



# FAIR Annual Report 2010/11

Activities of the Equal Opportunities Committee,  
Progress against E & D Action plan & KPIs

04 July 2011

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## Introduction

This has been an eventful year, both in the life of the committee and in the field of equality.

Firstly, the implementation of the Equality Act 2010 which saw the greatest change in equality legislation for a generation. The consolidation and streamlining of equality law brought about by the Act forms a considerable part of the work detailed in this report. From the publicity about the new provisions to ensure that the people we serve are aware of their rights, through to the review and updating of information and policies, you will see that a tremendous amount of has been achieved. Alongside this we continued to see year on year increases in the number of discrimination enquiries bureaux advised on.

Secondly, the review of the Equal Opportunity Committee, which has resulted in a new membership structure, strengthened terms of reference (see Appendix 1) and a new name - Equality Committee - was an important part of the Committee's work over the past year. The outcome will be to provide a sharper focus to the work of the committee and its role in providing leadership on equality, diversity and human rights for the Citizens Advice Service.

Other achievements include the successful new mentoring scheme for staff from Black, Asian and Minority Ethnic backgrounds. Also, Citizens Advice was awarded best performing charity in the Stonewall Workplace Equality Index, ranking 21 in the Top 100 employers. Our National Lesbian, Gay and Bisexual Group was one of 47 employee network groups accorded Star Performer Status.

As well as the work of the Committee, this report shows how the Citizens Advice service is responding to the targets it sets itself on discrimination advice and diversity of clients, staff and volunteers. The report also shows the breath of equality related work and the progress made across the organisation as part of the Corporate Equality Action Plan.

The report covers:

- The work of the Equal Opportunities Committee (EOC) which is a subcommittee of the Citizens Advice Trustee board
- Progress against equality and diversity Key Performance Indicators (KPIs)
- Progress on the Citizens Advice 2010/11 corporate equality action plan, which is drawn from the corporate business plan. Due to capacity limitations, information in this section is lifted directly from departmental business reports without commentary or analysis.

## Equal Opportunity Committee Membership

During the year April 2010 – March 2011, the membership of the committee was: -

John Gladwin	Chair
Annie Hedge	Trustee Board Representative
Salli Edwards	Representative, National Lesbian Gay Bisexual Group (NLGB)
Carl Allen	Representative, National Black Workers Group (BWG)
Lynne Baird / Anna Robottom	Representative, National Women's Group (NWG)
Clive Bassant	Representative, Disabled Workers Group (DWG)
Stuart McKenna	Elected Member (membership lapsed due to non-attendance)
Craig Lane	Elected Member Newport CAB (EOC representative on the Trustee Board)

# 1. The Work of the Equal Opportunities Committee (EOC)

## Role and Structure

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The EOC is a sub committee of the Trustees Board. It is chaired by John Gladwin, who is also the chair of Citizens Advice, and draws its membership from Bureaux, the national Trustee Board and the Self Organised Network Groups (SONGs), namely the National Black Workers Group, Lesbian, Gay and Bisexual Group, Women's Group and the Disabled Workers Group.

The EOC's role of guiding, advising and overseeing the service's work on equality underwent a review during the year and this resulted in a change of name to Equality Committee and new terms of reference which were approved by Citizens Advice Trustee Board on the 27<sup>th</sup> October 2010. The new terms of reference are shown in full at Appendix 1.

The committee met 3 times during the year and the main topics dealt with are shown below: -

### 16 June 2010 Meeting

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- **Governance Review: consultation findings** - Provided feedback on financial independence required by trustees, which could impact on diversity of those appointed and the inclusion of knowledge/experience of working on equality and diversity as a skill required by board members.
- **CRM (Client Relationship Manager) Replacement for CASE:** Making representations to ensure that equality and diversity considerations are built in to the new system.
- **Adviceline Cymru:** Rejected a proposed report which said that language provision was not required because speakers of other languages always preferred face to face services.
- **EOC Terms of Reference:** Made recommendation to the Trustee Board regarding the balance between monitoring/scrutiny role and forum to generate ideas.
- **HR Update:** Head of HR updated the committee on EIAs, staff surveys, Stonewall Workplace Equality index and an equality audit to be carried out.
- **Reports from SONGs:** Included proposed NLGBG survey of membership which could be added to Citizens Advice Staff Survey

### 24 November 2010 Meeting

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- **CRM replacement for CASE:** Accessibility of the new system, screen readers and the training to use them were discussed. Also emphasis of inclusion of reporting categories, such as sexual orientation and nationality (eg Welsh) as essential.

