

Fair Accessible Inclusive Relevant

The Citizens Advice Service equality and diversity strategy
2008 - 2011



The aims of the CAB service

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

Our 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.

Our values

To focus on customers, achieve results, continuously improve, promote equality and fairness, value each other and work together.



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Introduction

The activist Adrienne Rich talked of transforming society by 'empowering the most powerless and building from the ground up'.

The Citizens Advice service empowers people to exercise their rights and resolve their problems. It helps them build skills and confidence, and play an active role in their community, through volunteering and in other ways. And it uses client evidence as a force for the wider good, improving local and national policy.

We know that many of those we work with are among 'the most powerless'. Many face multiple disadvantage, with, for example, poverty or class combining with their race, disability or sexual orientation to make a complex set of problems and barriers to overcome. Helping people overcome these barriers from the ground up is what the FAIR equality and diversity strategy is all about.

FAIR 2008-2011 gives a renewed sense of direction for our work on equality and diversity, strengthening our commitment to develop and deliver a range of discrimination advice and policy services in partnership with others.

To make FAIR 2008-2011 a reality we will need to build on the successes of the previous FAIR strategy 2004-2008; move with changes in the equality, diversity and human rights arena; and focus on making progress in key areas. FAIR 2008-2011 therefore provides three clear priorities for action that we hope will enthuse and galvanise staff and volunteers in bureaux and Citizens Advice.

FAIR is pivotal to the core business and healthy functioning of the Citizens Advice service. We hope you find it useful in your work.



David Harker

David Harker
Chief Executive

Hilary Watkins

Hilary Watkins
Chair

Executive Summary

Fair, Accessible, Inclusive, Relevant, (the FAIR equality and diversity strategy) applies to the work of Citizens Advice and bureaux, and to the work Citizens Advice does to support bureaux. It applies to England and Wales.

The FAIR strategy 2008-2011 aims to:

- develop and deliver discrimination advice services, from first point of contact to resolution, in partnership with others
- make equality and diversity part of all we do.

It sets three priority areas, with bureaux and Citizens Advice working together to:

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

To make FAIR happen:

Bureaux will decide on actions within their annual business planning process and include them in their business plan. In order to focus efforts on achieving the three FAIR priorities the strategy contains a short list of recommended actions (see pages 14-17). Citizens Advice will provide resources, including training, guidance, and funding where possible, to support bureaux' delivery of the strategy.

Citizens Advice divisions will include actions that contribute to delivering the FAIR strategy in the annual corporate business plan. From this, Citizens Advice will publish and report on an annual Equality Scheme.

FAIR was approved, subject to further input from bureaux and Citizens Advice staff, by the Citizens Advice service Trustee Board in July 2008.



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Progress on the FAIR equality and diversity strategy 2004-2008

Thanks are due to all those in bureaux and Citizens Advice who have taken up the challenge of FAIR – many with relish, some with initial trepidation or scepticism! We have a lot to be proud of.

1.1 Improvements and impacts

There are simply too many improvements across bureaux and Citizens Advice to include every piece of work and the results we achieved. Some highlights are given below.

Achievements in the FAIR aim of becoming a first point of contact for discrimination advice in partnership with others

In 2005 discrimination became a core advice topic at general help level for bureaux.

Citizens Advice established sound working relations with government departments leading on equality issues and with the new Equality and Human Rights Commission (EHRC).

The Majority Matters projects:

- piloted specialist discrimination casework in 7 bureaux in England and Wales;
- provided face-to-face training for 600 people on discrimination advice;
- created e-learning tools which bureaux can still use.
- created a toolkit to help advisers run discrimination cases and a much-used online forum for advisers to discuss discrimination and other employment issues
- increased the number of cases receiving second-tier advice from Specialist Support by 20 per cent (over 600 cases a year in total)
- were successful partnerships with the Muslim Council of Britain, The Age Employment Network and the Village CAB
- strengthened bureaux' relationships with religion and belief and Lesbian, Gay and Bisexual communities.



