
Fair Accessible Inclusive Relevant



The Citizens Advice service equality
and diversity strategy 2004 – 2008

Foreword

In May 2004 Citizens Advice approved a new service-wide strategic plan for the period to April 2008.

The plan has five objectives:

- ▶ To meet the needs of as many people as possible.
- ▶ To have a greater influence on policy.
- ▶ To innovate and develop new services.
- ▶ To improve funding.
- ▶ To develop all our people.

The strategic plan commits the service to:

- ▶ making equality and diversity part of all we do
- ▶ taking the necessary steps to become a first point of access for help on discrimination for all disadvantaged people.

This equality and diversity strategy shows how we will put these commitments into practice within each of the five objectives. It should be read in conjunction with the Citizens Advice strategic plan.

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A better future

We want...

- ▶ people of all communities in England and Wales to know they can rely on the Citizens Advice service for high quality advice that is accessible, inclusive, and responsive to their needs
- ▶ all our work to be relevant to and valued by all parts of the community, including people who experience discrimination and exclusion.

Because...people are our business

Equality, fairness and diversity are all about people, their contributions, needs and rights. People are our business and therefore promoting equality and valuing diversity is not an optional addition to the Citizens Advice service. It is not something we can choose to do or not do. It is something that we exist to do. It is our core business.

The Citizens Advice service is all about people working together to resolve or manage serious problems, overcome societal barriers to accessing rights, and address the underlying causes.

As a service we are experienced at working with many groups of people, for example people living in poverty, long-term unemployment, or rural isolation. This is vital work, and research shows that some people from these groups know they can rely on us.

There are some people whose poverty, lack of access to rights and services, and inability to express their needs, are affected or made worse by discrimination, stigma, and prejudice. Many bureaux have made significant progress in developing our understanding of how best to work with these communities. But there is much more to be done. People from these groups are less likely to know that the CAB service is there for them too – as potential clients, volunteers or paid staff. They are less likely to be able to

Section 1 – A better future

access other services. And we still have much to learn in order to make sure they are as included, and our work as relevant to them, as to anyone else.

As a holistic service, open to all, we need to reach out to and work with all parts of the community if we are to deliver our core service and achieve our aims.

To make it happen we will...

- ▶ become a first local point of contact for discrimination advice
- ▶ take into account – in all aspects of our work – the causes of discrimination, prejudice and social exclusion and their impact on many people and groups. For example poverty, rural isolation, race, ethnicity, disability, mental health, sexual orientation, age, religion, nationality, gender, language and basic skills needs, HIV status, or any combination of these factors
- ▶ develop strategic partnerships with other agencies so that we can best help our clients and communities.

This is said in a different way, but with the same essential meaning, in our corporate strategic plan 2004 – 2008, which commits the service to:

- ▶ making equality and diversity part of all we do
- ▶ taking the necessary steps to become a first point of access for help on discrimination for all disadvantaged people.

A simpler way of summing up how we want to be is...

- Fair
- Accessible
- Inclusive
- Relevant

What equality, fairness and diversity mean in the Citizens Advice service

Equality and diversity are inextricably linked: we are all different or diverse, and yet we all share a common, equal humanity. Our common humanity makes us equal in worth and rights. The visible and non-visible differences between people make our diversity.

The fact of our common humanity and diversity does not change over time. But perceptions do. The balances and imbalances in power between people create fairness and unfairness in the way society approaches different groups of people. It determines whether society treats them as being equal in rights and worth or not. This changes over time, according to changes in politics, economics, fashion and societal norms.

In promoting equality we focus on people's right to equal treatment in law and in practice, challenging injustice and discrimination. In promoting fairness we seek to acknowledge and address traditional and current imbalances in access to power and resources. By valuing diversity we are recognising the positive contribution which our differences make to the richness of our society and the effectiveness of our organisations.

The concepts of equality, fairness and diversity are essential to the work of the Citizens Advice service. We promote equality and fairness and value diversity. This helps us be employers people want to work for, charities volunteers want to belong to, advice givers clients trust, and campaigners who challenge the disadvantage and discrimination that many people – including our clients, volunteers and staff – face.

Section 2 – What equality, fairness and diversity mean

2.1 Equality and fairness in practice

Equality and fairness do not mean providing the same service in the same way to everybody. They do not mean allocating resources on the basis of crude numbers alone. Equality and fairness mean treating people equitably, respecting them, their equal rights and their dignity. They mean taking into account the complexities and nuances of power relations, needs, and natural justice. They mean making the best decision possible in the circumstances.

It is not fair to treat people differently when in relevant ways they are similar. For example, disabled and non-disabled clients both want to be treated in a friendly, professional manner by advice agencies. It is not fair to give one person entering a bureau a welcoming smile and another person a worried or embarrassed look that gives the message 'oh, what are you doing here?'

