at all levels within Citizens Advice and bureaux. Active steps are being taken to address these issues.
- Other data show positive change is occurring:
 - new volunteers were much younger than existing volunteers: 70% were under 55 compared with less than a third of existing volunteers;
 - more BME volunteers are being recruited: 20% of new volunteers are from BME groups, compared to 5% of existing volunteers;
 - fourteen percent of paid advisers are from BME groups;
 - Stonewall Workplace Equality Index 2008: Citizens Advice was 24th (up from 42nd in 2007) in the top 100 employers of gay people;
 - Sixty per cent of respondents in 2008's Citizens Advice staff survey believed that we demonstrated that we and equal opportunities employer, an increase from 47 per cent in 2005. .