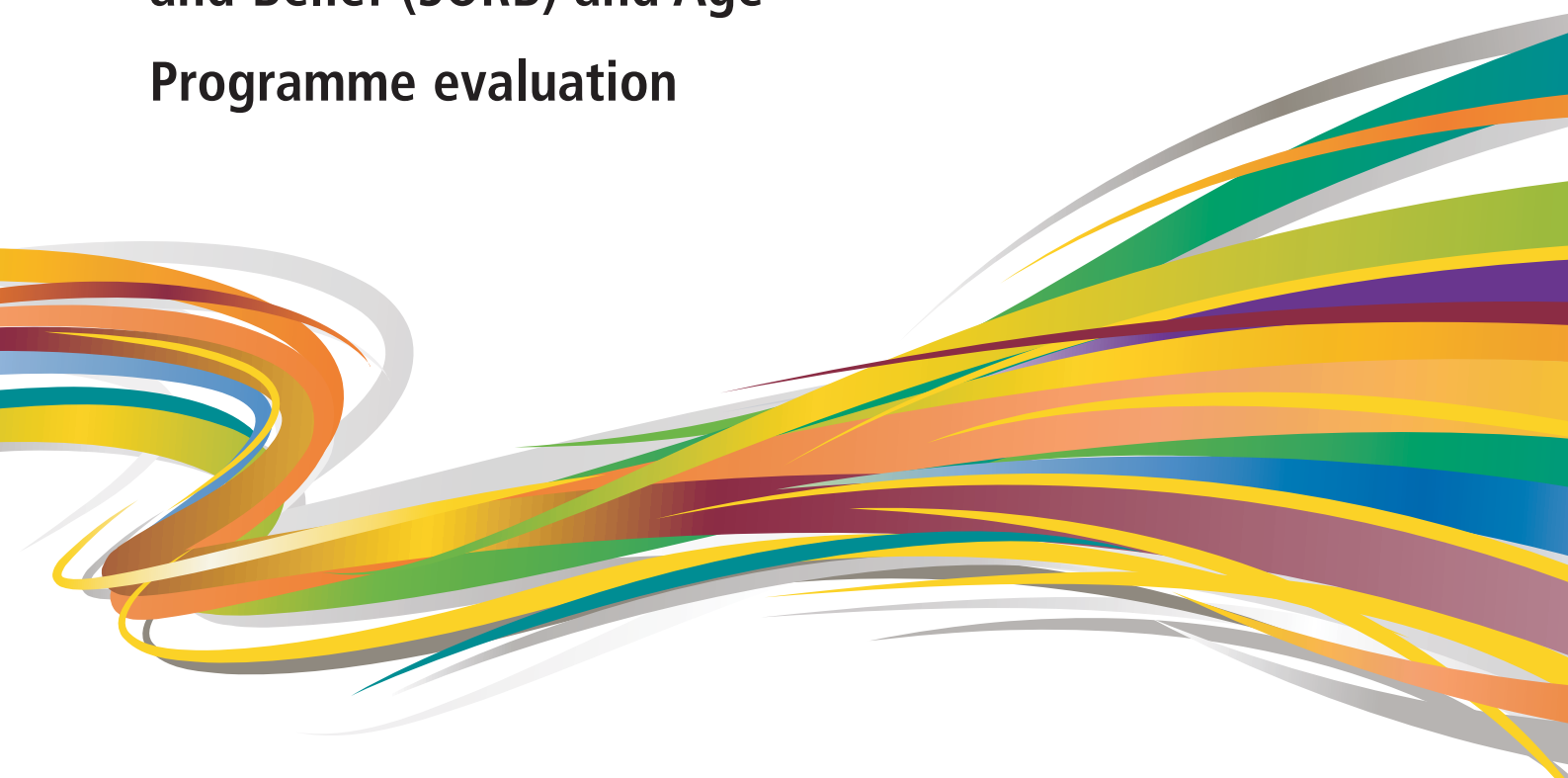


# Majority matters

Sexual Orientation, Religion  
and Belief (SORB) and Age

Programme evaluation



September 2007

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## Introduction

Citizens Advice is an independent charity and membership organisation. There are 433 Citizens Advice Bureaux (CAB) across England, Wales and Northern Ireland, all of which are independently registered charities and members of Citizens Advice. As one of Britain's leading providers of independent, impartial and confidential advice, the Citizens Advice service deals with 2 million clients and over 5.7 million new problems every year. More than 6,200 paid staff and 12,800 trained volunteers provide advice from more than 3,000 service outlets including community centres, GP surgeries and hospitals, courts and prisons. In 2006/07, CAB gave advice on 26,884 discrimination problems.

Since 2004, the Citizens Advice service has worked towards becoming a first point of contact for discrimination advice, in partnership with others. Significant progress was made through an earlier Business Enterprise and Regulatory Reform (BERR, formerly DTI) Equality in Employment project. Access to SORB and Age funding provided an ideal opportunity to develop the CAB service's capacity to develop its capacity to provide specialist discrimination advice, to its raise profile amongst Lesbian, Gay, Bisexual and Trans (LGBT) and religion and belief communities, and to develop national and local partnerships with equality organisations.

## The aims of the two projects

This report is an evaluation of two DTI-funded projects, known as the 'Majority Matters' programme within the Citizens Advice service.

### The SORB project

A grant of £529,520 to support the employment equality (sexual orientation, religion or belief) regulations in the run up to establishment of the Equality and Human Rights Commission (EHRC), implemented between November 2005 and March 2007 (with a no-cost extension for some bureau-level work until September 2007)

This project was implemented at national level, and through seven pilot bureaux. Its objectives were to:

1. build generalist advice capacity to identify discrimination cases
2. build specialist employment discrimination advice capacity
3. build towards and pilot methodologies for regional discrimination expertise
4. raise awareness of the regulations in 'hard-to-reach' religion and belief and LGBT communities
5. use local volunteers and local radio to increase awareness of the regulations

### The Age project

A grant of £173,854 to enhance the capability of bureau advisers to deal with age discrimination through advice, casework materials, and training, implemented between April 2006 and March 2007.