It is not fair to treat people similarly when in relevant ways they are different. For example, in a bureau that is well-established in serving the local white community, a smile will probably be enough for most white clients to feel welcome and safe when they arrive. In the same bureau, where initial steps have recently been taken to establish links with, for example, the Somali community, it may need more than a smile to make Somali clients feel welcome and safe, and the receptionist may need to take more time with them.

Fairness in that situation is both making sure both white and Somali clients feel welcome, and doing different things for them if necessary in order to achieve that aim.

Fairness is also recognised in the advice we give. It is not fair to give everyone the same information when that information is based only on one group of people's experiences and needs. Advice is tailored to the needs of the individual, identifying the rights that they are entitled to in their specific circumstances, and the barriers they may face. It is fair to have a range of information and advice available that takes into account people's differences.

Advice methods are also tailored, giving the advice in a place and way that best meets the client's needs. It is not fair or effective to provide information in the same way to everyone when that way is based on suiting one group's circumstances and ignores other groups' circumstances. For example, it is as unfair to expect someone who only speaks English to get advice in British Sign Language as it is to expect someone who only speaks British Sign Language to get advice in English. It is fair to recognise that different people have different communication needs, all people are equal in rights and worth, and all have the right to services in their language.

2.2 Diversity in practice

We recognise that people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions. We encourage and harness these differences to make our services relevant and approachable. We draw upon the widest possible range of views and experiences, so we can listen to, and meet, the changing needs of our users, staff, volunteers, partners and supporters.

Managing diversity as an employer and volunteer organisation enables us to reflect the diversity of our communities and to harness these differences. This creates a productive environment in which everybody feels valued, where talents are fully utilised and in which organisational goals are met.

Managing diversity as a service provider enables us to respond effectively to both the similar and different needs of different people while respecting their human rights and dignity.

3

The case for equality and diversity in the Citizens Advice service

Put simply, the Citizens Advice service believes in equality and diversity and the benefits they bring. The many reasons for this belief can be summarised into three cases for equality and diversity. These are:

- ▶ a moral case
- ▶ a business case
- ▶ a legal case.

Our approach to equality and diversity must fully understand all three. This section examines each in turn.

3.1 The moral case: what the Citizens Advice service believes

We have a clear set of values that guide and shape all our work and ensure we stay true to our purpose. They provide a compelling moral case for action on equality and diversity.

These values commit us to:

- ▶ be fair – and promote equality
- ▶ be accessible – and embrace the positive value of diversity
- ▶ be inclusive – and foster good relations between communities
- ▶ be relevant – and challenge prejudice and discrimination.

Our values and belief in the moral case for equality and diversity means that we will not restrict ourselves to those areas which are currently covered by legislation but will:

- ▶ campaign for policy and legislative changes to meet clients' needs
- ▶ operate, as a service provider, employer, and volunteer organisation, equally and fairly to all groups.

3.2 The business case: why equality and diversity are crucial for our success

People are our business

Equality and diversity are all about people, their contributions, needs and rights. People are our business and therefore promoting equality and valuing diversity is not an optional addition to the Citizens Advice service. It is not something we can choose to do or not do. It is something that we exist to do. It is our core business.

If people are our business then in order to know how best to involve them in the service – as clients, staff and volunteers – and how best to get companies, employers and policy makers to recognise our clients' existence and respond to their needs, we have to know who they are and what their strengths, resources, and problems are.

One way of getting an idea of who people are at national level is to look at different demographic groups' population size, employment data and purchasing power, and indicators of disadvantage and exclusion. Of course this is a pretty basic way of looking at things, not least because many people belong to more than one group. But it is helpful because it stops us from leaving out of our thinking those groups of people who have traditionally been overlooked and undervalued.

Once we have this picture, we can see more clearly the benefits to the service and society of including all people.

Section 3 – The case for equality and diversity

In the UK:

- ▶ Just under 1 in 4 people – or nearly 13 million people – live in poverty, including nearly 1 in 3 children.
- ▶ Black and minority ethnic people make up 7.9% of the population.
- ▶ There are some 8.6 million disabled people. 1 million want to work but are currently unemployed.
- ▶ One in six people have a mental health problem at any one time, over 7 million people between the ages of 16 and 74.
- ▶ It is likely that around 5-10% of people are gay, lesbian or bisexual.
- ▶ The number of people over pensionable age will increase from 10.7 million in 1998 to 11.9 million in 2011.
- ▶ Women make up nearly half the workforce. In under a decade there will be two million more jobs – 80% of which will be filled by women.
- ▶ There are an estimated 5,000 transsexual people who have gone through gender reassignment.
- ▶ There are an estimated 1.7 million one-parent families in Britain – a quarter of all families.
- ▶ According to Home Office calculations, migrants, including asylum seekers and refugees, make a net fiscal contribution of approximately £2.5 billion a year to the economy.
- ▶ 1 in 4 people in the UK have basic skills needs.