- **Head of Human Resources Update:** Introduction of Report and Action Plan from the Diversity Audit of Recruitment and Selection, Progression and Development and discussion of the follow up to it.
- **Citizens Advice Business Planning:** Setting the context for the forthcoming year's business planning and discussion of the format.
- **Greatest Need Survey:** Update on the survey of Bureaux covering human rights, community cohesion, hate incidents and gender violence and discussion of the uses to which the data gathered can be put.
- **Reports from SONGs:** Women's Group attended End Violence Against Women event.

## 28 February 2011 Meeting

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- **Information and Communication Technology:** Further discussion of the accessible ICT solutions and standards and ways in which communication could be improved.
- **Update from the Chief Executive of Citizens Advice:** Covered the 2 main areas of a) taking over consumer functions from Consumer Direct and Consumer Focus and b) the establishment of the hubs model across the network.
- **Quarter 3 Equality and Diversity Report:** A review of equality and diversity work across the organisation, outside the Equality and Diversity team.
- **Equality and Diversity team – Draft Business Plan:** discussion of 4 main priority areas of embedding E & D in key areas of organisational and network change, increasing the quality of advice and policy work, and providing consultancy and support for delivering the organisations E & D Strategy.
- **Reports from SONGs:** Report of the National Black Workers Group Learning Event and AGM which raised issues of racism in the service and a more rounded approach to managing racism by all stakeholders.

## 2. Key Performance Indicators and Equality

Key Performance Indicators were set to measure the extent to which the objectives of Equality Strategy have been met and to see whether progress towards those objectives is being achieved.

In relation to the provision of advice, we exceeded the target for BAME clients. On discrimination advice the indicators show a welcome 25% increase, and while this is short of the overall target, it is still a significant achievement given the economic climate which resulted in less funding than anticipated.

In relation to workforce and volunteer diversity, while we have not achieved the hoped for step-change, the service's performance continues to benchmark well against the voluntary sector.

In Citizens Advice, the % of disabled staff in Citizens Advice has risen steadily, 2% of line managers are disabled, but we still have no disabled senior managers. The number of BAME senior managers remained constant, 9% of line managers are BAME, and the % of BAME staff fluctuated between 9% and 11%. Citizens Advice introduced sexual orientation monitoring, which showed 6% of staff identified as Lesbian, Gay or Bisexual (increasing to 9% at senior management level); 71% as straight; 20% no data; 3% prefer not to say.

In bureaux, we exceeded the target for BAME volunteers, but fell far short of the other ambitious targets where there were 1-2% increases or 1-2% decreases. Overall, the picture shows that a step-change will not happen without significantly more activity to drive it.

Indicator	Target by 2011	2009/10	2010/11
Number of discrimination inquiries (all equality strands) pa	40,000 or 70% increase	28,000 or 22% total increase	28,500 or 25% total increase
% BAME clients	14%	15%	15%
% of disabled clients	No target	23%	23%
Citizens Advice number and % BAME staff	9% and see note <sup>1</sup>	48 people 10.6%	46 people 9%

<sup>1</sup> In 2010/11 the target for the % of BAME staff in Citizens Advice was revised up from 9% to 15% by the end of 2014. At the same time, targets were introduced for Citizens Advice staff as follows: BAME senior managers 15%; Disabled staff 14%; Disabled senior managers 14%