The project was implemented entirely at national level. Its objectives were to:

1. train generalist and specialist advisers
2. reinforce the information systems that advisers draw their advice from
3. provide second tier specialist support on age discrimination

In early 2006, the DTI agreed a further £20,000 for an options appraisal for Citizens Advice on future approaches to the delivery of discrimination advice, and a series of three national seminars with advice sector, equality organisations and the EHRC transition team. A separate report on these was delivered in mid-2006.

## The evaluation

This evaluation was conducted between May and August 2007 by Citizens Advice staff. It:

- brings together all relevant quantitative and qualitative data gathered from the Citizens Advice management information systems and the monitoring data collected by participating bureaux
- illustrates how the project addressed capacity building for discrimination advice
- identifies the benefits and outcomes, both immediate and long term, of the training and capacity building work that has been undertaken
- highlights examples of good practice, identifies challenges and makes recommendations for the continued improvement of this important advice service.

## Summary of achievements

Both projects have significantly enhanced the CAB service's overall capacity to challenge discrimination, and to work effectively with communities and bureaux to ensure access to justice for people protected under new SORB and Age regulations.

### SORB project

- 'new strand' discrimination cases in bureaux in England and Wales have significantly increased over the life of the project: a nine per cent increase in religious discrimination cases, and a 17 per cent increase in sexual orientation cases
- generalist advisers' capacity to identify discrimination cases has been enhanced through a well-received programme of training for 163 advice session supervisors (key bureau staff responsible for the quality of advice)
- a range of online training resources on discrimination have been developed as a sustainable resource for advisers and advice session supervisors
- the range and quality of information on discrimination issues on Adviceguide (our public information site) has increased. 3,328 people accessed online information on discrimination through Citizens Advice fact sheets
- significant investment has been made in resources for development and support for employment discrimination caseworkers: including the creation of accredited training by Specialist Support in partnership with Wolverhampton University, an improved employment casework management toolkit for advisers and caseworkers, and an online consultancy resource provided by Specialist Support
- the seven project bureaux have each made significant progress in a number of areas, described in more detail in below:
  - developing their discrimination casework capacity: bureaux supported a total of 39 SORB and 185 other discrimination cases
  - developing local partnerships with LGBT and religion and belief communities and organisations
  - building awareness of the regulations
  - building referral networks for discrimination cases
- the diverse experiences of the bureaux have also generated valuable learning, case studies and opportunities for local learning on becoming a first point of discrimination advice, in partnership with others. These experiences have

informed the development in the CAB service's national approach to discrimination advice, agreed by Citizens Advice trustees in mid-2006, and endorsed through a national bureau consultation. This formed the basis of collaborative work with the Law Centres Federation and advice<sup>UK</sup>, designed to develop a shared vision for how access to advice on discrimination at regional/local level can be improved

- the project also strengthened the CAB service's relationship with different religion and belief groups through the establishment of the Religion and Belief Reference Group.

### Age project

The Age project was also successful in terms delivering training in bureaux and improving public access to information.

- through the project, 259 guidance tutors were given the tools and skills to facilitate training within their bureaux
- 1,296 people accessed online information on age discrimination
- 91 people made enquiries regarding age discrimination to bureau via Q Call (see section 12 for further details)
- specialist 2<sup>nd</sup> tier support consultancy was available online to external agencies for the first time
- Citizens Advice has become an active member of the Age and Advice Network (hosted by Help the Aged).

## Project management and communications

A Citizens Advice Project Management Board was established to lead both of the SORB and Age projects. It comprised of key decision-makers. Their role was to decide on strategy, oversee management of the project and check on progress.

A national project manager was appointed to take responsibility for the day to day management of the initiatives. Quarterly reports about expenditure and overall progress were produced by the project manager for the Project Management Board, the support groups and funders.

Bureaux and other CAB stakeholders were kept informed about the project through regular updates on the Citizens Advice service intranet, briefings sent to regional managers and via newsletters and regional mailings to bureaux. The project manager, Specialist Support Team and project bureaux also gave presentations and information about the work of the project at a range of national and regional CAB service events.

## External partnerships

### Religion and Belief Reference Group

A Religion and Belief Reference Group was set up to ensure that materials produced for the SORB project accurately reflected the experiences of religion and belief communities. This group was made up of representatives from:

- British Humanist Association (BHA)
- Faithwise
- Muslim Council of Britain (MCB)
- Hindu Council UK
- Network of Sikh Organisations UK
- Board of Deputies of British Jews

### Village CAB

All training materials produced on sexual orientation were developed with input from the Village CAB.

### The Age and Employment Network

Specialist input on age issues was achieved in the age project through partnership with The Age and Employment Network (TAEN).

## The SORB project

This section discusses the approach taken, the outputs and impact. It captures the learning and makes recommendations for each SORB objectives.

### Objective 1: build generalist advice capacity to identify cases

#### Training workshops

One of the key activities used to achieve objective 1 was the development and delivery of a two day training course developed by Citizens Advice Training Services. The course covered strand-specific issues, and the skills and approaches needed to ensure generalist advisers identify and explore potential discrimination issues effectively.

The course was delivered by Citizens Advice tutors who have experience in tutoring on employment discrimination and advice session supervision. Input and facilitation on religion/belief was provided by Faithwise (contracted by the MCB), and on LGBT issues by the Village CAB. Support in the development of materials was also received from members of the Religion and Belief Reference Group.

The examples of client scenarios that the partners contributed were helpful in developing the learning materials. The success of the training which was delivered fifteen times in England and Wales was due in part to the valuable partnership created between the advisory groups and Training Services.

Volunteers make up 77 per cent of advice service workers in bureaux. In common with the rest of the voluntary sector, CAB experiences a high turnover of volunteers. In order to increase the impact and sustainability of the learning, training for the programme was targeted at advice session supervisors. This key group of staff are more likely to have longer terms of service. Their role is to supervise generalist advisers and quality-control their day-to-day work and case-records.