The Citizens Advice service cannot achieve our aims or fulfil our objectives if we ignore or marginalise any of these potential clients, volunteers, or employees. And in fact there are significant benefits to be gained from making equality and diversity part of everything we do.

The benefits to clients and communities

Focusing on equality, fairness and diversity enables us to take into account the existence and needs of all parts of the community, not just some parts. It helps us understand and address the underlying causes of our clients' problems. It helps us negotiate apparently conflicting rights and priorities. This results in high quality services and campaigns that are relevant to a wide range of clients, and that can respond effectively to changing needs.

MORI research shows that clients need greater flexibility as to when and how they access services, for example by telephone at weekends. A diverse workforce, supported by flexible working policies (such as non-traditional hours), is better able to respond to this need.

Our clients' lives are affected by a whole raft of government equality, fairness and diversity agendas, e.g. initiatives to promote community cohesion and civic renewal and to tackle social exclusion and poverty; the expansion of anti-discrimination legislation; and the development of the Commission for Equality and Human Rights (CEHR). We need to understand, and be able to influence, these agendas in the interests of our clients and their communities.

The benefits to Citizens Advice service

Improving recruitment and retention. The face of the workforce is changing. By 2010 only 20 per cent of the workforce will be white, male, non-disabled and under 45. In many areas we operate in the Citizens Advice service already has difficulty filling vacancies and recruiting volunteers. High quality job applicants and volunteers (including those from BME, disabled, and LGBT communities) expect employers to have a strong track record on equality and diversity. In the current job market they can afford to pick and choose. Good equality and diversity practices also enhance how loyal people feel to an organisation and reduce turnover.

Increasing organisational effectiveness and relevance. Research shows that good equality and diversity practices improve organisational effectiveness, increase workforce motivation and efficiency, and strengthen values within the organisation. Diverse teams are more creative, more innovative and make better decisions, leading to more relevant campaigns and services.

Section 3 – The case for equality and diversity

Improving finances. Funders see having good equality and diversity practices as an indicator of a modern, forward-thinking organisation that makes its work relevant to all those who need it, and that can be trusted by the public. Funders support organisations that work in partnership with others and that actively involve the communities they seek to help in decision-making and developing and delivering services.

Good equality and diversity practice helps save money, reducing staff and volunteer turnover, litigation and stress, and improving reputation. Bad practice is an expensive luxury most organisations can no longer afford.

3.3 The legal case: what the law says

The service, like any other organisation, is subject to law. Even if we ignore all the good reasons to make equality, fairness and diversity part of all we do (i.e. the moral and business cases) we cannot ignore the legal case and our legal obligations. And because of our aims and values, it is even more vital that we both comply fully with the law and are able to demonstrate compliance.

Our values go well beyond our legal obligations. We recognise shortcomings in the current law, which still permits discrimination on grounds of sexual orientation, religion and belief, and gender identity in all areas other than employment; and all forms of age discrimination.

UK equality legislation outlaws discrimination in employment on the grounds of sex, gender reassignment, race, religion or belief, disability and sexual orientation. From 2006 it will include age. It outlaws discrimination in service provision on the grounds of race, gender and disability. This will be extended to include religion, probably in 2005. Equality legislation also requires employers and service providers to make reasonable adjustments to enable disabled people's employment and their access to services and premises.

Under Article 14 of the Human Rights Act (HRA), public authorities and those carrying out a public function may not treat any individual differently, in respect of any of the other rights they are guaranteed under the HRA, because of race, religion, sex, political views or any other status, unless this can be justified objectively.

A baseline against which to measure progress

A baseline exercise will be conducted as one of the first activities of the Equality and Diversity strategy. It will identify current strengths, weaknesses, opportunities and threats, and capture the key quantitative and qualitative data currently available, including results of the MORI research. We will use that information to set targets and measure progress. The baseline exercise will propose ways to fill any identified gaps in data.

4.1 Client diversity and satisfaction

We are not currently able to track the diversity of clients at national level. The introduction of the new computerised casework recording system (CASE) and the proposed requirement in the revised membership scheme for bureaux to record clients' self-identified ethnicity and disability will enable us to start gathering and analysing this and other demographic data that many bureaux already routinely capture such as gender, age, income or employment status.

Data from MORI shows:

- ▶ overall clients' net satisfaction with the Citizens Advice service is 70%
- ▶ BME clients' net satisfaction with the Citizens Advice service is 50%
- ▶ 46% of Black and Asian people do not turn to Citizens Advice Bureaux for help
- ▶ 61% of overall clients' and 56% of BME clients' problems resolved or partially resolved by a CAB
- ▶ the main barriers to BME people using the service are the same as for white people: waiting times, inconvenient location, inconvenient opening hours, couldn't get through on phone.

