

Citizens Advice Direct Annual Report 2007/2008

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Message from the Chief Executive



What a year it has been, for all of us.

It's been a great and challenging year for Citizens Advice Direct. It saw the introduction of the support advisors, who assist the volunteers to deliver the advice. This addition enabled the service to expand and increase the access to more clients. In the last year the volume of enquiries handled was over 26, 500, a 35% increase on the previous year and it is well on its way to achieving this years target of 40,000. The service is very proud to say that it has passed its quality of advice audit with Citizens Advice Scotland.

I'd like to say a huge thank you and my sincere appreciation to all involved with Citizens Advice Direct; the above achievements would not be possible without you and your efforts. As this year progresses and with the current climate your input becomes even more invaluable.

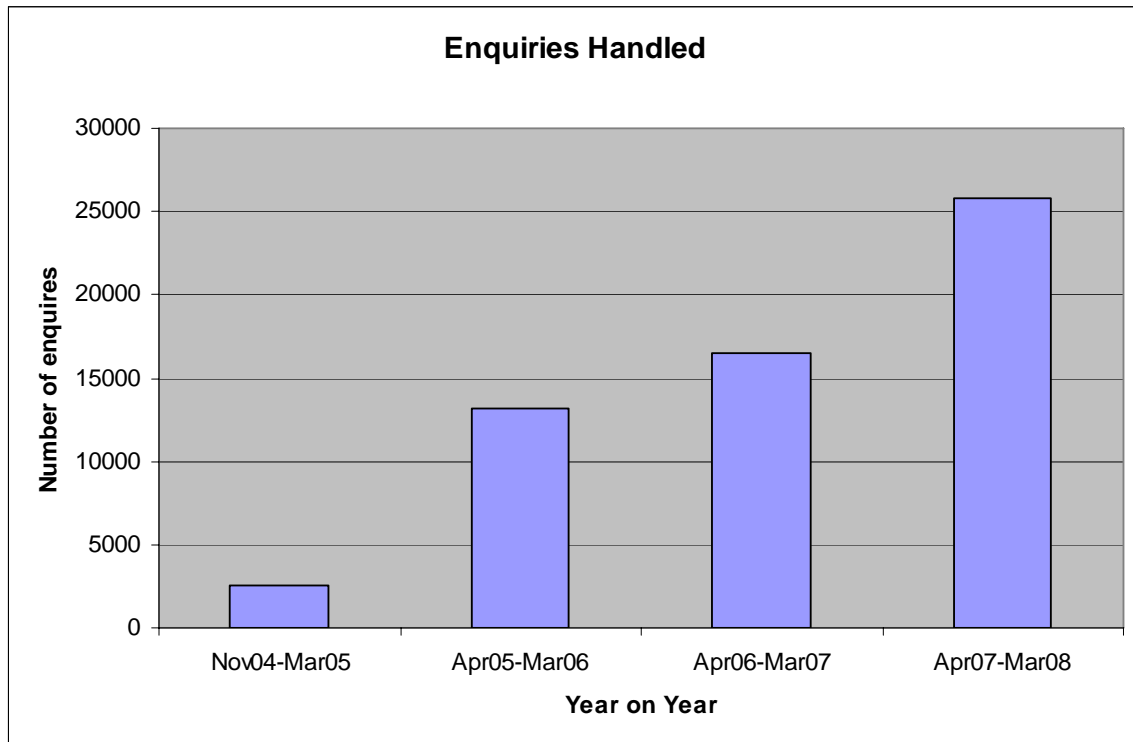
I look forward to your continued support over the next year, in the knowledge that there are challenges to overcome, however with the confidence that Citizens Advice Direct is making every effort to increase the access to those who need it most. Citizens Advice Direct is definitely 'Hear to help!'