## Participation levels

163 advice session supervisors attended the courses, exceeding the target 150.

Table: geographic spread.

Regions and Wales	No. of delegates
East	12
London	25
Midlands	19
North	25
North West	10
South East	39
South West	16
Wales	17
<b>Total</b>	<b>163</b>

## Workshop evaluation

Evaluation forms were given to all workshop participants and a telephone interview survey of a sample of participants was undertaken (see appendix 3a and 3b for full details)

Participants reported:

- the course was very successful and would help/had helped them support advisers to identify discrimination issues
- 100 per cent of delegates asked in the telephone interviews said that they feel more confident as a result of the course in helping advisers to identify cases of discrimination
- 89 per cent of delegates on the course thought it was very beneficial to have trainers from communities likely to experience discrimination, and to be able to ask questions; the remaining 11 per cent indicated some benefit.

Comments included:

“Lots of food for thought - things I'd never thought of before.”

“Wasn't looking forward to it but enjoyed it and was glad I attended.”

“Pulled together what is meant by discrimination. Lots of tips for back in bureau.”

## Online training

To maximise the training investment made during the project, all of the SORB and Age training has been converted into two e-learning “bite size” packages. These have been available online to all bureaux workers in England, Scotland and Wales since April 2007.

For advice session supervisors

- discrimination – why advisers may not spot cases
- helping advisers with discrimination cases

For generalist advisers

- explaining the questionnaire procedure to clients
- discrimination quiz - how much do you know?

Electronic training of this type both extends the reach and longevity of the work, and improves the quality of discrimination advice available to clients.

## Objective 2: build specialist employment capacity to provide discrimination advice and casework

### Sustainable learning

**Accredited training for caseworkers:** Citizens Advice have worked to build and extend the impact of the project training by working in partnership with Wolverhampton University to develop a training programme which is accredited by them. The programme is designed to equip specialist advisers or caseworkers with the skills and knowledge needed to support clients in this important area of advice work. It covers all aspects of employment discrimination, including race, disability and gender, sexual orientation, age, religion and belief. The accredited course has been piloted and ways to open the course for external organisations is being explored.

**An online employment discrimination casework management system:** this has been created by updating and extending a toolkit developed through the Equality in Employment project. It supports the work of employment/discrimination caseworkers by providing a comprehensive system that facilitates the effective management of a client's case from the initial investigation stage through to a tribunal hearing, if necessary.

The caseworkers' management system is used in England, Scotland and Wales. The new version has had consistently good feedback:

- easier to use
- greater consistency
- better written
- overall far better than the previous version

Positive feedback has been received from tribunal on the useful tables that can be produced using the system to set out agreed and disputed facts in a case.

**Enhanced specialist consultancy support for bureaux:** to increase the capacity of specialist employment advice to bureaux, two employment specialists were recruited to further develop and expanding the discrimination casework skills programme.

**Networking for employment/discrimination caseworkers:** five regional networking events were held to inform and update advisers of changes to the law and the availability any new resources available to them, such as the training courses, updated electronic guidance and the additional 2<sup>nd</sup> tier support. These networking events involved presentations from the Equal Opportunities Commission, the Disability Rights Commission, Acas and a Chair from Employment Tribunals. These network forums will continue.

**Online exchange for employment/discrimination caseworkers:** as a result of the experience of moderating a discussion forum for employment advisers, an on-line community has been created. The intention is to build on face-to-face events by encouraging knowledge transfer taking place before, during and after the events.

Experience has shown that discussion forums and virtual communities are more effective if the participants have met each other. A peer network has been created by the participants of the SORB training events. These networks are facilitated by electronic discussion forums for advisers. This supports the application of participants' learning by giving access to the specialist support advisers who originally delivered the workshops.

The on-line forum is maintained and it supports current users and encourages them to share knowledge. This has had significant benefits to advisers across the wider group. With on-line collaboration tools such as wiki's and blogs the knowledge of these advisers has been captured.

## Achievements

- discrimination cases handled by the specialist support equalities and employment rights team have shown a steady rise from 518 cases in 2005 to 622 cases in 2006, a 20 per cent increase

- during the Majority Matters SORB project's lifetime, bureaux in England and Wales experienced a nine per cent increase in enquiries about religion and belief discrimination, and a 17 per cent increase in sexual orientation discrimination enquiries
- 25 specialist employment advisers have extended and developed their expertise through the SORB project
- employment discrimination caseworkers are now better equipped to deal with discrimination casework. The casework management system was expanded from 9 to 15 topics. The number of standardised letters, fact sheets and examples for employment advisers to download and use in their casework has nearly doubled.

### **Objective 3: build towards and pilot methodologies for regional expertise**

#### **Activities**

SORB project provided funding for seven bureaux to receive grants of between £12,000 and £35,000 to deliver a series of activities, including:

- undertaking SORB and other employment discrimination casework
- establishing an active local referral network for discrimination cases
- establishing an active volunteer recruitment initiative to attract volunteers from disabled, LGBT and religion and belief communities
- developing increased/better links with the local LGBT and religion and belief community
- working with the project manager and regional offices to share information and learning with regional networks.

Bureaux were selected across a range of criteria which included:

- access to a range of different religion and belief and LGBT communities
- whether the bureau had existing employment casework expertise, a little or none
- situated in rural and urban settings
- having an experienced caseworker in one bureau that supported an inexperienced caseworker in another

The objective of the support was to develop and test approaches to the regional delivery of specialist discrimination advice, as well as to provide high quality advice and casework to clients.

Assistance was given to the bureaux by the central Specialist Support Team. They provided bureau caseworkers with a combination of consultancy and mentoring and training support in order to develop their discrimination casework skills.

## Outreach

Through the national partnership with the MCB, some pilot bureaux were put in contact with mosques or Muslim community centres in their area, and support was provided to develop working relationships, outreach and referral agreements. The national project manager also facilitated contact between bureaux and member of the Religion and Belief Reference Group organisations.