Section 4 – The baseline against which to measure progress

4.2 Diversity within bureaux

The annual Bureau Information Survey enables us to track the diversity of employees, trustees and other volunteers. In 2002/03 5.5 per cent of trustees, 7 per cent of other volunteers and 10 per cent of staff were from BME communities (not including Irish people), and 7 per cent of trustees, 9 per cent of other volunteers and 5 per cent of staff were disabled. Men were over-represented as trustees and under-represented as other volunteers and staff. BME and disabled people are under-represented in management roles and governance structures. As of 2003/04, we will be able to report on data by region and staff grade.

4.3 Diversity within Citizens Advice

In 2004, 2.4 per cent of Citizens Advice staff identify themselves as disabled, and 15 per cent are from BME communities. This is in the upper quartile of performance for the voluntary sector, but still leaves significant room for improvement. BME and disabled people are under-represented in management roles and we need to further promote their involvement in governance structures. The new HR monitoring system will give more detailed demographic analysis by region, grade and issue (e.g. recruitment, grievance, leaving).

Policy commitment to best practice

The Citizens Advice service is committed to providing a supportive and inclusive culture for all those who need our services, our volunteers, our staff, our partner organisations and other stakeholders. We recognise the positive value of diversity, promote equality and fairness, and challenge discrimination.

We welcome our legal duties not to discriminate as a service provider and an employer. We aim to go beyond the narrow scope of legislative compliance and follow best practice, making equality, fairness and diversity a fundamental part of all our activities.

We recognise and will seek to address the many reasons why people or groups may be discriminated against or excluded, for example poverty, rural isolation, race, ethnicity, disability, mental health, sexual orientation, age, religion, nationality and gender.

5.1 Members of the community can expect their CAB to:

- ▶ be publicly identified as a champion of equality and diversity
- ▶ seek partnerships with other organisations that share those values
- ▶ understand and seek to serve the needs of its community, particularly those within it most likely to experience exclusion, disadvantage and discrimination.

5.2 People who need to use the Citizens Advice service can expect to:

- ▶ be able to access the service in ways that suit them
- ▶ be given help that is relevant to their problem and situation

Section 5 – Policy commitment to best practice

- ▶ be treated fairly, with dignity and respect, and without discrimination
- ▶ have their needs listened to, and met whenever possible.

If clients believe they have been subject to discrimination in accessing or receiving services from the Citizens Advice service, we would urge them to use the CAB complaints procedure. This has a number of stages, including consideration by the chief executive of Citizens Advice and, following that, an external adjudicator. As well as dealing with the issue raised, we will seek to learn from the complaint and take action to improve our services to prevent the problem happening for other clients.

People who use the service have a responsibility to treat others with dignity and respect and without discrimination. Those who do not may be denied access to our services.

5.3 Staff can expect to:

- ▶ be treated fairly, with dignity and respect, and without discrimination, in an environment where inappropriate behaviour is not acceptable
- ▶ be given opportunities to enable them to develop their potential
- ▶ be able to ask questions and develop their knowledge of equality and diversity issues in an open and constructive learning environment
- ▶ be in a healthy and safe environment free from hazards
- ▶ be able to balance personal, home life and work commitments (e.g. through family and carer-friendly policies).

If staff believe they have been subject to discrimination in employment, there are a range of steps they can take depending on the nature of the problem. These include trying to resolve the matter with the person concerned in the first instance, raising it with the line manager or HR, or using the grievance or whistle-blowing procedures.

Staff of the service also have a responsibility to treat others with dignity and respect. If staff are found to have acted in a discriminatory manner we will take action appropriate to the nature of the problem, including where necessary the disciplinary procedure.

5.4 Volunteers

Volunteers contribute significantly to the diversity of the service. They can expect to be treated fairly, with dignity and respect, and without discrimination. They are likewise expected to treat others fairly, with dignity and respect, and without discrimination. Due to the restrictions imposed by employment law, volunteers are not entitled to the same rights and protections as employees.

5.5 Other aspects of good practice

Race and disability equality schemes

The Race Relations (Amendment) Act 2000 and Disability Discrimination Act (2005) lay a positive duty to promote race and disability equality on all public bodies. Each body is required to identify its priorities for race and disability equality and take steps to deliver tangible improvements. This is normally set out in an equality scheme. It is likely that new legislation will place a similar duty on public bodies in respect of gender.

Citizens Advice service consists of independent charities, not public bodies. It is not bound by any duties placed on public bodies. Because of its values and its role in persuading public bodies to fulfil their duties, the Citizens Advice service has committed to working within the spirit of any duties to promote equality placed on public bodies and will therefore produce and monitor a race and disability equality scheme as part of this equality and diversity strategy.

Welsh Language Scheme

The Welsh Language Act requires public bodies to adopt and implement Welsh language schemes. Again, we are committed to best practice and the Citizens Advice Welsh Language Scheme was adopted in 1999 and remains current.