Indicator	Target by 2011	2009/10	2010/11
Citizens Advice % of BAME senior management/directors	See footnote 1 above	2 people 4.3%	2 people 7% <sup>2</sup>
Citizens Advice % disabled staff	See footnote 1 above	19 people 4%	23 people 6%
Citizens Advice % of disabled senior management/directors	See footnote 1 above	0 people 0%	0 people 0%
Bureaux % of BAME volunteers	10%	11%	11%
Bureaux % of BAME managers	10%	6.6% (up 1% from 07/08)	5%
Bureaux % of BAME trustees	10%	6% (up less than 1% from 07/08)	7%
Bureaux % of disabled volunteers	14%	7.3% (down from 9.1% in 07/08)	7%
Bureaux % of disabled managers	14%	5.3% (same as 07/08)	5%
Bureaux % of disabled trustees	14%	7.1% (down 1% from 07/08)	7%

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<sup>2</sup> The % of BAME senior managers has increased although the number is the same, because the overall number of senior managers reduced.

### 3. Progress on Citizens Advice 2010/11 Equality Action Plan

The performance of Divisions and Departments in working towards the Equality Action Plan was assessed against the 3 priorities set out in the FAIR Strategy, which were: -

- To increase the availability and quality of discrimination advice and policy work.
- To diversify our trustee boards and management and increase their knowledge of equality, diversity and human rights issues.
- To develop a common understanding of greatest need and ensure this informs service and policy planning and delivery.

#### 3.1 Equality and Diversity Team – Chief Executive’s Office

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##### Raising awareness of the Equality Act 2010

Work was undertaken across the service to ensure all relevant resources, policies etc were updated to reflect the changes introduced by the Equality Act 2010. Activities undertaken included: -

- Cross divisional work with colleagues in HR, Press and Public Affairs, Membership Services Division, Adviceguide and Advisernet teams to ensure all relevant information was updated and that teams were aware of the new legislation.
- A project funded by the Government Equalities Office was developed and managed delivering the following: -
  - 3 factsheets on the Equality Act 2010 aimed at the public,
  - media packs (with case studies) for bureaux,
  - a British Sign Language (BSL) video for Deaf people outlining the provisions of the Act,
  - a training course for Advice Session Supervisors (ASSs) entitled Helping Advisers Identify Discrimination Issues (HAIDI) incorporated the Equality Act 2010 and ran at 11 locations around the country to 146 ASSs. Because of the demand a further 10 courses were arranged before the end of March 2011.
- The team also worked with Specialist Support and Membership Services to assist in the planning and delivery of conferences in Manchester, Shrewsbury, Taunton and London for bureaux covering the use of the public sector equality duty introduced by the Equality Act 2010.

## **Working Together for Advice project - Discrimination Workstream**

This project was delivered over a 3 year period ending in December 2010 by a partnership of 6 advice networks. The discrimination workstream developed and piloted training courses and materials in non-employment discrimination advice for information, generalist advice and specialist advice levels; piloted 6 local referral networks and an innovative mentoring scheme; and provided 9 regional networking and capacity-building conferences for discrimination caseworkers.

The independent evaluation of the discrimination workstream found it had produced excellent products and services which received high praise from internal and external stakeholders. Feedback on the discrimination training was 'overwhelmingly positive'.

### **Policy work**

The following work was undertaken during the year: -

- A response was prepared and submitted to GEO's consultation on Violence Against Women and Girls.
- A submission was made to EHRC's formal inquiry into disability-related harassment.
- A contribution was made to the Spending Review submissions to government departments.
- An additional Spending Review document was prepared and submitted to the GEO.
- We contributed to the GEO consultation process about the specific duties which should be required of public authorities as part of their public sector equality duty.
- Input was made into an additional round of GEO consultation on specific equality duties, the Government's Red Tape Challenge and the Budget.

### **Regular internal co-ordination meetings**

Cross divisional meetings on discrimination and greatest need have been held during the year. Information about the wide range of work taking place across the organisation is made available to all attendees who are then able to contribute to the discussion and planning of future work. A planned working group focusing on discrimination has not yet met due to competing priorities but it is still intended that this be instituted. The cross divisional meetings have been instrumental in the development of a paper outlining equality priorities over a 12 month period for the Executive Team.