Kirsteen McDonald
Chief Executive

Review of Activities

Operations

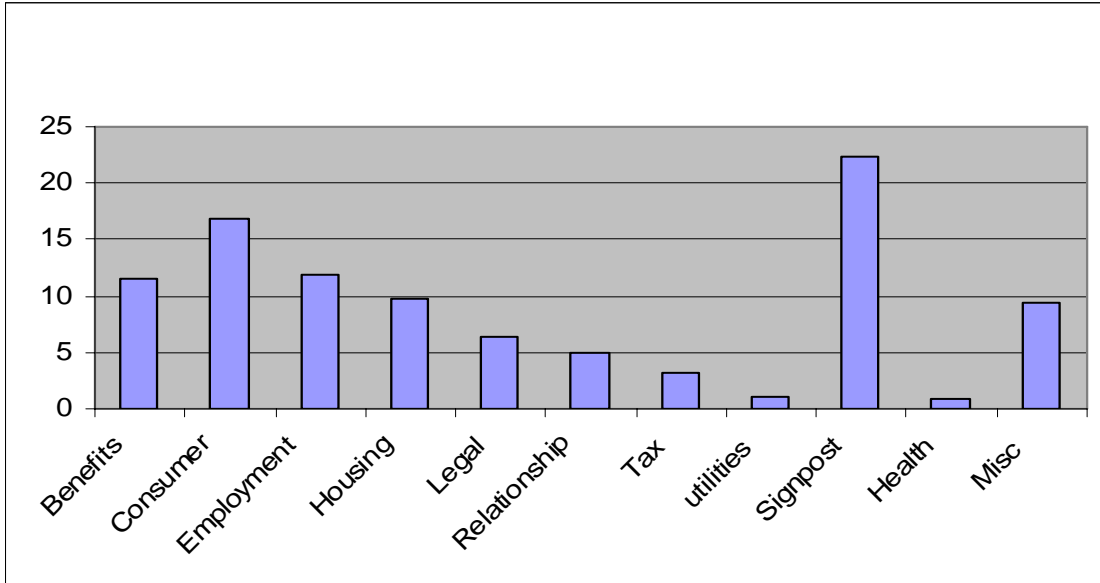
The service is available Monday to Friday 9.00am to 8.00pm and Saturday 10.00am to 2.00pm. In 2007/08 the service assisted over 26,500 clients with a variety of different issues from debt to employment and homelessness to consumer issues.



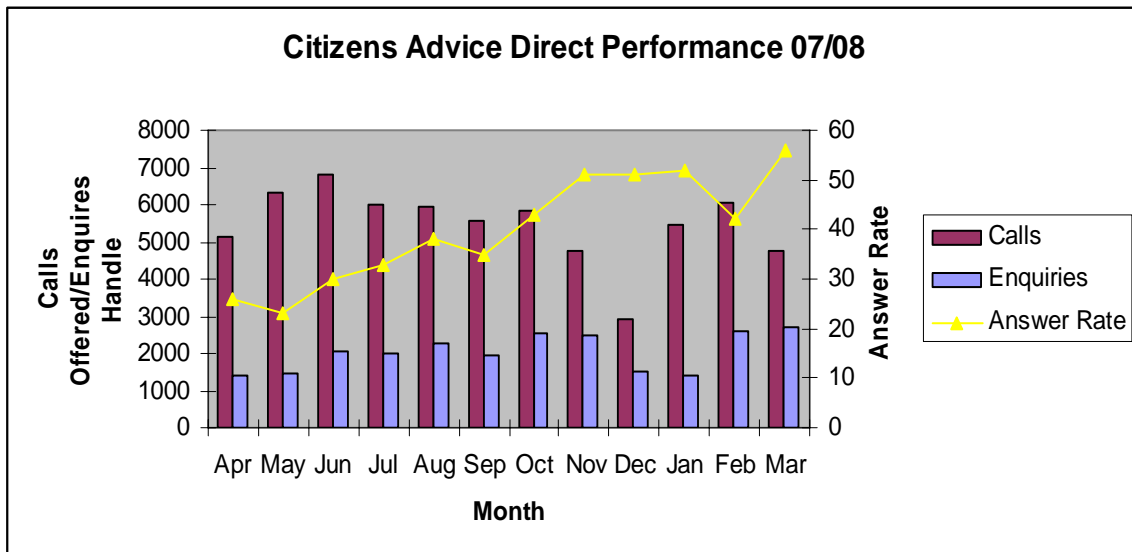
The service has already been successful in attracting a younger client group than the traditional CAB service. Over 64% of callers are under 45 compared with only 45% who use the face to face service. In order to reach even more young people, the service has secured funding from the Big Lottery to implement a targeted campaign aimed specifically at school leavers and students.