6

Putting the FAIR equality and diversity strategy into practice

6.1 Who is responsible?

Bureaux

It will be the responsibility of every bureau to implement the FAIR strategy in the light of their local circumstances. Citizens Advice will provide leadership and support for bureaux.

The regional and Wales equality forums will work with the regional and Wales committees to champion the strategy with bureaux and to progress the strategy at regional and Wales levels.

Citizens Advice

At Citizens Advice, the Chief Executive is responsible for the overall leadership and delivery of the equality and diversity strategy within the national organisation.

Executive directors are responsible for leadership and ensuring resourcing and implementation of the strategy. This applies to both their division and the strategic plan objective they lead on.

Service-wide and Governance

The Trustee Board has ultimate responsibility for the strategy. It is advised by the Citizens Advice Equal Opportunities Committee (EOC), which is responsible for the oversight and monitoring of the development and implementation of the strategy.

EOC members from the four Self-Organised Network Groups (SONGs) are responsible for communicating about the strategy with their groups and inputting their groups' perspective. The work of the SONGs contributes to the delivery of the strategy.

6.2 Delivery mechanism

In order to deliver the strategy, we have developed an overarching equality scheme with a set of common outcomes, and corresponding equality business plans for the main equality areas. The equality scheme follows the model of the Commission for Racial Equality's race equality scheme (which is a detailed action plan public bodies are required to have, to promote race equality). See section seven for more information.

The equality scheme and business plans link into the five objectives in the Citizens Advice corporate strategic plan, and set out what we want to achieve, what we will do to get there, and how we will measure progress and results.

The set of business plans will be developed as follows:

- ▶ a three-year race, religion and disability equality business plan starting in 2004/05
- ▶ a three-year gender and sexual orientation equality business plan starting in 2005/06, and
- ▶ a three-year age equality business plan starting in 2006/07.

They will set out what Citizens Advice will do and what bureaux can do, both to fulfil legal requirements and to meet best practice standards.

The timetable for the equality business plans gives structure and focus for our efforts nationally and locally. There is no hierarchy between the equality areas. The timetable is not intended to delay work that is already happening in an equality area that is scheduled for later years, or to stop work that is already happening across all equality areas. Depending on local circumstances bureaux may work in a different order on the issues. However the Trustee Board has a clear expectation that all equality areas will have been covered by Citizens Advice and bureaux between now and 2008.

Section 6 – Putting the FAIR strategy into practice

6.3 Outcomes and measures

The CRE recommends that race equality schemes focus on seven key outcomes, organised in three groups:

- ▶ key service outcomes
- ▶ key workforce outcomes
- ▶ measurable achievements in (race) equality and no significant disparity in public confidence levels.

We have translated these outcomes into the context of Citizens Advice and our corporate strategy 2004 – 2008, and as already mentioned have developed an all-area equality scheme with common outcomes that fit with each of the five strategic plan objectives. In response to suggestions from bureaux, we have reshaped the outcomes into a more positive and motivating format than in the draft strategy.

The draft strategy suggested corresponding outcome measurement methods. These will be worked up in more detail, simplified and finalised by the Citizens Advice Finance and Planning Division once the baseline exercise is complete.

6.4 'Mainstreamed' or specific?

In making equality and diversity part of everything we do, we will take a dual-track approach to reaching our outcomes that uses both mainstreaming and specific approaches according to what need we are addressing.

Specific: Where there are skills, knowledge or service gaps we will use specific, targeted equality and diversity initiatives to get us up to speed, to make progress, test new approaches, or create the space for change.

Mainstreaming: We will always take into account if and how our work will affect different people and communities differently. This means that in a generic project or service we will seek to include the range of people who make up the communities we work with. In case of a specific project or service where we are working with a defined community (eg refugees) we will take into account the diversity within that community.

Generic services example of mainstreaming

It can often seem that services described as generic are targeted on the needs of white, straight, non-disabled people. In fact a service such as a generic money advice project includes women and men, people from different faiths, older, younger, disabled, nondisabled people, BME, white, straight and LGB people. We take into account which of these people are likely to face additional barriers to inclusion, and whose economic problems are likely to be compounded by other factors. We recognise that many people are part of more than one of these groups and face multiple disadvantage.

Targeted services example of mainstreaming

A money advice project for older people will obviously not include younger people, but it will take into account the diversity of older people and their potentially different unmet needs and contributions. For example, older people who are men, women, BME, white, LGBT, straight, disabled, and nondisabled; those who speak English and those who don't; from different economic or educational backgrounds. It will not always be able to provide for all needs, but in the planning and evaluation stages it will actively consider and address equality and diversity issues and make conscious decisions and priorities.

6.5 Targets

As mentioned elsewhere, appropriate targets will be developed once the baseline exercise is complete, and the scheme will be revised accordingly.