Additional material was produced by other organisations funded by the DTI/Department for Communities and Local Government to raise awareness of the SORB regulations. They included:

- a DVD developed by Law Centres Federation on discrimination on the grounds of sexual orientation
- a DVD developed by Leeds Animation Workshop

Both DVDs were distributed to key Citizens Advice departments, and through bureaux to local partners and community groups.

## Awareness raising

Publicity materials for the project were produced centrally for use in the pilot bureaux. Each bureau was able to adapt the material to reflect the local audience.

## Attracting volunteers

In addition a leaflet was produced for the pilot bureaux to use in volunteer recruitment. The leaflet targeted people from religion and belief and LGBT communities and encouraged volunteers from these sections of the community. These leaflets were sent to all bureaux and made available via the Citizens Advice intranet.

A buddying process was set up to provide support and encouragement for new volunteers. The process was publicised through existing internal networks and through the Citizens Advice newsletter, regional mailings and intranet.

## Achievements

The table below shows the detailed breakdown of casework by bureau. Overall, the project supported 226 employment discrimination cases, of which 39 were SORB cases, and 185 related to other equality strands.

### Breakdown of casework

Bureau	Sexual Orientation	Religion or Belief	Total SORB	Other discrimination cases	Total cases
<b>Barking and Dagenham</b>	0	2	2	18	<b>20</b>
<b>Bradford</b>	1	4	5	42	<b>47</b>
<b>East Grinstead</b>	2	0	2	22	<b>24</b>
<b>Flintshire</b>	2	1	3	25	<b>28</b>
<b>Newport</b>	12	4	16	49	<b>65</b>
<b>Village</b>	5	0	5	15	<b>20</b>
<b>Birmingham</b>	6	2	8	14	<b>22</b>
<b>Total</b>	<b>26</b>	<b>13</b>	<b>39</b>	<b>185</b>	<b>226</b>

Note: casework cannot be directly compared between bureaux. Some bureaux had part time caseworkers, while others began work in September 2006, and so were only half-way through their year's work at the end of March 2007.

Although demand for discrimination advice and casework increased steadily over the life of the project, the number of SORB cases was lower than anticipated.

There were a number of contributing factors including:

- building working partnerships with communities and supporters took time to establish: people from LGBT and religion and belief communities had extremely limited knowledge of their rights under the SORB regulations
- awareness of where to access advice and how to use advice services started from a very low baseline
- those bureaux who participated in awareness-raising activities in their local communities did so with caution. They were wary of creating long-term demands for services that might not be available once project funding ended
- recruitment and turnover of staff affected the rate of progress: two bureaux had SORB project staff leave to take jobs that offered better terms and conditions, and several bureaux faced delays in recruiting suitable caseworkers

- geographical location and local demographics affected the casework profile
- some initial lack of clarity about the national level relationship with MCB/Faithwise meant that developing relationships between bureaux and local beacon centres took longer than expected.

### Impacts on clients

The investment made through this project achieved significant benefits for individuals who had experienced discrimination or unfair treatment. The level of complexity of the discrimination cases dealt with meant that they could only have been resolved with the support of the specialist caseworkers. Many cases avoided the need to go to tribunal, and enabled some clients to remain in employment. In addition, much of the bureaux' wider outreach and awareness work provided community members with information about their rights, equipping them to deal with problems earlier and more effectively.

A client at East Grinstead CAB with severe dyslexia had recently taken on a new job. She was told after three weeks that she was making a lot of mistakes and she told employer that she was dyslexic. The following day she was dismissed and escorted from the premises past her colleagues. The case was taken up as a result of the project and client was supported in claiming disability discrimination. The case went to tribunal and the client was awarded £7,500

At the same bureau a client in her early 60s who had worked for her employer for 15 years had been dismissed and replaced by a younger man. Tribunal claims for sex and age discrimination together with unfair dismissal were submitted. The case went to a hearing and the parties agreed to a settlement of £10,000.

At Barking and Dagenham CAB a client suffering sex discrimination at work was awarded £8,500 after a three day tribunal hearing – the first contested hearing for the caseworker.

At Bradford CAB a Muslim client is being represented in a case against a national supermarket chain after being disciplined and dismissed for wearing clothing she believed was required to observe her religious beliefs. Whilst this is not yet resolved, it is a complex and sensitive case which the bureaux would not have been able to undertake without the specialist caseworker and specialist support made available through the project.

Newport CAB is advising a large group of visually impaired clients regarding the refusal of licensed minicab drivers to allow guide dogs to accompany their clients in minicabs. This case is currently being considered by Disability Rights Commission Cymru for support as a strategic Disability Discrimination Act (DDA) case.

Through links with Disability Access groups across North Wales, Flintshire CAB has been successful in developing casework under Part 3 of the DDA. It is representing

clients in cases involving access to shops, restaurants, public swimming pools and churchyards.

An East Grinstead CAB' client who was undergoing gender reassignment asked her line manager if she could use the disabled toilet until the reassignment treatment was completed. The line manager not only refused but also insulted her. She was forced to spend her lunch hours walking to and from her home to use the toilet. Following advice from the bureau, she approached her line manager's superior and informed them that the company faced a potential sexual harassment claim. She received an immediate apology and was hence forth able to use the toilet at work. She told the bureau that she would never have had the courage to take the issue further without their advice and support.

Newport CAB's caseworker was approached at an outreach session in a mosque by a man whose mother worked in a major department store. The previous year, she had asked for four weeks leave for the Hajj, but had only been allowed two weeks. Advice was given on her rights so that she could feel confident of her rights when she asked again.

Flintshire CAB has brought members of local disability organisations together to discuss any barriers they may face accessing services and facilities. The event was designed to help them understand their rights under DDA Part 3 and to raise awareness of the help available to them in accessing their rights.

### **Bureaux address clients' wider needs**

A client who settled her case for unfair dismissal, sexual orientation and disability discrimination with the support of Newport CAB, was also provided with support in making a Disability Living Allowance (DLA) claim with the help of Newport's disability benefits team.

A disabled client of Newport CAB who settled a DDA employment case also received support making a DLA claim.