### **External relations and profile building**

The activities that have taken place under this heading have included the following: -

- A meeting was arranged where Gillian Guy, who had then newly taken up post, was able to meet with the Chief Executive and other directors of the Equality and Human Rights Commission (EHRC).

- There has been on going liaison with the EHRC over their non-payment of grants to bureaux.
- A partnership approach has been adopted with the EHRC Transfer of Expertise Team with a view to delivering training beyond the end of the Working Together for Advice, a project to develop the quality and quantity of discrimination advice, which ended in 2010.
- Participation in Government Equalities Office's review of the EHRC Helpline.
- Regular attendance and contribution to Equality and Diversity Forum (EDF) which has included the delivery of workshops at their annual conference on the subject of the Equality Act 2010 and the use of public sector equality duties prior to the enactment of the single duty brought in by the Act.
- Involvement with EDF has included the development of a joint project to look at ways increasing the diversity of volunteers which will assist out own 'Improving Diversity' project aimed at increasing the diversity of bureau trustees and volunteers generally.

### **Impact of General Election result on FAIR strategy**

Work on this consisted of : -

- Commissioning and disseminating a report on Conservative party approaches to Equality
- Monitoring the Coalition's implementation of Equality Act 2010 and disseminating their subsequent 'Equality Strategy'.

### **EU Progress Project**

This partnership project delivered public legal education on equality and discrimination rights with support from EU funding and the Strategic Services Division. Activities as part of the project management group developing the application process for local Public Legal Education (PLE) projects; reviewing PLE publications and materials including a guide and a magazine for the public; a 'how to' guide for organisations and an evaluation guide.

Activities involving bureaux included the following:

- Birmingham CAB produced a DVD to highlight discrimination in employment and what could be done about it.
- Exeter CAB carried out workshops with migrant workers with a specific focus on non-discrimination in employment and service provision, including housing.
- Southend CAB ran a mixture of workshops and stalls at community events to raise awareness of discrimination and human rights.
- Village CAB ran a programme of 10 public legal education sessions in the North West designed to improve levels of awareness of discrimination in LGB communities.

The project was completed successfully and discussions have been held with partners about bidding for the next round of funding.

## **Report on Hate Crime, Domestic Violence and Community Cohesion: the development of Bureaux services**

The Greatest Need survey, which formed the basis of this report, received the responses of 108 bureaux – an excellent response rate.

The resulting report has been discussed at the cross divisional meeting on discrimination and greatest need and at the Equality Opportunity Committee, which resulted in the inclusion of recommendations about strategic partnerships.

The report has been widely disseminated via CABlink and the Mid Month Pack, a copy of which goes to every bureau.

The findings of the report have also been used as the basis of a funding application to the Ministry of Justice. The original survey will also be used to form the basis of a longitudinal study so as to build on the 27% response rate and respond to emerging trends.

### **Information and Good Practice Guidance**

Good practice guidance is being developed on hate crime and domestic violence and will use the examples the examples of good practice which emerged from the Greatest Need survey.

Hate crime information is now on Adviceguide including podcasts, written information and bi-lingual hate crime leaflets.

BMIS guidance has been produced on community cohesion and on using human rights in bureaux.

The Greatest Need survey report gave numerous examples of guidance and good practice in community cohesion, hate crime, gender violence and bureaux using a human rights approach.

### **Coordination of fundraising activity**

The main areas fundraising activities were as follows: -

- A successful bid was made to the Government Equalities Office (GEO) for awareness raising activities related to the implementation of the Equality Act 2010.
- A project and bid to Big Lottery Fund (BLF) aimed at improving access to advice for Deaf clients has been developed.
- A equality and diversity element was developed for inclusion in the bid to Business Innovation Skills for the Consumer transformation programme
- An unsuccessful bid, with external partners, was developed and submitted to EU.