6.6 Monitoring progress

Within Citizens Advice, the Finance Planning and Performance division is responsible for monitoring progress against outcomes and targets, within the annual business planning, CASE reporting and Bureau Information Survey processes. A programme of six monthly and/or annual reports to the EOC is being developed, linked to the findings of the benchmark exercise. From these reports the impact of the strategy will be evaluated and adjustments made.

6.7 Reviewing the strategy

In the fourth year of the strategy, the Equality and Diversity Manager, Equal Opportunities Committee and executive board will review the equality and diversity strategy, and introduce a revised strategy for the following four years.

FAIR equality scheme and outcomes

We have followed the well-established model of the CRE's race equality scheme, and have adapted it to provide an overarching equality scheme and outcomes that can be applied to all the main equality areas. The scheme applies to Citizens Advice and bureaux.

This section sets out the scheme, with its service-wide equality outcomes that cover all the main equality areas, i.e. race, religion, disability, sexual orientation, age, and gender.

Where we refer to disability in general, we include also mental health issues, and where we refer to race in general, we include also religion and nationality issues (i.e. immigration and asylum). We do so for the sake of brevity, recognising the inherent inaccuracy of this approach.

7.1 Process for developing outcomes and schemes

The CRE has a six-stage process for developing race equality schemes that we are following as a guide. The stages do not run exclusively one after the other – establishing and then finalising outcomes and priorities is a cyclical process linked to consultation. We have to:

1. Review our main activities and policies, considering how to:
 - ▶ eliminate unlawful discrimination
 - ▶ promote equal opportunities
 - ▶ encourage good relations between all communities.
2. Establish outcomes and priorities
3. Phase activities over the next three years, through our three equality schemes

4. Consult on a draft scheme

5. Publish the final scheme

6. Report on progress

7.2 Impact assessments

As part of the process of implementing a race equality scheme, many local authorities use a process called impact assessment to identify the extent to which an activity or policy may affect different communities differently or impact on good race relations.

To apply the technique of impact assessments to our own systems for strategic, business and project planning and risk management, we will ask and answer the following questions:

What do we need to do to make sure all the groups or communities we want to benefit will be able to do so?

For example, if we want to provide e-services to tackle the problem of people not being able to get advice, recognise that many lesbian, gay, bisexual and trans (LGBT) people may not feel comfortable coming to a bureau and are more likely to seek help anonymously – until we gain their confidence that if they seek advice directly they will not face homophobia. Make sure e-services specifically recognise these communities' existence and provide information relevant to their needs, and publicise the services in a way that clearly tells LGBT people that they are for them too.

What do we need to do to make sure that no one who should be able to benefit is directly or indirectly prevented from doing so?

For example, make sure that work-related social events are not always held on Friday evenings, which could exclude practising Jews or people with caring responsibilities.

Section 7 – FAIR equality scheme and outcomes

Will what we are planning have different impacts or consequences for different groups or communities? If so, how can we make sure that what we do promotes equality, and does not inadvertently undermine it?

For example, if starting a service for asylum seekers that will make their access to our services more equitable, but potentially reduce access for other people (who currently enjoy a monopoly on our services), carry out myth-busting about asylum seekers and communicate why it is important that we help them as well as others, to prevent as far as possible increasing resentment and hostility towards them.

7.3 Citizens Advice equality outcomes

The equality outcomes aim to make the service Fair, Accessible, Inclusive and Relevant to all the communities we have a responsibility to as a publicly-funded service provider, employer and volunteer organisation that is open to all.

It is important to note that being FAIR is about assessing and responding to needs, equity, and power balances. It's about making the best of opportunities for impact and change. It's about decision-making based on as rounded a picture as possible, that is as objective as possible. Being FAIR is about levelling up, not levelling down. It is not about crude numbers or percentages taken in isolation.

For example a bureau considering its services and how to make them available on a fair basis to all the different groups in their community will take into account:

- ▶ communities' unmet advice and social policy needs
- ▶ the extent of historic and current discrimination and exclusion the communities face
- ▶ relevant external factors including strategic agendas, legislation and funding
- ▶ relevant internal factors such as bureau staffing and resourcing.

7.3.1 Who do the outcomes apply to?

Equality and diversity matter to us all, so the equality outcomes apply to the six commonly recognised equality areas and social exclusion, i.e. they seek to provide fairness and equality on the basis of:

- ▶ race – equality between black and minority ethnic and white people
- ▶ disability – equality between disabled and non-disabled people
- ▶ sexual orientation – equality between lesbian, gay, bisexual and straight people
- ▶ gender – equality between women and men, including trans women and men
- ▶ age – equality between people of all ages
- ▶ religion – equality between people of all religions/beliefs and none
- ▶ social or economic status
- ▶ people who face multiple disadvantage.