In 2008/09, 20 bureaux in England and Wales received just over £750,000 from the EHRC's first ever grants programme. This is for a wide-ranging portfolio of work promoting good relations and human rights, and thirteen bureaux received grants for discrimination casework and representation.

The number of discrimination specialists in bureaux increased from 9 in 2004/05 to 32 in 2006/07.

The number of discrimination problems bureaux see appears to have decreased year-on-year, but this is due to changes to our statistical recording system and we are now able to record discrimination advice more accurately and in greater detail.

Achievements in the FAIR aim of making equality and diversity part of everything we do

20 per cent of new volunteers in bureaux in 2006/07 came from Black and Minority Ethnic (BME) communities.

Bureaux using FAIR increased from 29 per cent in 2005/06 to 59 per cent in 2007/08¹.

The National Partnership Team worked with bureaux to improve services for disadvantage groups including veterans, lone parents, migrant workers, Gypsies and Travellers, older people and people with learning difficulties.

We ran successful national campaigns, for example on destitute asylum seekers, vulnerable workers, ex-offenders and people with mental health problems.

We improved our ability to measure how well we are doing on equality and diversity and the impact of FAIR, through better statistical information and increased use of Management Information by managers in Citizens Advice and bureaux.

IT support for disabled volunteers and their managers improved. For example, there was a significant rise in the number of accessibility-related support requests to the IT Service Desk and of IT accessibility audits done for bureaux.



¹ Bureau Feedback Survey.

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Adviceguide and AdviserNet developed an equality proofing tool to make their content more relevant to people from minority communities.

The Self Organised Network Groups² helped the service make equality and diversity part of all we do in a wide range of ways, for example providing access audits for bureaux, promoting the service at Prides, raising awareness of women's issues, and developing an equality impact assessment process for the Citizens Advice Savings Programme.

Sixty per cent of respondents in the 2008 Citizens Advice staff survey believed that we are an equal opportunities employer, up from 47 per cent in 2005.

1.2 Unmet challenges

There are many areas where, despite the good work done through FAIR so far, there is still room for improvement. Here we highlight the three most urgent challenges facing the service.

Development of discrimination advice services

Discrimination is the eighth most common problem on which people want advice, but in the top three problems for which they can't get help³. Discrimination is often part of a complex set of problems, that can include housing, benefits, debt, and relationship problems.

Most of the work done so far has focused on employment discrimination. This is important because 83 per cent of employers⁴ say they can flaunt equality laws with impunity. However we also need to extend to other key areas where discrimination happens, for example, the provision of goods, facilities, services, housing and public functions.



² The SONGs are the National Black Workers Group, National Women's Group, National Disabled Workers Group and the National Lesbian, Gay and Bisexual Group.

³ Causes of Action, Legal Services Research Centre.

⁴ Equality and Human Rights Commission, 'Fairness a new contract with the public'.

Bureaux have highlighted⁵ the need for an ongoing programme of discrimination and human rights learning and development for a range of roles (including new generalist advisers, guidance tutors, advice session supervisors and refresher training for existing advisers). This should include discrimination and human rights enquiries and casework, and training on wider equality and diversity issues. If advisers are to effectively identify and act on discrimination cases, funding needs to be identified urgently for these training programmes.

However, training is only one part of the picture: it is also essential that there is increased second tier support for casework and representation; and that bureaux and Citizens Advice leaders continue to support and promote the development of discrimination advice services.

Increasing the diversity of the service's leadership

Since 2004 the diversity of Citizens Advice staff at senior management level has decreased in relation to ethnicity and disability. The diversity of bureaux managers and trustees in relation to ethnicity and disability has not improved and in some areas has decreased.

Statistical and anecdotal evidence show a better record overall in other areas such as gender and sexual orientation, but we know there is much to be done to ensure that the service supports leaders of all backgrounds.

Understanding who is in greatest need

The Citizens Advice corporate strategy 2008-2011, our Access strategy and the original FAIR strategy all refer to 'reaching people in greatest need'. It is clear that the service makes great efforts to reach marginalised people and communities and those with serious and complex problems.