### **Wider impact**

One DDA part 3 case supported by Newport CAB concerned a client who had been unable to gain access to a social club and had also been harassed. As part of the conciliation process, the social club agreed to a disability access audit.

A woman client who had been sexually harassed at a call centre by her manager was supported in bringing a case. She received £8,000 compensation from her employer and returned to work. Her line manager was disciplined.

Flintshire CAB has contacted the Commission for Racial Equality (CRE) regarding one of their clients who is an employee of a NHS trust which has had CRE support in

developing a race equality scheme. The bureau has raised the circumstances of their client, who has had ongoing disputes over pay and job grading. They have also been subjected to race discrimination and harassment

One of East Grinstead CAB's clients had worked for the same company for 8 years. The individual had problems performing their job due to back problems and the effects of a hip operation. He had been subjected to a disciplinary procedure. The bureau informed the employer of their duties and they immediately took action, ceasing the disciplinary process, and reallocating duties within the team so that the client was no longer required to lift heavy objects.

### Bureau-level impacts

To enhance the sustainability of the investment made in discrimination advice, bureaux used a variety of strategies to embed discrimination advice in the wider work of the bureaux:

- training days
- questionnaires for generalist and specialist advisers
- mentoring for other advisers on discrimination cases
- screensaver reminders
- case sheet reminders to ensure discrimination issues are raised where appropriate
- ensured that the bureau reflects discrimination issues in external events

The capacity and confidence of other advisers in the bureaux to identify and advise on discrimination cases has grown. Having a specialist caseworker in post to build the awareness, knowledge and referral process has been key to these activities and achievements.

The partnership with MCB has resulted in a small number of potential volunteers being identified through MCB beacon centres. The timing of volunteer recruitment cycles and the need to increase the resources available for volunteer recruitment are important considerations for future activities. In some bureaux, LGBT and minority religion and belief communities are already well represented amongst bureau workers. The take up from existing volunteers to become buddies to new volunteers was low.

The commitment of bureau managers has been key to the project's success. Their local knowledge and creative approaches in finding ways of supporting the SORB objectives have given the opportunity to pilot a number of imaginative outreach activities. For example, Newport CAB has worked with a beacon centre in Cardiff over the past year. Visitors to the beacon centre are able to book an appointment with a CAB adviser. The advisor then travels to the mosque to see them at dedicated sessions. This approach has generated a number of religion and belief discrimination cases, and rotating the sessions at different mosques has enabled the caseworker to reach different areas and members of the Muslim community in Cardiff.

The buy-in to the project from the bureau managers is also evidenced in the way that some of the bureaux with few resources are struggling determinedly to maintain the project momentum.

### Support for pilot bureaux from Citizens Advice

The service provided through Citizens Advice Specialist Support function was highly valued by both new and experienced caseworkers on the SORB project. Caseworkers were provided with individual mentoring and consultancy support, as well as access to the Wolverhampton Discrimination Casework course and short courses on specific topics.

### Objective 4: raise awareness of the regulations in 'hard-to-reach' religion and belief and LGBT communities

#### Activities

The table below summarises some of the ways that bureaux engaged with communities, to grow awareness of their rights and the availability of discrimination advice.

Bureau	With LGBT people	With religion and belief groups
<b>Bradford</b>	<p>Priority was give to building links with LGBT people</p> <p>Organisations were reached through joint training with the Equity Centre (LGBT umbrella organisation). The training has reached many organisations (including local authority bodies; NVQ team)</p> <p>Information for individuals was distributed on 'Top ten tips' cards and information was made available via the Equity Centre website and switchboard. <a href="http://www.equitypartnership.org.uk">www.equitypartnership.org.uk</a></p>	<p>Bureau has focused on ensuring gateway/generalist advisers identify potential religion and belief discrimination cases</p> <p>A presentation at Khidmat Centre</p> <p>Approaches to synagogues and Jehovah's Witness Kingdom Halls. 'Top ten tips' cards distributed</p> <p>Presentation at Polish awareness day</p>

Some links established with Calderdale LGBT network and Gay and Lesbian Youth in Calderdale: starting point is personal links. However, development of these links limited by short project timeframe

Plans to meet with chair of West Yorkshire Pakistani community and the local Sikh community; Bangladeshi Parishad leaflet

### Village

Prioritised reaching people who might not usually use 'LGBT-specific' services, and employers

Salford bureau (which hosts The Village) has an outreach project with Jewish community in Salford

Funded radio advert on Key 103 – aimed at employers and employees

Advert on the Pink Paper Website includes factsheet on employment discrimination [www.thevillage.org.uk](http://www.thevillage.org.uk)

Series of information sessions with LGBT organisations in Greater Manchester

Mailshots focusing on employment discrimination, and stands at regional conferences

### East Grinstead

Efforts to identify local LGBT community organisations, but none found. Contacted Brighton umbrella organisation Spectrum, who emailed LGBT organisations

Local religion and belief organisations invited to attend training sessions

Contact with LGBT organisations focusing on mental health, and on young people: supportive, but unable to spare people for training

Local event (with Uckfield CAB) for religion and belief communities cancelled when organising religion and belief organisation became the subject of a police investigation

Plans to contact Faith Forum in Crawley

**Partnership approach: two training sessions in 2006**

conducted with local authority, health providers and bureaux. Broad focus on employment discrimination, with SORB issues highlighted.

Discussions underway with Crawley Borough Council on possible training. Communicated using East Grinstead Observer.

### **Barking and Dagenham**

Contact with Caress, local HIV/AIDS support group, and talk at lunch event. Caress provided publicity through their mailing list

Through Faithwise, contact with London Muslim Centre and offer fortnightly session at LMC

LGBT forum: two presentations and regular attendance

Attended two meetings of Faith Forum, but hard to contact or work with

SORB Materials also distributed to community organisations, include Race Equality Council

Project information in Barking and Dagenham local authority newsletter 'Citizen', and contact with local authority equalities officers.