7.3.2 Key service outcomes

Key outcomes for strategic objective 1: meet the needs of as many people as possible and ensure we reach those in greatest need.

We will provide inclusive, quality services, and achieve fairness/equality in:

- ▶ access to advice and non-advice services
- ▶ availability and targeting of services, including discrimination advice
- ▶ service user satisfaction levels.

Section 7 – FAIR equality scheme and outcomes

Measures:

- ▶ Bureaux and Citizens Advice: Demographic client data reported to regional managers (until 2006) and then on CASE (computerised casework recording system).
- ▶ Bureaux and Citizens Advice: Monitoring of clients by (self-identified) ethnicity and disability becomes requirement of revised membership scheme for bureaux being rolled out 2005/06.
- ▶ Bureaux and Citizens Advice: numbers and types of discrimination enquiries, casework and representation, recorded on CASE.
- ▶ Bureaux and Citizens Advice: data in annual Bureau Information Survey relating to access, language provision, number of specific services, and promotion of services to communities.
- ▶ Bureaux and Citizens Advice: MORI report 2004 provides national baseline of white/BME service user satisfaction levels.
- ▶ Bureaux and Citizens Advice: Need to develop national baseline of disabled and non-disabled, faith, gender, age and LGB service user satisfaction levels.
- ▶ Bureaux and Citizens Advice: demographic analysis of client satisfaction surveys and complaints, to be developed.

Key outcomes for strategic objective 2: have a greater influence on policy

We will 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.

Measures:

- ▶ Bureaux and Citizens Advice: Amount, analysis and use of discrimination and other relevant social policy data (bureau evidence forms and CASE) sent by bureaux to Citizens Advice.
- ▶ Bureaux and Citizens Advice: number of bureaux and type of activity in national and local social policy work/campaigns.
- ▶ Bureaux and Citizens Advice: stakeholder perception.

Key outcomes for strategic objective 3: innovate and develop new services

We will develop inclusive new services or develop existing services, and achieve equality/fairness in:

- ▶ use of new and developmental services
- ▶ service user satisfaction levels.

Measures:

- ▶ Bureaux and Citizens Advice: Demographic data for advice services collated from regional reports until 2006, then on CASE.
- ▶ Bureaux and Citizens Advice: Monitoring of advice clients by (self-identified) ethnicity and disability becomes requirement of revised membership scheme for bureaux being rolled out 2005/06.
- ▶ Bureaux and Citizens Advice: Capture and collation of non-advice service demographic data.
- ▶ Bureaux and Citizens Advice: Closer fit between the profile of local community needs and service users needs.

Section 7 – FAIR equality scheme and outcomes

Key outcomes for strategic objective 4: improve funding

We will seek and allocate resources equally and fairly in:

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

Measures:

- ▶ Bureaux and Citizens Advice: identification and prioritisation of new and existing funding streams that support equal opportunities and enable inclusion.
- ▶ Bureaux and Citizens Advice: analysis of budgets and extent to which 'full cost recovery' includes costs of fairness, accessibility, inclusion and relevance.
- ▶ Bureaux and Citizens Advice: analysis of funding decisions.
- ▶ Bureaux: measures to be developed.

7.3.3 Key workforce outcomes

Key outcomes for strategic objective 5: develop all our people (paid staff, trustees and other volunteers)

We will be an inclusive, best practice employer, and achieve 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.

Measures:

- ▶ Bureaux and Citizens Advice: Demographic monitoring of staff, updated every six months.
- ▶ Bureaux and Citizens Advice: demographic monitoring of staff, volunteers and trustees (partially done within annual Bureau Information Survey).
- ▶ Bureaux and Citizens Advice: develop demographic monitoring of all key stages of employment cycle, including policies and procedures.
- ▶ Bureaux and Citizens Advice: develop staff/volunteer satisfaction survey.

7.3.4 Measurable achievements in equality and no significant disparity in public confidence levels.

If we make progress on the above outcomes, we will make measurable achievements in ensuring equality and no significant disparity in public confidence levels, i.e:

- ▶ people of all communities in England and Wales will know they can rely on the Citizens Advice service for high quality advice that is accessible, inclusive, and responsive to their needs
- ▶ all our work will be relevant to and valued by all parts of the community, including people who experience discrimination and exclusion.



Equality business plans to achieve these outcomes

We know we can't do everything at once, so we will have three phased business plans, to show what we will actually do and how it will be resourced, as follows:

- ▶ a three-year race, religion and disability equality business plan starting in 2004/05
- ▶ a three-year gender and sexual orientation equality business plan starting in 2005/06, and
- ▶ a three-year age equality business plan starting in 2006/07.

For Citizens Advice, each of the three-year equality business plans will be developed in turn as part of the corporate strategic plan 2004/08, and each year's individual activities will be transferred into the annual business plan. All equality and diversity work will be clearly marked and identifiable within the corporate strategic plan 2004/08 and annual business plans.