Issues relating to employment account for nearly 20% of the enquiries to Citizens Advice Direct, again without any specific marketing to attract them. Overall 45% of clients that have contacted Citizens Advice Direct so far have been in employment. The employment enquires can include redundancy, bullying in the workplace, terms and conditions, disciplinary / grievance / dismissal. For clients who are not working, the enquiries focus on the impact of getting a job for the first time, including coming off incapacity benefit, National Minimum Wage.

Below is a breakdown of the issues presented to Citizens Advice Direct.



In the 2007/08 the service has improved its call centre technology which has enabled it to record more accurate statistics on calls offered, enquiries handled and the relevant answer rate. Below is a chart of the improved answer rate.



The Volunteers



Volunteers play a critical role in the service and many of them are volunteering for the first time, hoping to develop skills and experience that can assist them to find employment and/or to improve their social life. Citizens Advice Direct has attracted over 73 new volunteers since April 2007.

Over all the service has recruited and trained over 250 volunteers since November 2004. Through the training and support volunteers are actively encouraged to seek employment; Citizens Advice Direct subscribes to most job papers and encourages the use of employment internet sites such as s1jobs, monster and goodmoves. To date, 20% of our volunteers have secured full time employment.

The volunteers:

- The age profile of volunteers within Citizens Advice Direct is younger than in traditional CABx
- One in three is in employment, volunteering in the evenings or on a Saturday.
- The training can be flexible, aiming to fit in with the volunteers commitments.

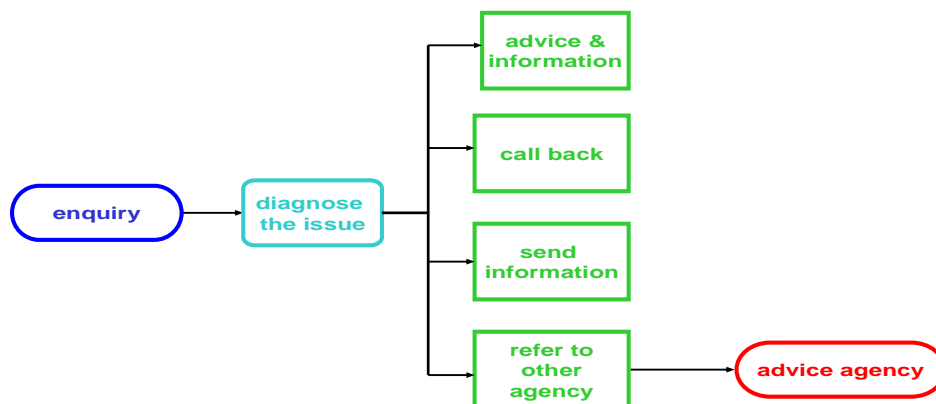
- Followed by a period of shadowing more experienced advisers to build skills in listening to and taking live calls.
- Assessed by a Team Leader and after 6 months of competent advice giving they gain a certificate in Advice Giving in recognition of their achievements.
- Volunteers commit 6 hours a week between the hours of 9am-8pm Monday-Friday and 10am-2pm Saturday.

Volunteers are offered the opportunity to further develop their skills in areas such as tutor training, IT skills, telephone and active listening skills and customer service. More experienced volunteers are offered the opportunity to mentor new trainees, which further develops their skills and confidence.