### **Newport**

Partnership with Stonewall Cymru SORB project, and LGBT helpline

Presentation to Islamic Society (community leaders)

Regular surgeries established in partnership with mosque (Beacon Centre)

Broad contacts through Employment Rights Network.

### **Flintshire**

No LGBT organisations locally: support for development of Encompass (see box)

In contact with councillor and member of local Muslim community, visiting prayer facilities and mosque in the region

In DDA work, collaborative work with Flintshire Disability Forum to get members to proactively identify DDA part 3 cases, and provide support to address.

Flyer developed for local Gypsy and Traveller communities, following closure of Wrexham CAB's dedicated Gypsy and Traveller project: includes Flintshire contact details and reference to discrimination advice.

Raise awareness of the SORB regulations and the project has been done by approaching local religion and belief and LGBT groups. In addition some of the bureaux found that approaching local councils and organisations with support groups for LGBT and religion and belief communities/Black and Minority Ethnic (BME) staff was particularly effective. This route gained a good participation rate. Running sessions for these organisations led to referrals and invitations to do more.

The effect on the number of new SORB cases brought to bureaux by outreach was low. This is in line with research suggesting that the number of SORB cases at a national level has been somewhat lower than anticipated. More ways of being in contact with a wide range of religion and belief groups is necessary. A broader range of publicity and a longer term approach to raising awareness and demand for advice is also a suggested solution.

### Utilising other resources

SORB information was updated on the CAB electronic advice tool AdviserNet, used by bureaux and also by the wider advice sector, and a link was added so that advisers could access the materials produced by Acas for employers and employees.

A DVD produced by the Leeds Animation Workshop on the SORB regulations was distributed to all bureaux and a DVD developed by Law Centres Federation was distributed to the pilot bureaux. Both DVDs were made available for use by key departments within the Citizens Advice service.

One of the elements of the partnership with MCB was bringing together their beacon centres with pilot CAB's. The Bureaux were to provide outreach sessions for employment discrimination cases. One of the beacon centres was in Stanmore, London Borough of Harrow where there was no SORB pilot bureau. However, Barnet CAB stepped in to provide the sessions and trained some volunteers from the centre to be advisers. Barnet CAB has a lot of expertise in specialist advice work and discrimination work and has now extended their expertise. It is a good example of a really productive partnership and shows the way in which initiatives of this kind can inspire and motivate action.

### Outreach relationships

Bureaux have a good practical understanding of their local community, and a clear idea of the groups within their community. Specific strategies are necessary when targeting services at LGBT or religion and belief communities, and particularly for reaching the most excluded people in society. Some bureaux struggled to find ways of engaging with SORB communities where community organisations serving these groups do not already exist, also where working relationships with existing groups are not already established. Bureaux developed different approaches for tackling these issues: some invested time and effort in establishing working relationships with community organisations. Other bureaux (such as East Grinstead) worked to build the awareness of ‘problem noticers’ such as GPs and housing associations. Flintshire CAB encouraged the establishment of a LGBT group through initial outreach and by providing a venue and support for the development of a LGBT community organisation.

In general, more progress was made in the 12 month period of the project in building up referral arrangements between bureaux than with external organisations. Where CAB district management structures already existed, or were put into place, ‘referrals’ of clients within the district was particularly straightforward.

There is still work to be done to understand why some equality or community organisations do refer cases to bureaux and others do not. Future work on discrimination advice will be able to draw on the project’s experience to provide bureaux with a much greater range of examples and potential strategies for effective community engagement.

### **Rural communities**

An important feature of the CAB national strategy for the provision of discrimination advice is that it should be equally accessible to people living in rural areas, as well as other people who face difficulties accessing advice services. The evaluation indicates that for people in rural areas to access advice services caseworkers need to provide a peripatetic service. There need to be good referral links with other bureaux. Bureaux also need to be creative and proactive in their approach to raise awareness amongst people in rural areas of their rights.

### **Objective 5: use local volunteers and local radio to increase awareness of the regulations**

To build the capacity of the organisation to respond to requests for interviews and to help bureaux to take up opportunities with local media, 29 bureau spokespeople and two regional Citizens Advice staff were given media training. The training was tailored toward employment discrimination and designed to equip participants with a range of skills for any type of media interview. A number of the seven project bureaux have used the skills learned for local news and radio interviews, although it was not possible to track outcomes for the wider group of bureaux that took part.

One delegate commented on the feedback form:

**“Simply superb – gives the confidence to deal with something terrifying!”**

## Partnerships

At the outset of the project, homophobic statements made by the leadership of the MCB led to concerns about the development of a national partnership between Citizens Advice and the MCB. These concerns centred on a conflict between the views expressed by the MCB and the principles of the CAB service, and the effect of any partnership on the CAB service's reputation and credibility with LGBT communities.

At a national level Faithwise and Citizens Advice have worked well together. The working partnership and communication between the two project managers has been valuable and effective.

Local relationships between the bureaux and the MCB/Faithwise beacon centres have been more problematic. This is due, in part, to a mismatch between MCB/Faithwise beacon centres' targets and CAB targets. The beacon centres were tasked with holding a specific number of outreach sessions, which were to be run by the bureaux. Bureaux' agreements however did not have matching targets. Co-ordination to ensure that local agreements better facilitate partnership working will be built into future programmes

Where the bureaux and beacon centres came to agreement early the partnership worked well. For example, Newport CAB and the Cardiff beacon centre have a very successful partnership, their outreach activities worked well and they held joint training sessions for local organisations.

In some cases, it took time for the relationship and trust between bureaux and beacon centres to develop. Developing the relationships has involved significant investment of effort.

Bradford partnership learnt that simply advertising outreach session is not enough to generate interest. Other methods of reaching and engaging people needed to be used. The Bradford beacon centre advertised outreach sessions without effect. In Barking and Dagenham, both an appointment system and a fortnightly open advice session at the East London Mosque were tried, but did not attract clients with discrimination cases.

In some cases, bureaux highlighted the limits inherent in working with particular beacon centres in reaching out to all members of the local Muslim community: for example, to women, or to Muslims worshipping at other locations.