However there is not a common understanding of what 'greatest need' means in practice. There is no clear picture of how social exclusion, discrimination and other forms of inequality interrelate and affect who does and does not seek advice from the service. Nor how they affect clients' options and their likelihood of getting a positive outcome, whether through advice or policy interventions.

⁵ Responses to the Savings Programme review of training, and to the Discrimination Advice consultation. It is intended that human rights be covered within discrimination, rather than as a separate topic.



2

The external context

This section highlights the most significant changes in the external context that affect equality and diversity both since the initial FAIR strategy and looking forwards five years.

2.1 The economy

According to some sources, every index – income, property, health and longevity, educational and occupational achievement – reveals a less equal society than at any other point in modern times. The current economic downturn will increase pressure on individuals' and communities' resources. A tightening of belts is often accompanied by a hardening of attitudes. Therefore not only are we likely to see more clients with financial problems, but also more clients with problems of domestic violence, discrimination, and other forms of abuse.

The poor economy, combined with pressures placed on many bureaux by Legal Services Commission contracts, Community Legal Advice Centres and Networks (CLACs and CLANs), may lead some to question the relevance of work on equality and diversity. While this is understandable, the opposite is actually true. In a competitive environment we need more than ever to show how we tackle inequality and reach those in greatest need.



2.2 From 'equalities' to 'equality, diversity and human rights'

The opening of the EHRC, and the findings of the Equalities Review, both in 2007, shifted the agenda away from 'equalities' to 'equality and human rights'. In summary:

- outside of the Citizens Advice service the 'equalities' agenda has traditionally focused mainly on the three target groups of women, BME and disabled people
- the current approach of 'equality and human rights' are the goals the Commission wants for all of society – men and women, white and BME people, non-disabled and disabled people. It widens its scope to include age, sexual orientation, religion and non-religious belief, as well as other disadvantaged people such as those in poverty, carers and migrant workers.

The Citizens Advice service has long had a more inclusive approach to equalities, and the FAIR strategy 2004-2008 has already started to broaden our agenda out to equality and diversity and, to a lesser extent, human rights. We now need to build on the equalities agenda and ensure our work contributes fully to the wider goals of equality, diversity and human rights. This means taking into account in all our work the causes of disadvantage, discrimination, and social exclusion and their impact on our clients and the public. For example, poverty, rural isolation, gender, race, ethnicity, disability, mental health, sexual orientation, age, religion and belief, nationality, language and basic skills needs, HIV status, marital or civil partnership status, class or any combination of these factors.

It includes developing our understanding of the relationship between income inequality and other types of inequality, such as discrimination. We also need to develop our understanding of how to apply human rights principles in the advice process and our policy work to get better outcomes for clients and the public.



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2.3 The Equality Bill

The Equality Bill is included in the government's legislative programme for 2008/09. It is likely to:

- introduce a single equality duty, requiring public bodies to consider the diverse needs and requirements of their workforce, and the communities they serve, when developing employment policies and when planning services
- extend existing positive action measures
- make the law more accessible and easier to understand, by bringing together nine major pieces of legislation and around 100 other laws in a single Bill.

The Bill will have implications for our local authority strategy, bureaux' service level agreements and our need to evidence how bureaux help public bodies meet their single equality duty. It will have major implications for training courses and learning materials for advisers, specialists and other roles, and the content of Adviceguide and AdviserNet. Bureaux' and Citizens Advice's policies on employment and services will also need to be updated.

2.4 Local government

Equality and community cohesion feature more strongly than ever before on local government agendas. Bureaux can shape the agenda using evidence from their clients who experience discrimination, social exclusion or other forms of marginalisation. In England, this will be through involvement in Local Strategic Partnerships and the development of Comprehensive Area Agreements. In Wales through Local Services Boards that are delivering the Community Strategy through Local Delivery Agreements. An increasing focus of national and local governments on community empowerment is also likely to impact on priorities.