## **Work with Strategic Development Division**

A new equality co-ordinating group in ADS comprising Specialist Support, Information and Learning and Development has been established to which we will contribute. We will seek to influence the development of adviser competencies to ensure that all bureaux roles include discrimination and greatest need.

## **Work with National Partnership Development team**

This consisted of ensuring that the Spending Review and white paper submissions to the Department of Health covered advice on greatest need issues including gender violence, discrimination and hate.

Opportunities were explored with the Mental Health cross-divisional group to find funding for greatest need awareness training.

Information is now on BMIS in respect of Mental Health issues and how bureaux should respond to it.

We contributed equality considerations in National Partnership Development's response to the public health White Paper by identifying the key health equality priorities as highlighted in several reports: the Marmot Report, the National Equality Panel Report and the EHRC Triennial Review.

## **Developing national partnerships and seeking funding**

Identification of potential partners has begun on the topics of hate crime and gender violence as well as the development of relationships.

A partnership project with bureaux is being developed on BSL advice with an external partnership with the Royal Association for Deaf people (RAD). Partner meetings and focus groups have been held as part of development of this project and the associated funding bid.

## **Communications and other engagement**

Communications and marketing work has included: -

- The For Me For You For Everyone campaign on the Equality Act 2010 which included 'give-aways', and a new CABlink section.
- New hate crime leaflets and posters for bureaux have been designed and produced.
- We have contributed to the corporate communication plan.

## **Support for Self Organised Network Groups (SONGs)**

A volunteer was engaged to review their work and a resulting report considered at SONGs meeting in September 2010. the review has led to the following : -

- In depth work and analysis on identity politics linked to how SONGs operation. An 'identity framework' has been developed to assist SONGS to extend their network

and support functions to people with multiple identities and other 'protected characteristics'

- A new commissioning model has been proposed to strengthen the position of SONGs and improve transparency and accountability. The model provides guidance on core functions, expenses policy and recommendations for service delivery.
- An additional protocol for SONGs support for volunteers has been developed in partnership with the SONGs and the volunteer team.

### **Contribution to Citizens Advice AGM**

Two meetings were organised for the AGM in York - a 'Theme meeting' on Hate Crime and Domestic Violence and 'Strategy meeting' on the Equality Act 2010

### **Co-ordination and Consultancy**

Activity under this heading includes: -

- Producing the Annual Report for 2009/10.
- Completing the review of the EOC (to be known in future as the Equality Committee) including new terms of reference (see Appendix 1), and a new membership structure including facilitating the recruitment of external members with specific expertise in equality and diversity.
- Supporting the business planning process by developing and circulating the FAIR business Planning Tool and undertaking extensive meetings with teams and departments to enable them to develop FAIR related objectives.
- Supporting Human Resource and Performance and Planning teams to update the equality and diversity KPIs.
- Providing supporting and guidance to Corporate Management Information Team on client ethnicity monitoring and disability reporting guidance.
- Assisting the Communications and Press teams on the development of Advice Week activities
- Providing guidance to the Public Affairs team to ensure that a guidance booklet for MPs was legally accurate.
- Providing advice to Financial Inclusion Fund (FIF) on a disability and debt DVD.
- Undertaking an Equality Impact Assessment of the savings programme
- Providing consultancy to Membership Services Division on targets for their Improving Diversity programme

- Assisting HR in their Equality Impact Assessment of the Organisation Change Policy.

## 3.2 Membership Services

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### Increasing diversity project

This project focussed on working with bureaux to develop skills and diversity audits to improve the recruitment of more diverse trustees. The main focus has been on disability issues and developing partnerships to widen the pool of potential volunteers, trustees and managers from a more diverse background.

A theme meeting has been delivered twice entitled "Reflecting our Communities Better" which directly linked into the work of the project. A presentation and discussion was also held at the Trustees Breakfast at Citizens Advice Annual Conference which looked at the project and its work.

A similar session was held on the Code of Governance for trustees where the importance of equality and diversity and improving trustee diversity was highlighted.