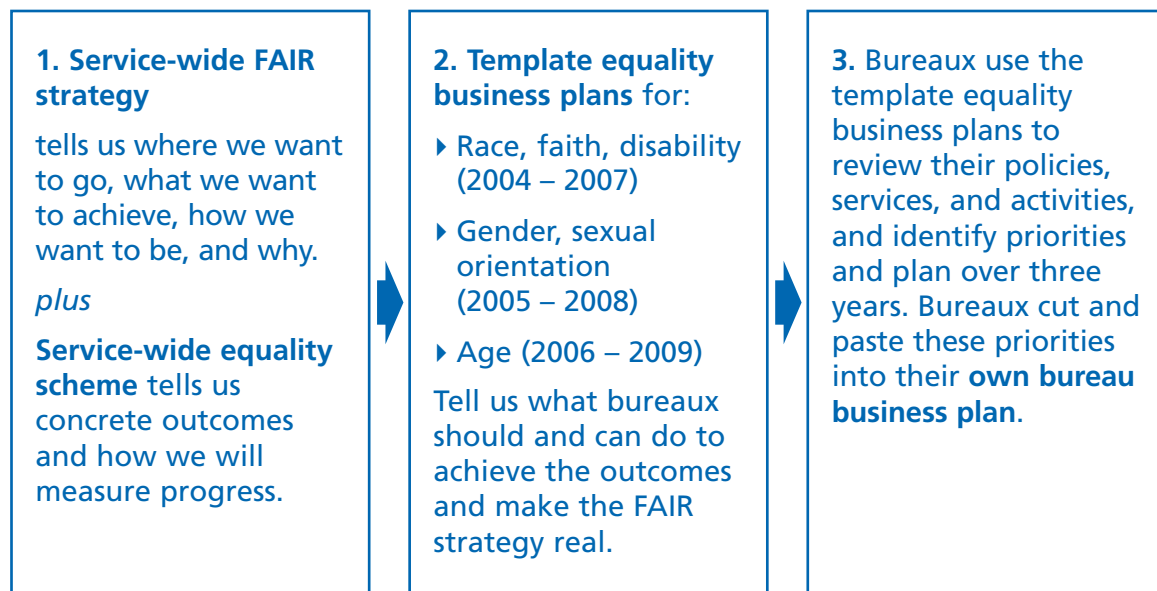
For bureaux, a template race, faith and disability equality business plan is available now as a separate document. It is based on the results of the consultation on the indicative race and disability equality business plan. It lists all the activities and policies that are key to pursuing our equality outcomes from a race, faith and disability perspective. Bureaux can use it as a tool to identify and plan their priorities and next steps based on their own circumstances (rather than doing everything listed in the plan). It is organised according to the five strategic objectives and can be adapted (or cut and pasted) to fit directly into bureaux own business plans.

Template gender and sexual orientation and age equality business plans for bureaux will be made available in due course.

A picture of how it all fits together

We aim to become a first point of contact for discrimination advice in partnership with others, and to make equality and diversity part of everything we do. This is so that people of all communities in England and Wales will know they can rely on the Citizens Advice service for high quality advice that is accessible, inclusive, and responsive to their needs; and so that all our work is relevant to and valued by all parts of the community, including people who experience discrimination and exclusion.

Bureaux



Section 9 – A picture of how it all fits together

Citizens Advice



Let us know what you think and stay up-to-date

For Citizens Advice staff and bureaux

We hope you find the FAIR strategy both thought-provoking and practical. Please take a couple of minutes to give us some feedback.

1. Your name, division or bureau, and contact number or email

.....
.....

2. What do you find most useful about the strategy?

.....
.....

3. What do you find least useful?

.....
.....

4. Is there anything that isn't clear or that you would like further information about?

.....
.....

Join the FAIRexchange

This document is just a small part of what's going on in the service to put the FAIR strategy into practice. Whether you work for a bureau or Citizens Advice, one of the best ways to keep up-to-date with equality and diversity developments is to join the FAIRexchange. You can use it to share your news too. It's easy: sign up once on Cablink and you'll receive the FAIRexchange e-bulletin straight into your inbox every month.

Let us know what you think and stay up-to-date

Just for bureaux

1. Do you have a lead person responsible for equality and diversity issues?
If yes, please tell us:

Lead contact name:

Bureau:

Address:

Phone:

Email (if applicable):

2. Have you discussed the FAIR strategy at your trustee board?

Yes No Planned

3. Have you received and displayed "Is part of who you are part of why you're here?" – the new poster for interview rooms about unfair treatment and discrimination?

Yes No

(If no, you can contact Citizens Advice Customer Services to get some)

Please cut out and return this page to:

Ali Harris, Programme Manager Equality and Diversity, Citizens Advice,
Myddelton House, 115-123 Pentonville Rd, London N1 9LZ.

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