2.5 Demographic changes

An ageing population, changes in migration, and the rise in people from mixed-race backgrounds will have significant impacts on society and bureaux. So will the use of new technologies for accessing advice, particularly by younger people.

2.6 The political climate

Changes in the national political climate may lead to more reliance on Europe for positive legislative developments in the equality and human rights fields. Locally, the political tone of some authorities, for example where the British National Party are strong, needs to be taken into account. Many bureaux operate in areas that are covered by the Home Office's "Tackling Extremism" Agenda.



3

Internal trends

This section looks at the major current and future developments within the service that affect our equality and diversity priorities.

3.1 Bureaux consortia

More bureaux are working in consortia and formal or informal partnerships with each other and other agencies, in order to relate to county-wide Local Area Agreements and Local Delivery Agreements, develop as CLACs or CLANs, for funding, etc. Bureaux consortia could increase bureaux' ability to show how they help local authorities meet their targets under the local government Equality Standard; and will affect the development of discrimination advice services.

3.2 Access strategy

The introduction of the Citizens Advice service Single Telephone Number and Gateway assessments (the Access strategy) gives rise to a number of opportunities and challenges to our ability to ensure those in greatest need can get advice.

3.3 Preventative work

The emphasis within new preventative work, such as Financial Capability, on including marginalised individuals and groups is a very welcome development. It provides increased opportunities to tailor advice and policy solutions to different people's different circumstances and needs.

3.4 Use of data

The ability to analyse our client data and evidence according to the gender, ethnicity, age, income etc of our clients (thanks to the use of CASE⁶) will significantly improve our effectiveness nationally and locally to understand client needs.

⁶ CASE is the case recording software used by CAB advisers.



3.5 Leadership diversity

The decrease in diversity at senior level across the service shows that we need to do more than have excellent policies in place. From external communications and campaigns to how we are seen to model the behaviours and attitudes that support the service values - more needs to be done to improve performance and perception and attract senior people from minority backgrounds.

3.6 Working patterns

Flexible and home working can bring both benefits and disadvantages from an equality and diversity perspective, and the trend towards these working patterns will need to be carefully managed and monitored.

3.7 The Citizens Advice service strategy 2008-2011

The Citizens Advice service strategy 2008-2011 identifies four key goals and a fifth cross-cutting goal:

1. provide easier and faster access to quality advice and information for more people
2. strengthen our voice in social policy
3. develop the Citizens Advice Bureau network
4. develop new initiatives in advice
5. our commitment to equality.

The FAIR strategy 2008-2011 dovetails with the overall service strategy and will help us make progress towards each of the five goals and the equality and diversity targets set out in the corporate strategy. More detail is given below.



4

The FAIR strategy 2008-2011

4.1 Aims

The overall aims of the FAIR equality and diversity strategy 2008-2011 are to:

- develop and deliver discrimination advice services, from first point of contact to resolution, in partnership with others
- make equality and diversity part of all we do.

4.2 Working definitions

Equality: our common humanity makes us equal in worth and rights.⁷

Diversity: the visible and non-visible differences between people.

Human rights: the basic rights and freedoms to which all people are entitled.

Discrimination: unfair treatment that results in disadvantage

Social exclusion: marginalisation due to poverty, low education or life skills.



⁷ Our definition of equality is based on article 1 of the Universal Declaration of Human Rights which says 'All human beings are born free and equal in dignity and rights.'

4.3 FAIR 2008-2011 Priorities

The following priorities were chosen based on what we learned from consulting⁸ on and implementing FAIR from 2004-2008, the progress made, the remaining challenges the service faces, and to ensure delivery of the overall corporate strategy.

The priorities apply to the work of Citizens Advice and bureaux, and to the work Citizens Advice does to support bureaux.

1. To increase the availability and quality of discrimination advice and policy work

If we challenge discrimination effectively, we can prevent future abuses, as well as empowering some of the most disadvantaged people in society to realise their rights. The creation of the Equality and Human Rights Commission provides a unique opportunity to become part of a coalition working to challenge discrimination and promote equality and human rights.

