



Annual Report 2005

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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

Advice Direct has secured additional funding from the Citizens Advice Scotland Development Committee in order to develop the Citizens Advice Direct service beyond the Glasgow pilot. In addition, grants have been received from Homepoint and the Highland Council to deliver advice to people affected by homelessness and from the



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European Social Fund to extend the effectiveness and extent of referrals to local agencies.

Operations

The telephone helpline has been operational since November 2004. The service is now available Monday to Friday 9.00am to 8.00pm and Saturday 10.00am to 2.00pm. 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.

This system of delivering advice has been recognised as a model of good practice. In particular, Citizens Advice Direct was short listed for a Research award from the Telephone Helplines Association for the research which led to the development of this service delivery method.

This service delivery model has allowed Citizens Advice Direct to attain the following levels of service:

- 90% of enquiries resolved over the telephone
- 95% of calls answered
- 99% of clients satisfied with the service
- Referral and signpost of clients to local bureau for on going assistance and/or face-to-face advice.
- Delivery of telephone services and training for other organisations.

Citizens Advice Direct has recruited and trained 82 volunteer advisers over the past year and 7 paid employees are employed by the organisation.

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.



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Where appropriate, Citizens Advice Direct has also developed and provided specialist advice services in partnership with Macmillan Cancer Relief, Scottish Power and The Highland Council.

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 Age Concern when it was setting up the Scottish Helpline for Older People (SHOP) and helped Young Scot to develop their Information Line which assists young people with money issues.

Citizens Advice Direct has also worked with groups, such as the Scottish Council for Voluntary Organisations (SCVO), providing them with training on delivering telephone services.

Directors

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

George Graham (resigned 2005), Ashok Sehgal, Bruce Collier, Sarah Brown (resigned 2006), Ginny Jackson, Jean Cheyne, James Patrick McAleese, Angus MacKenzie, St John Hattersley, Michael McTernan, Roderick McPherson and Allan Fyfe (co-opted 2005).

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. Work is also underway to offer advice using text, email and online advice services. Ultimately Citizens Advice aims to establish a sustainable national telephone advice service.



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Thanks

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

Finance Report

BALANCE SHEET

As at 31 March 2005

	Notes	£	2005 £	2004 £
Fixed Assets				
Tangible Assets	9		21,978	933
Current Assets				
Debtors	10	2,708		375
Cash at bank and in hand		<u>123,288</u>		<u>88,408</u>
		125,996		88,783
Creditors: Amounts falling due within 1 year	11	<u>(31,939)</u>		<u>(3,843)</u>
Net current assets			<u>94,057</u>	<u>84,940</u>
Total assets less current liabilities			<u><u>116,035</u></u>	<u><u>85,873</u></u>
Funds				
Unrestricted funds				
General funds			36,559	36,162
			<u>36,559</u>	<u>36,162</u>
Restricted Funds	14		<u>79,476</u>	<u>49,711</u>
			<u><u>116,035</u></u>	<u><u>85,873</u></u>

Income and Expenditure

INCOME & EXPENDITURE ACCOUNT

For the year ended 31 March 2005

	General Funds 2005 £	Restricted Funds 2005 £	Total Funds 2005 £	Total Funds 2004 £
Income				
Grants & Donations	50	201,997	202,047	125,642
	50	201,997	202,047	125,642
Other Income				
Interest Received	2,798	0	2,798	470
	2,848	201,997	204,845	126,112
Expenditure				
Expenditure	7,008	167,675	174,683	40,239
	7,008	167,675	174,683	40,239
Surplus for year	(4,160)	34,322	30,162	85,873
Transfer to other projects	4,557	(4,557)	0	0
Net Income less Expenditure	397	29,765	30,162	85,873
Surplus brought forward	36,162	49,711	85,873	0
Surplus carried forward	36,559	79,476	116,035	85,873