To support volunteers actively seeking employment, Citizens Advice Direct subscribes to most job papers and encourages the use of employment internet sites such as s1jobs, monster and goodmoves. To date, 20% of our volunteers have secured full-time employment.

The Triage Process

The advisers operate a system of telephone triage which allows clients who require advice and information to be dealt with effectively by telephone while those who require face-to-face advice or on-going assistance to be quickly identified and signposted or referred on to the appropriate agency depending on their needs.



Partners

Citizens Advice Direct is committed to enabling clients to access the most appropriate service for their circumstances. It is recognised that by working with Citizens Advice Bureaux or other service providers, clients receive a better and more seamless service. These working partnerships are being developed through referral and signposting systems and networks. These closer working relationships use the strengths of all partners and complement each other services.

Citizens Advice Direct in 2007/2008 concentrated on expanding the service to complement and enhance the service to the citizens and the Bureaux who want a telephone service. The service is now working with a third of the Scottish Bureaux. This has benefited clients as they have had the opportunity for ongoing assistance should they require it. During the year, 13% of clients were signposted and 2% were referred directly to Bureaux. The aim is to maintain these working relationships and continue to expand the service across Scotland over the next 3 years.

The service has also undertaken service provision for other organizations on a contract basis. These projects include:

- Highland Homeless Advice Line giving housing and related advice to those facing homelessness in the Highlands, Highland Council and Homepoint.
- Tax credits help line for Citizens Advice England and Wales in conjunction with HMRC. Citizens Advice England has commissioned a six month out of hours pilot service from Citizens Advice Direct, specifically focusing on giving advice and support on working tax credits and child tax credits.
- Glasgow Advice and Information Network - GAIN - Citizens Advice Direct provides a telephone service for all members of GAIN, giving information and advice on debt and associated issues. The network comprises of 27 different money advice agencies
- The Elder Abuse Helpline Network (EAHN). Is a network of 11 established and experienced helplines operating in Scotland. The role of the EAHN is to train our helpline advisors to be aware of the types of abuses elderly people can experience, how to deal with such calls and promote partnership working.

In consortium with Bureaux

- Independent Advice and Support Services - IASS - Greater Glasgow & Clyde NHS and Citizens Advice Bureaux Consortium have launched the Independent Advice and Support Service which enables independent NHS complaints handling and support on related issues to provide a holistic approach. Citizens Advice Direct will provide the frontline telephone service for the project.
- Poppyscotland - provides a one-stop advice service in Glasgow, to enable veterans (ex-service personnel), their carers and immediate family members (partner and dependents) living in Glasgow to receive an enhanced level of advice on a wide range of issues delivered via a single service.

Citizens Advice Direct has also worked with The Scottish Helpline for Older People (SHOP) providing them with training on delivering telephone services.

Fundraising

Citizens Advice Direct has secured core funding from the Scottish Government from April 2007-2011. This is to develop the Citizens Advice Direct service across Scotland. In addition, project funding has been granted by the Big Lottery Fund for 5 years, to enable the service to target specific groups who would not normally access the Citizens Advice Service. This project will focus on young people and people in employment with employment issues and will also aim to recruit at least 750 volunteers.

The project funded by Comic Relief, to enhance and build the capacity of existing helplines to deal with enquiries relating to elder abuse, will continue until January 2009. An application for continuation funding until 2012 is being considered at present.

The Glasgow Advice and Information Network helpline is in its second year of funding and the tendering process for this service is underway. This service provides money advice to residents living and working the Glasgow area. This project works in conjunction with Glasgow City Council and the GAIN network.

Future plans

Citizens Advice Direct aims to develop a Scotland wide advice service that will allow more clients to access advice and provide an extended out of hours service. The Scottish Government has given the service funding over the next three years from April 2008-March 2011.