For all bureaux this priority means ensuring that all staff and volunteers are up-to-date on how to identify and advise on discrimination problems and to help create an evidence base on discrimination. For many bureaux it will also mean increasing the availability of casework and representation services, and running local campaigns.

Nationally we aim to establish strategic partnerships with equality and advice organisations to improve discrimination policy, campaigning and advice outcomes. This will include securing funding and resources. Work is already underway through the discrimination workstream of the Working Together for Advice project (2008-2010) in partnership with adviceUK and the Law Centres Federation, and in Wales to continue the transfer of expertise initiative with the EHRC.

This priority will contribute to achieving the following objectives in the corporate strategy:

- provide easier and faster access to quality advice and information for more people
- establish systems to gather evidence from new services
- develop new initiatives in advice.

⁸ FAIR strategy consultation 2004; core service consultation (discrimination as a core advice topic) 2005; membership scheme consultation 2004; discrimination advice model consultation 2006; corporate strategy consultation 2007.



4

Targets (from 2008-2011 Corporate Strategy)	2008/09	2009/10	2010/11
Public and stakeholder awareness of the Citizens Advice service as a point of contact on discrimination issues increases	50%	60%	70%
Access to advice and information on discrimination and human rights increases			Evaluation
Increased percentage of discrimination cases identified by bureaux	80%	90%	95%
Increased number of discrimination issues advised on	40,000	70,000	100,000

2. To diversify our trustee boards and management, and increase their knowledge of equality, diversity and human rights issues

Having a diverse leadership, who are knowledgeable about equality, diversity and human rights is critical to the legitimacy and credibility of the Citizens Advice service in our role as policy influencers, campaigners, service providers, employers and volunteer agencies. It is increasingly important to funders. Tackling the lack of diversity is not a simple issue that can be addressed only, for example, by policies or advertising in the right places. Therefore a concerted programme of action needs to be developed both for Citizens Advice and to support bureaux. This should include innovative ways for people to shape the service or be involved in governance without having to be part of formal committees.

It is pivotal to the corporate strategic objective of building a strong and diverse workforce.

Targets (from 2008-2011 Corporate Strategy)	2008/09	2009/10	2010/11
Percentage of bureaux managers and trustees from 'under-represented' communities increases	7%	8%	9%
Percentage of BME volunteers and staff is increased	10%	11%	12%



3. To develop a common understanding of 'greatest need'

The goal is to develop a common understanding of greatest need and inform service and policy planning and delivery. This is key to achieving the FAIR aim of making equality and diversity part of everything we do.

We will work across the service to identify where we already tackle this issue well, generate debate and fresh thinking, and develop a set of criteria or questions that can be applied nationally or locally. We will also look at how national and local government and other agencies approach greatest need.

The idea is not to say that x and y demographic groups are always in greatest need (which would be impossible to do and not valid in most contexts), but to help make sure that as a service we:

- understand the relationship between social exclusion and other forms of inequality, and the multiplier effect of discrimination on disadvantage
- apply a consistent approach in decision-making about new work (e.g. Gateway, preventative services) that takes into account issues such as the seriousness and complexity of the problem, complicating factors such as the impact of key life events or violence, identity or discrimination, a person's ability to help themselves or availability of other sources of help
- are better able to inform Local Authority plans, show that bureaux are key local agencies who work with marginalised groups, and help authorities meet their equality, social exclusion and community cohesion targets. This will help the service to make the connection for local authorities between advice work, training volunteers from marginalised communities and up-skilling target groups.

This will contribute to achieving the objectives in the corporate strategy to focus on improving the lives of those in greatest need and develop new initiatives in advice.

Targets (from 2008-2011 Corporate Strategy)	2008/09	2009/10	2010/11
Increase in stakeholder ratings that we are: focussing on those most in need			83%
Client satisfaction with the Citizen Advice service, across a diverse user profile, increases or is maintained	75%	77%	80%



4

4.4 Delivery

Citizens Advice

Each division will determine their annual actions that contribute to the three FAIR priorities, as a standing item within the corporate business planning process, in consultation with the FAIR team. An annual FAIR meeting for representatives of each division will provide a forum to share ideas and experiences and for detailed planning.