Two smaller projects have been undertaken: -

- A skills/diversity audit - encouraging Trustee Boards to be proactive in how they recruit trustees to ensure diversity
- Encouraging bureaux to take the Positive About Disability (2 Ticks) to promote the recruitment of disabled people and promote a disability friendly workplace.

The guidance and tools associated with these two projects have been made available on the Bureaux Management Information service (BMIS) website for use by any bureaux. Six bureaux indicated they want to get involved in the Positive about Disability and were given detailed support.

In relation to trustee diversity, contact was made with the Equality and Diversity Forum and Network of Black Professionals in order to develop partnerships initiatives which will help increase the diversity of our trustees & managers.

### Developing best equality and diversity practice in bureaux

The equality and diversity section of BMIS has been completely overhauled to incorporate the changes brought about by the Equality Act 2010. Bureaux managers and trustees now have access to an excellent resource to update them on the new law and the changes that have taken place.

Other work undertaken on BMIS includes: -

- The update of the mental health documents which appear in the equality and diversity section.
- Good practice guidance on governance updated in line with the activities of the Improving Diversity project.
- Information and good practice guidance on the new public sector equality duty, based on materials developed for conferences and workshops.

### **Areas and Wales equality and diversity groups**

Conferences on how the public sector equality duty can be used to challenge spending and service cuts have been delivered across the network in England and Wales. Events have been held in London, Taunton and Shrewsbury and were highly successful. A conference report was produced and was published on CABLink along with a PSED Toolkit.

### **Evaluating the impact of dedicated E & D leads**

The scheme which established Equality and Diversity Coordinators in the Central Area was evaluated and showed it was a successful initiative. Unfortunately a wider roll-out has not been possible due to a combination of factors including availability of resources and restructuring.

## **3.3 Consumer and Welfare Policy**

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### **Scope research on identifying and supporting clients in greatest need**

As part of this scoping exercise the link between debt and disability was identified as the basis for future research which will look at the extent to which disabled people were more likely to be in debt and faced barriers to achieving appropriate services from financial and credit agencies.

### **Disability Living Allowance (DLA) Reforms**

Extensive work has been undertaken to highlight concerns about the reforms of the DLA. The impact of the Personal Income Plan was highlighted, particularly the extension of qualifying periods and the halving of rates for children.

### **Civil Debt Recovery**

A report, **Uncivil Recovery**, was published focussing on the negative impact on vulnerable people of debt recovery practices. The majority of cases cited involved young people or people with mental health disabilities. Clients were supported to ignore inappropriate demands with confidence and Government has been engaged in debate on how to resolve the issue.

### **Universal Credit**

Work was undertaken to influence the implementation of the Universal Credit which has risks of a negative impact on disabled people as well as carers. This work has continued by seeking to influence the Welfare Reform Bill, again with particular emphasis on disabled people and those with childcare costs. This included writing briefings on the subject and proposing amendments which could be tabled by MPs.

## Legal Aid

A response was made to the Ministry of Justice's consultation on the proposals for the reform of the legal aid system which highlighted the dangers of the proposals, particularly for certain protected groups.

## 3.4 Human Resources

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A Diversity Audit was commissioned which produced a number of recommendations relating to recruitment and selection, identifying and acting on under representation. The most urgent recommendations were acted upon and others will be built in to the forthcoming Diversity Action Plan for 2011-13.

A concerted scheme of activities was developed around submitting Citizens Advice entry for the Stonewall Workplace Equality Index which produced an extremely creditable result – 21<sup>st</sup> in the top 100, the highest charity in the Index and a considerable improvement on the previous year's ranking.

A policy on Transsexual People in the Workplace was developed and consulted upon with a view to becoming operative in the near future.

Citizens Advice joined the Network of Black Professionals as a corporate member. The benefits include access to a broader, more diverse talent pool and opportunities to raise the profile of Citizens Advice to potential BAME employees, as well as access to individual support for employees.

A BAME staff pilot mentoring scheme was established to enhance the career development opportunities for BAME staff. The evaluation of the programme has shown it to be highly valued by participants and will be continued.