We aim to improve the service further by investigating how access to advice can be improved for clients, for instance by piloting instant messaging and texting, through our website to reach a younger client group. Also part of this development is to investigate the potential for volunteers to work remotely and thus enable people, like carers and people with disabilities, who would have difficulty accessing volunteering, the opportunity to volunteer.

To achieve this, Citizens Advice Direct will work in partnership with the network of Citizens Advice Bureaux and the other community advice agencies, which may benefit from this service. Combining the benefits of the easily accessible Citizens Advice Direct service with the local advice agencies in the community, aims to provide clients with a service that is easily reached and offer them a route to on-going support should they require it.

Citizens Advice Direct aims to increase its capacity for assisting clients to over 118,000 per year in the next five years. To do this the volunteer numbers need to increase to a core of over 120. Training programmes have been evaluated and modified to accommodate as many volunteers as possible. As well as working with CABx and advice agencies Citizens Advice Direct plans to offer its services to other community organisations to provide a central point of referral for advice and information.

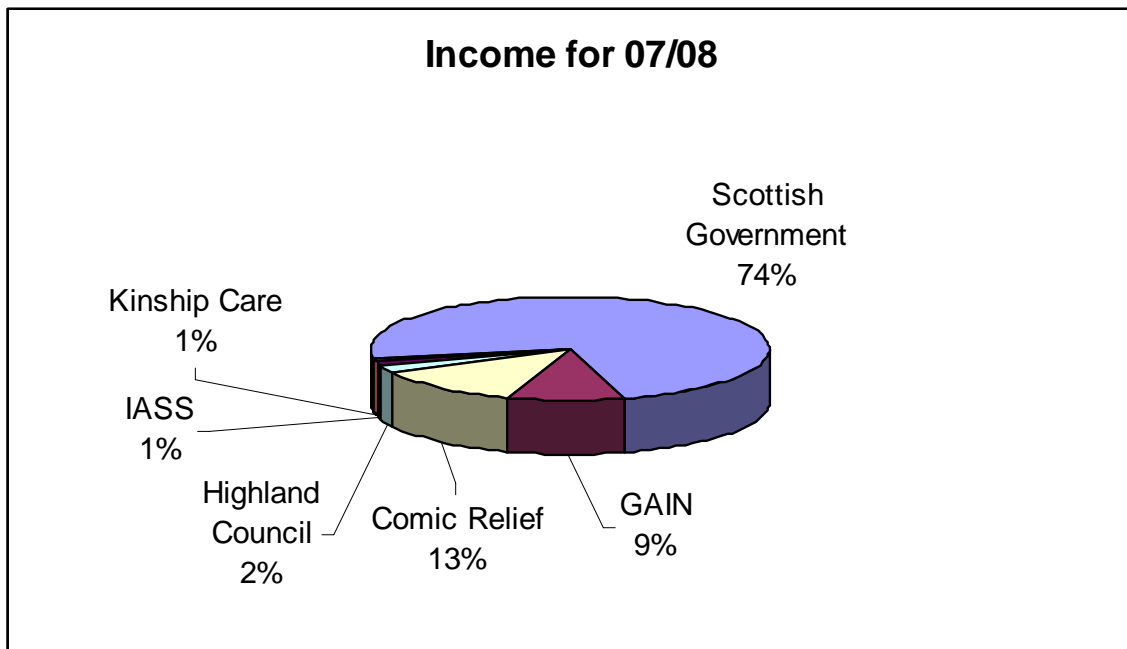
Citizens Advice Direct has established itself as a model of best practice in advice delivery by telephone. The service in Glasgow has been successful in dealing with clients' enquiries and providing volunteering opportunities and now will expand this across Scotland. Ultimately Citizens Advice Direct aims to establish a sustainable Scottish telephone advice service.

Treasurer’s Report

For the year ended 31st March 2008

Citizens Advice Direct continues to maximise and make the best use of its income and is extremely grateful to all the funders who have made an investment in the work of the service

The rise in income reflects a significant achievement for the organisation with significant efforts taken to identify a core funding source, The Scottish Government, whilst simultaneously maintaining focus the other service delivery objectives.