Progress will be monitored through the three cross-divisional corporate business planning meetings each year and Key Performance Indicators reviewed monthly by the Executive Board.

Information will also be extracted from the corporate business plan and published separately as the Citizens Advice Equality Scheme⁹. The Equality Scheme will be reported against and updated annually.

Bureaux

Bureaux and their operating circumstances vary enormously which is why the strategy sets the three FAIR priorities outlined above. How these will be defined in detail and implemented will depend on bureaux' local circumstances.

Feedback from bureaux suggests that it is better to commit only to a small number - one or two - actions a year that can be resourced (fundraised for if necessary) and delivered on.

The actions should be decided within the bureau's annual business planning process and included in the business plan. Citizens Advice area staff will be able to support this through the Business Planning Visit. Bureau audits will verify what action has been taken (in line with the relevant Equality and Diversity requirements in the Membership Scheme).

In order to focus efforts on achieving the three FAIR priorities it is recommended that bureaux choose actions from the following short list. A diagram of these actions is shown on the page 21.

⁹ Citizens Advice has produced an equality scheme since 2005, in the spirit of the public sector equality duties, as part of its commitment to best practice.



The most important action bureaux can take is:

1. Increase the availability and quality of discrimination advice

Many bureaux have a long history of excellent work in other areas of equality and diversity but have made clear that they lack confidence in dealing with discrimination enquiries. This view is supported by findings from Quality of Advice Audits.

It is therefore urgent that we improve advisers' and other key roles' ability to explore and identify clients' potential discrimination issues and help them find a solution. Advice session supervisors, guidance tutors and people doing Gateway assessments and telephone advice have important roles to play.

All bureaux that have not yet done so need to make sure all relevant staff and volunteers are confident to general help level on discrimination in employment and the provision of goods, facilities and services. There are training courses and e-learning resources available. Over the four years of the strategy, further resources¹⁰ will be made available, including on other areas of discrimination and human rights.

Many bureaux will also seek to increase the availability of casework and representation services. Citizens Advice will do all it can to support, and identify resources, for this vital work, and ensure learning across the service.

Other key actions bureaux can take are:

2. Increase the bureau's evidence and social policy action on discrimination and human rights

An online equality and human rights campaigns toolkit and a programme of training are available for bureaux. Completing Bureau Evidence Forms and Local Action Report Forms is also vital for building local and nationwide evidence bases.

3. Diversify the trustee board and management, and increase their knowledge of equality, diversity and human rights issues

Resources are available on CABlink and the Bureau Management Information System and Citizens Advice will seek to increase the support available in these areas.

¹⁰ The Working Together for Advice discrimination workstream, for example, is due to produce materials in 2009/10.



4

4. Get involved with the national work to develop a common understanding of greatest need and apply this in the bureau's local area

The FAIR team will develop an action programme for Citizens Advice and bureaux in early 2009. Watch out for news on how to get involved.

5. Share good FAIR practice with other bureaux and Citizens Advice

Getting involved in your area's Equality Forum is an excellent way to share your good practice, or contact the Equality and Diversity Specialist in Membership Services Division.

For more detailed suggestions of actions, see the template equality scheme for bureaux on CABlink, focusing on those that relate to the priority areas.



FAIR actions for bureaux 2008-2011: the overarching priority is the action at the centre of the target. Which other actions bureaux choose will depend on local circumstances



5

A note on what's not included

Some of the key concepts in the 2004-2008 FAIR strategy – that feedback showed were very useful to readers – remain essentially the same and for the sake of brevity are not repeated here. These are:

Section 2.1 - Which explains why treating people equally does not mean treating them the same

Section 3 - The moral, legal and business cases for equality

Section 6.4 - An explanation of our dual track approach that combines mainstreaming and specific work

If you are new to FAIR or want to refresh your memory you can see them at:

www.citizensadvice.org.uk/index/aboutus/equality_diversity_strategy.htm



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