



## Annual Report

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## Background

Citizens Advice Direct is a telephone advice service based in Glasgow. Established to develop ways in which advice and information could be made more accessible, the service provides generalist advice as part of the Citizens Advice Network in Scotland.

Many people find accessing advice services to be problematic. This is particularly true for the elderly, disabled or housebound. It also applies to those who cannot afford transport or childcare costs or who are at work during normal service opening hours. Citizens Advice Direct opens up advice services to those who have previously been excluded by their social or geographical circumstances. It empowers people by providing them with the information and assistance they need to assert their rights as citizens.

The helpline has been established in partnership with local Citizens Advice Bureau, Glasgow City Council and Citizens Advice Scotland. Through these partnerships, clients are signposted and referred to local services when appropriate or requested. At a national level, Citizens Advice Direct has worked with Macmillan Cancer to deliver an advice line to assist those affected by cancer and with Age Concern and the Vulnerable Adults Alliance to develop joint working between helpline services.

## 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

## Review of Activities

### Fundraising

Citizens Advice Direct has secured additional funding from Highland to extend the Homeless Advice Line to people in the Highlands until March 2007. Comic Relief has awarded the service funding to enhance and build the capacity of helplines who deal with enquiries relating to elder abuse. Also a two year project is underway with Glasgow Advice and Information Network (GAIN) to provide money advice to residents living and working the Glasgow area. This project works in conjunction with Glasgow City Council and the GAIN network.

An application has been submitted to the Big Lottery for a five year project to target and assist young people, people in debt and those who have employment related issues. Also Citizens Advice Direct is now seeking a partnership with and funding from the Scottish Executive.

### Operations

The helpline has been operational since November 2004 and is available Monday to Friday 9am to 8pm and Saturday 10am to 2pm. The service now offers email advice through the website. The volunteer 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 referred on to the appropriate agency. To date we have assisted over 27,000 clients by telephone and email.

This system of delivering advice has been recognised as a model of good practice. In particular, Citizens Advice Direct has been nominated by the Telephone Helplines Association for an award in the category of Multiple use of Technology. Last year the organisation was awarded runner up in Research Demonstrating .

Citizens Advice Direct has recruited and trained 75 volunteer advisers over the past year and 8 paid employees. Advice Direct is currently running an out of hours project for Citizens Advice England employing a further 4 paid temporary employees.



## Evaluation

In a recent independent evaluation of the service delivery was very successful and noted the following positive outcomes:-

- 90% said they got through first time
- 95% said the advisor listened well
- 85% said adviser clarified their issue
- 91% said the information given was useful
- 90% said they were satisfied with the service
- 95% said they would recommend the service

## 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 has also developed and provided specialist advice services in partnership with Macmillan Cancer Relief, Scottish Power, and Highland Council and has run various projects on behalf of Citizens Advice England.

Citizens Advice Direct has also helped partner organisations to develop their own helpline services by providing advice on best practice for the operation of helpline services. It assisted in the set up of the Scottish Helpline for Older People (SHOP) and helped Young Scot to develop their Information Line which assists young people.

Citizens Advice Direct has also provided training for Scottish Council for Voluntary Organizations (SCVO) & Age Concern on delivering telephone services. Future training is planned for Highland Council on Homelessness, Private Housing and Matrimonial Homes.

## Directors

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

Bruce Collier  
James Patrick McAleese  
Roderick McPherson  
Allan Fyfe  
St John Hattersley  
Angus MacKenzie  
Sandra Moore (resigned October 2006)  
Donna MacKinnon (joined November 2006)  
Michael McTernan (resigned April 2006)  
Kirsteen Gunnion (joined April 2006)

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

## Future plans

Citizens Advice Direct has established itself as delivering a best practice model of advice delivery by telephone. The pilot service in Glasgow has been successful at dealing with clients enquiries and providing volunteering opportunities.

Citizens Advice Direct will continue to look for new ways to engage people in the advice giving process by developing partnerships with other agencies and further referral systems. Ultimately Citizens Advice aims to establish a sustainable national telephone advice service.

## Thanks

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



## Finance Report

### STATEMENT OF FINANCIAL ACTIVITIES (Incorporating an Income & Expenditure Account) For the year ended 31 March 2006

	Note	General Funds £	Restricted Funds £	2006 Total £	2005 Total £
<b>Incoming resources</b>					
Incoming Resources from Generated Funds					
Voluntary Income	2	289	0	289	202,047
Investment income - Interest receivable		3,386	0	3,386	2,798
Incoming Resources from Charitable Activities	2	34,737	242,593	277,330	0
<b>Total Incoming Resources</b>		<b>38,412</b>	<b>242,593</b>	<b>281,005</b>	<b>204,845</b>
<b>Resources Expended</b>					
Costs of Generating Funds	3	615	33,285	33,900	8,642
Charitable Activities	3	10,611	201,569	212,180	150,756
Governance Costs	3	1,139	17,663	18,802	15,285
<b>Total Resources Expended</b>		<b>12,365</b>	<b>252,517</b>	<b>264,882</b>	<b>174,683</b>
Net incoming resources before transfers		26,047	(9,924)	16,123	30,162
Gross transfer between funds		5,507	(5,507)	0	0
Net Incoming Resources after transfers for the year		31,554	(15,431)	16,123	30,162
Fund balances 1 April 2005		36,559	79,476	116,035	85,873
Fund balances 31 March 2006	15	68,113	64,045	132,158	116,035

**BALANCE SHEET**  
As at 31 March 2006

	Notes	£	2006 £	2005 £
<b>Fixed Assets</b>				
Tangible Assets	9		15,665	21,978
<b>Current Assets</b>				
Debtors	10	20,687		2,708
Cash at bank and in hand		112,884		123,288
		133,571		125,996
<b>Creditors:</b> Amounts falling due within 1 year	11	(17,078)		(31,939)
<b>Net current assets</b>			116,493	94,057
Total assets less current liabilities			132,158	116,035
<b>Funds</b>				
<b>Unrestricted funds</b>				
General funds			68,113	36,559
			68,113	36,559
<b>Restricted Funds</b>	15		64,045	79,476
			132,158	116,035