### The Religion and Belief Reference Group

Over the course of the project the reference group met three times and it also provided input via email on the development of training materials for advice session supervisors and employment specialists. The Specialist Support Team found it

particularly useful to have the reference group to talk through issues, check materials and to access information, identify scenarios and contacts. Some members of the reference group felt that Training Services could have made more use of their support.

The reference group were also used to provide contacts in the seven geographic areas in which the pilot bureaux were located. These introductions enabled the bureaux to establish relationships and begin raising awareness of the SORB regulations within those religious communities.

Overall this was a productive relationship for both the reference group and the Citizens Advice team, and there is a desire to keep the group in place and further develop its work.

## Additional benefits

### Provide public information

#### Adviceguide

[www.adviceguide.org.uk](http://www.adviceguide.org.uk) is the Citizens Advice public information website. As an unfunded part of the Majority Matters project we set up a new discrimination section and updated the SORB information, including factsheets on employment discrimination. Between April 2006 and Feb 2007 3,328 people used the SORB factsheets, as shown in the table below:

Unfair treatment at work	Apr 06	May 06	Jun-06	Jul-06	Aug-06	Sep-06	Oct-06	Nov-06	Dec-06	Jan-07	Feb-07
religion	167	154	106	99	144	156	168	133	130	134	134
sexual orientation	202	185	150	114	176	146	199	165	133	177	177

#### Telephone advice

Q Call is a 24 hour pre-recorded information service that enables bureaux to answer more telephone enquiries. In the first instance callers are put through to a telephone adviser in the bureau. If lines are engaged or unanswered the Q Call system intercepts the call. The system was updated to include information on both the Age and SORB regulations. The content of the pre-recorded messages is checked and quality-assured by the Citizens Advice Information Department. The messages are professionally recorded to make them as user-friendly as possible. There are currently 210 bureaux using Q Call.

Below is a sample of twenty of the bureaux using the service and the number of enquiries on sexual orientation and religious discrimination between April 2006 and March 2007. As would be expected the bureaux with the highest number of enquiries to the service are in larger towns and cities.

Bureau	Sexual Orientation	Religion
Aylesbury	2	5
Bath	3	3
Bristol	7	8
Blackpool	13	6

Camden	12	19
Chester	1	1
Dover	3	1
Hackney	7	6
High		
Wycombe	6	3
Keighley	4	0
Kirklees	10	12
Leeds	12	11
Liverpool	2	2
Manchester	6	11
North		
Tyneside	4	1
Sherborne	0	0
Westminster	18	8
Woking	4	2
Ynys Mon	1	2
York	4	2
<b>Total</b>	<b>119</b>	<b>103</b>

## Budget

The table below shows the predicted expenditure against actual expenditure set out by project milestones.

Milestone number	Original milestone	Month	Amount	Actual
1	Project coordinator recruited	Nov-05	46,736	46,736
2	Project Board established	Nov-05	1,791	1,791
3	Two specialist support officers in place	Nov-05	101,117	101,117
4	Casework management staff assigned	Nov-05	25,044	25,044
5	Reference groups established - SO and RB reps	Dec-05	11,940	7,940
6	TDT staff allocated	Dec-05	17,910	17,910
	<b>Subtotal Q1 Oct - Dec 2005</b>		<b>204,538</b>	<b>200,538</b>
7	Development and delivery of casework management system	Mar-06	5,572	5,572
8	Coordinator travel (project set up)	Mar-06	1,194	1,194
9	Supporting legal texts provided	Mar-06	11,940	11,940
10	Discrimination network groups held y1	Mar-06	2,985	2,985
11	Participating bureaux identified and five grants made	Mar-06	208,950	208,950
12	Volunteer and SORB promotional material produced	Mar-06	2,627	2,627
13	Volunteer buddy system set up	Mar-06	7,164	7,164
14	Training pack material developed	Mar-06	3,582	3,582
15	Training packs printed & available	Mar-06	3,582	3,582
16	Skills course developed	Mar-06	3,582	7,582
17	Skills course material ready	Mar-06	4,776	4,776
18	Courses arranged and promoted	Mar-06	2,388	2,388
	<b>Subtotal Q2 Jan - Mar 2006</b>		<b>258,342</b>	<b>262,342</b>
19	Media training to advisers	Jun-06	8,358	3,558
	<b>Subtotal Q3 Apr - Jun 2006</b>		<b>8,358</b>	<b>3,558</b>
20	15 skills courses delivered	Mar-07	21,462	26,262
21	Coordinator travel (evaluation)	Mar-07	500	500
22	Discrimination network groups held y2	Mar-07	2,500	2,500
23	Casework management system refinement	Mar-07	31,294	31,294
24	50 Employment advisers trained	Mar-07	2,524	2,524
	<b>Subtotal Q6 Jan - Mar 2007</b>		<b>58,280</b>	<b>63,080</b>
	<b>Total</b>		<b>529,518</b>	<b>529,518</b>

**Milestone 5:** payment for consultation on religious issues used in the development of the training programme for advice session supervisors came from the allocated budget for the religion and belief reference group

**Milestone 19:** money was also saved from the media training by using a Citizens Advice venue on all three occasions. The money saved was also invested in the development of the training programme.

**Milestone 24:** the original plan was for 50 employment advisers to be given further training on discrimination in employment online. Online training modules were developed which enabled more employment advisers to access this training opportunity.

## Long term benefits

The project has been a catalyst for the Specialist Support Team to consider targeted training, including provision of online access for sustainability and offering courses externally for other advice agencies to contribute to capacity building in the advice sector. They have recognised the value of partnership working and increased understanding between organisations.

The relationship with the reference group will continue. The reference group members are all keen to continue and have expressed a wish to spend sometime observing in a bureau. Citizens Advice will arrange for the group members to visit one of the SORB project bureaux. This relationship will continue to be important to the work of Citizens Advice.

Relationships such as between the members of the reference group and with other partners on the project (Faithwise, MCB, and Acas) will help develop a body of learning and expertise to inform the set-up and focus of the EHRC.