## 3.5 Social Policy and Campaigns

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Activities undertaken included the following: -

- Workshops with equality and diversity themes were organised as part of the Social Policy Conference and a speaker from the Government Equalities Office with a plenary. The conference was attended by delegates from bureaux.
- Discrimination reporting was encouraged in guidance materials, at training workshops and social policy groups
- Improved guidance developed on 'Political parties advocating discriminatory policies' and promoted to targeted bureaux in the run up to the general election.
- Encouraged discrimination reporting by bureaux by using Advice Week's focus on discrimination as a topic.
- The team helped to stage a series of regional events highlighting public sector equality duties.

### **3.6 Advice Development Support (ADS)**

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A major piece of work undertaken by the Information Team was the substantial rewrite of discrimination-related information on Adviceguide and AdviserNet as a consequence of the implementation of the Equality Act 2010.

Other related activity included: -

- Incorporating a BSL video on discrimination and the Equality Act 2010 on the Adviceguide website.
- The Adviser magazine published articles focusing on equality and discrimination issues
- The inclusion of hate crime podcasts on Adviceguide
- Supporting the rewriting of the Helping Advisers Identify Discrimination Issues course for Advice session Supervisors (HAIDI).

### **3.7 Public Direct**

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An Equality Impact Assessment undertaken in 2009/10 was used as the basis to equality assure Public Direct activities.

### **3.8 Corporate Management Information Team (CMIT)**

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Work on equality and diversity has involved providing support and expertise in the following areas: -

- Providing support to the E&D team in the design and development of Survey Monkey questionnaires
- Supporting the planning and monitoring of the equality and diversity strategy.
- Analysing of data and reporting on equality and diversity KPIs.
- Producing a performance report for the EC, including data to show progress against KPIs
- Working with the E&D team to include the equality element in the annual business planning process and strategic planning.

### **3.9 Financial Inclusion Fund**

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FIF caseworkers are based in Bureaux across England and Wales giving face-to-face, free and impartial debt advice. In ensuring equality of access to their service they have: -

- Provided access to Language Line, a telephone translation service, for those who need to communicate in a language other than English. The top 3 languages provided were Polish, Portuguese and Czech. Somali was the most frequently requested non-European language, with over 20 languages being provided overall.
- A disability project involving 17 caseworkers working with 4 agencies: Mencap, RNIB, Action on Hearing Loss and Contact a Family. The aim of the project is to

provide debt advice workers who are fully trained in assisting disabled people overcoming the barriers they face. The project: -

- helped 1,800 clients with over 5,000 debts
- provided 436 hours of British Sign Language (BSL) during advice sessions
- updated Advisernet with latest disability news and information
- made a DVD showing the financial difficulties disabled people face
- produced a desktop resource sent to all bureaux as an aid to caseworkers working with disabled clients.

### **3.10 Finance**

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Financial support has been provided to the SONGs including carrying out audits and providing advice.

### **3.11 Facilities**

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The prime responsibility is to ensure that all Citizens Advice premises have up to date Access Surveys and an action plan to implement recommendations. This has been maintained throughout the year. Similarly, all offices requiring them have induction loops fitted.

### **3.12 ICT**

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The main focus of activity was the development of Accessibility Guidelines which were completed and the testing process agreed for all computer based applications.

The forthcoming Client Relationship Management system, known as PETRA, successfully completed its accessibility testing.

### **3.13 Finance and Legal Services**

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Guidance notes on pensions and other practical policies developed for bureaux have been assessed to ensure that they comply with good equality practice and are consistent with the FAIR agenda

NACAB Pension Trust Deed and Rules have been updated to comply with changing legislation in relation to Civil Partnerships and Age.

Contracts developed have ensured equalities aspects are appropriately addressed and Stonewall recommended practice has been incorporated.