- The Scottish Government funds to the Management Team, 5 part time members of staff, the expenses of 80 volunteers and the running costs of the helpline.
- Comic Relief gave funding to increase awareness of Elder Abuse to a network of helplines.
- Glasgow City Council provided funding to launch a telephone service for all members of Glasgow Advice and Information Network (GAIN) providing information and advice on debt and associated issues. The network comprises of 27 different money advice agencies.

- Homepoint and Highland Council provided funding for a homeless advice line for in the Highland
- IASS – The Independent Advice and Support service provides funding for a helpline for people who need advice and assistance with enquiries relating to the NHS.
- Kinship Care is a project funded by the Scottish Government to provide a helpline for people needing advice on who is a kinship carer and how to claim the relevant payments.

Thanks

The Directors of Citizens Advice Direct would like to thank its Funders for their support, its volunteers for their commitment, and its staff for their hard work and creativeness.

Constitution

Advice Direct Limited is a company limited by guarantee and a registered charity governed by its memorandum and articles of association. The company trades under the name of Citizens Advice Direct. Charity number: SC 034473. Company number: 225689

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Directors

The Directors serving during the period and since the year end were as follows:

Name	Title	Appointed or resigned
Kirsteen Gunnion	Chief Executive	Appointed May 2007
Bruce Collier	Chair	
James Patrick McAleese	Vice Chair	
Allan Fyfe	Treasurer	Resigned October 2008
Roderick McPherson	Secretary	
Ashok Sehgal		
St John Hattersley		
Angus MacKenzie	Volunteer Director	
John Prior	Volunteer Director	Resigned November 2007
Heleen Kist		Appointed February 2007
Anne Hastie		Appointed February 2007
Ceinwen Lombardi	Volunteer Director	Appointed February 2008

None of the directors had any notifiable interest in the company at any time during the year.

Finance Report

ADVICE DIRECT SCOTLAND LIMITED

(a company limited by guarantee)

BALANCE SHEET

As at 31 March 2008

	Notes	2008	2007
		£	£
Fixed Assets			
Tangible Assets	9	18,547	3,182
Current Assets			
Debtors	10	140,471	23,018
Cash at bank and in hand		94,826	187,545
		<u>235,297</u>	<u>210,563</u>
Creditors: Amounts falling due within 1 year	11	<u>(39,629)</u>	<u>(35,875)</u>
Net current assets		<u>195,668</u>	<u>174,688</u>
Total assets less current liabilities		<u>214,215</u>	<u>177,870</u>
Funds			
Unrestricted funds			
General funds		90,624	70,560
		<u>90,624</u>	<u>70,560</u>
Restricted Funds	15	<u>123,591</u>	<u>107,310</u>
		<u>214,215</u>	<u>177,870</u>

These financial statements are prepared in accordance with the special provisions of Part VII of the Companies Act 1985 relating to small entities.

Income and Expenditure

ADVICE DIRECT SCOTLAND LIMITED

(a company limited by guarantee)

17 INCOME & EXPENDITURE ACCOUNT

For the year ended 31 March 2008

	General Funds 2008 £	Restricted Funds 2008 £	Total Funds 2008 £	Total Funds 2007 £
Income				
Grants & Donations	16,852	403,854	420,706	325,078
	16,852	403,854	420,706	325,078
Other Income				
Interest Received	6,158	-	6,158	4,474
	23,010	403,854	426,864	329,552
Expenditure				
Expenditure	4,312	386,207	390,519	283,840
	4,312	386,207	390,519	283,840
Surplus for year	18,698	17,647	36,345	45,712
Transfer to other projects	1,366	(1,366)	-	-
Net Income less Expenditure	20,064	16,281	36,345	45,712
Surplus brought forward	70,560	107,310	177,870	132,158
Surplus carried forward	90,624	123,591	214,215	177,870

All the results of the company relate to continuing operations.