# Appendix 1

## Equality Committee Terms of Reference

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The role of the Equality Committee<sup>3</sup> (EC) is to:

- Provide leadership on equality, diversity and human rights to the Citizens Advice service
- Provide expertise and guidance to Citizens Advice staff and the Trustee Board to:
- ensure that promoting equality and tackling discrimination on behalf of clients is at the heart of the service's advice and policy work
- enable the service to innovate and be at the leading edge of equality, diversity and human rights in the advice sector
- enable the service to be an exemplar employer and volunteer agency in relation to equality and diversity.
- Take ownership of the service-wide equality strategy (or equivalent) and monitor progress on delivery and hold the service to account.
- Advise on the equality and diversity implications of the corporate business plan (or equivalent) and all major new initiatives, making recommendations to the Trustee Board; receive and scrutinise monitoring reports on all such plans.
- Work collaboratively with the Executive Team to ensure early input into the development of propositions and opportunities, so that equality, diversity and human rights are addressed at the outset and at key points in the work cycle.

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<sup>3</sup> The Equality Committee is the operating name of the Equal Opportunities Committee, a subcommittee of the Trustee Board required by the Citizens Advice memorandum and articles.

- Act as champions for equality, diversity and human rights across the service, hold a mirror to the service and challenge it to continuously improve.

### **The role of EC members is to:**

- Contribute expertise based on good practice and innovation within the service, externally, or both.
- Represent and promote the interests of the CAB service.
- Protect and promote the values and principles of the service, particularly its commitment to equality, diversity and human rights.
- Contribute fully to effective decision-making by the EC.
- Ensure the views of bureaux are collected and understood.
- Apply independent judgement to all issues talked about at the EC.
- Communicate, explain and support the decisions of the EC.

### **EC members must:**

- Have significant experience of implementing equality, diversity and /or human rights practice within the service, externally, or both.
- Understand and be committed to the aims, principles and equality and diversity policies of the Service.
- Understand, or be willing to develop an understanding of, the service.
- Be able to think strategically and prioritise.
- Be able and willing to act impartially and apolitically.
- Be able to challenge and question.
- Be able to represent and promote the policies and work of the service.
- Be available and ready to prepare for and attend EC meetings.
- Abide by the standards of behaviour set out in the Citizens Advice Code of Conduct for Trustees and Committee Members, sharing responsibility for decisions and acting in an individual capacity for the good of the service rather than as a representative of a group.

### **Membership of the EC is:**

- The chair of the Trustee Board and one other Trustee Board member appointed by the Trustee Board.
- The chair of the Trustee Board will be the chair of the EC.
- Four members appointed by the self-organised groups within the CAB service as follows:

The Black Workers' Group

The National Disabled Workers' Group

The National Lesbian, Gay and Bisexual Group

The National Women's Group.

- Five members selected through an open recruitment process
- The appointment and recruitment processes will include open consideration of achieving a gender balance and broader balance of diversity across the membership.
- Members are appointed for a term of up to three years, subject to a maximum of six years in total.
- Four members will constitute a quorum. No meeting will be quorate unless at least one Trustee is present.
- Non-attendance of any three consecutive meetings of the EC, without prior consent from the chair, will render membership null and void, unless the EC decides otherwise.
- The EC may invite others from within the service or externally to attend and contribute to meetings as appropriate to help specific discussions.

#### **Meeting arrangements and servicing:**

- Meetings will take place each quarter.
- Meetings will be serviced by the equality and diversity team.
- The minutes of each meeting will be submitted to the Trustee Board.
- The EC is authorised by the Trustee Board to investigate any activity within its terms of reference (but without duplicating the role of other existing governance bodies and processes). It is authorised to seek any information it requires from directors, as part of its governance role ensuring transparency and accountability.
- The EC will produce an annual report to the Trustee Board on its work.

Final version

Approved by Citizens Advice Trustee Board

27 October 2010

## Aims and principles

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

The service aims:

- to provide the advice people need for the problems they face
- to improve the policies and practices that affect people's lives.

### **Citizens Advice**

115-123 Pentonville Road  
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Telephone: 020 7833 2181

[www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)  
[www.adviceguide.org.uk](http://www.adviceguide.org.uk)

Citizens Advice is an operating name of The National Association of Citizens Advice Bureaux.  
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