The accredited programme developed by Specialist Support will benefit other advice agencies and help to provide career development for committed employment advisers thus ensuring lasting improvements in the availability of equality and discrimination advice skills to the advice sector.

All of the project bureaux have agreed to continue the work on SORB for at least an additional six months. Two of the bureaux are funded under the original round until September 2007. All of the pilot bureaux are keen to build on the momentum this project has established. They have begun to see the beneficial effect of the extensive awareness raising work with more advice work in this area emerging. Working with community groups as well as local councils, police forces and organisations to talk about the project and set up referral networks has ensured that there is greater awareness of bureaux as a source of advice and help on discrimination. It is crucial that this valuable service continues and is extended to be available to more members of the public.

Clients access to justice and changes in employer's behaviour are important project outcomes. There were challenges in identifying and recording these in the project. However, some of the case studies demonstrate these wider impacts. Future work should aim to record these where possible.

Our casework management toolkit is a set of legal and procedural guides. The toolkit has been designed to reflect the fact that much the same principles and procedures apply in England, Scotland and Wales. It contains information on interviewing, good case management and identifying discrimination as well as all aspects of running a tribunal claim on discrimination, and detailed information about precedents and examples. It is subject to regular revision and it has been improved, expanded and updated from the original 9 guides to 15. It has also been expanded to cover age discrimination. The aim is to continue to maintain and improve the system.

## Learning and recommendations

### Networking

Geographical location, time constraints and workload made it difficult for the caseworkers to network with each other with any regularity. Although an online forum was set up to provide a virtual space for discussion and sharing information, most effective networking happened when the whole group met at workshops. These were organised by the national project manager at the mid and end-points of the project.

The solution may be to have more networking sessions where everybody gets together face to face, ideally from the start of the project, although as the caseworkers started at different times, this could prove difficult. An alternative way of sharing experience would be to increase the level of contact between the project management team and individual bureaux, enabling the collection of case studies and examples of good practice that could then be shared with all caseworkers.

### Communications

Internal communication needs to be increased. More channels need to be identified for publicising the project to all bureaux, e.g. the Citizens Advice strategic bureaux manager's forum.

### Community sensitivities

One bureau found that the local LGBT group would not attend a SORB seminar which also included the participation of certain religion and belief communities as they felt there would be tensions. Equally the identity of the caseworker can affect the profile of the clients that use the service. Care and consideration needs to be given to the fact that approaching or appearing to be aligned to one group may alienate others.

### Extending training

In the future extending the availability of diversity training will help with general employee awareness within bureau and better support volunteers and specialists.

### Commitment

There is a strong desire by CAB to maintain the momentum that this project has established; working to continuing to increase confidence levels, and increase the numbers of cases dealt with.

## Social policy

The evaluation found that more could have been done to support and build on the potential for the project to influence local social policy.

## Reporting and monitoring

Reporting and monitoring emerged as a challenge during the programme. More could have been done by bureaux to report in a timely way, and in line with agreed formats. Citizens Advice needs to do more to engage bureaux in developing a workable reporting format, to harmonise reporting requirements across projects, and to ensure bureau managers are accountable for key project deliverables.

A Memorandum of Understanding should be agreed between Citizens Advice and national partners to clarify expectations. The expected outputs from bureaux and the partnership organisations to be worked with need to be negotiated with individual bureau and included in Service Level Agreements.

The Equal Opportunities Committee of the Citizens Advice Trustee Board have an important role to play. Where Citizens Advice plans to develop partnerships at national level, it should draw more widely on the views of bureau managers to help identify the opportunities and challenges that may be presented at a local level partnership level.

Bureaux need more discretion in deciding how to best use scarce resources to achieve agreed outcomes within their local community.

Realistic expectations of the number of substantive partnerships bureaux can build are needed. Working with and supporting fragile organisations or networks can be key to reaching under-served communities, but is time-intensive and does not always produce results if an organisation loses funding from elsewhere or a network stops working.

Bureaux would like an approach that enables them to identify which client groups have unmet needs for discrimination advice, and develop the partnerships they feel are necessary to address this. This more flexible approach would be balanced with clear targets, and active monitoring of outcomes.

## Partnership working

The SORB course for advice session supervisors was unusual in that it brought together external partners to facilitate alongside the in-house tutors. All the delegates welcomed the opportunity to discuss correct terminology and to explore case studies in depth with the external facilitators from the Village CAB and Faithwise. However, providing in-depth training with high quality external inputs came at a relatively high cost per trainee: our view is that this was justified, but future programmes will need to

consider the right balance between the depth of the training provided and widening access for trainees and bureaux. One change proposed by delegates was offering the two-day course split over two days, reducing the impact of the training on bureau workloads. Future courses will also need to ensure coverage of different strands, while focusing on concepts and issues where training needs are greatest.

The project has enabled the Specialist Support Team to pilot ways of targeting future training on discrimination and inform its future development. Emerging priorities for the team include continuing to develop online models for sustainability and offering courses externally for other advice agencies, and creating partnership working and increasing understanding and connections between organisations.

## The Age project

This section discusses what was undertaken, the outputs, impacts and learning for each objectives of the Age project.

### Objective 1: train generalist and specialist advisers

#### Activities

One of the aims of the Age project was to ensure that advisers in bureaux were able to identify and advise on cases of age discrimination. In order to do this we developed a course to give bureau guidance tutors the skills and tools they would need to teach the advisers in their bureau about the age regulations and clients' rights.

The course was designed for guidance tutors. Guidance tutors work with all new generalist advisers and tend to be longer serving members of the Citizens Advice service and so it was felt that the best return on investment could be made by targeting them as a group.

30 courses ran at venues in England and Wales achieving a good geographic spread of delegates with 259 guidance tutors were trained. Regional spread can be seen in the table below.

Regions and Wales	Age
East	35
London	46
Midlands	59
North	26
North West	19
South East	44
South West	21
Wales	9
<b>Total booked</b>	<b>259</b>

## Impacts

Comments from the feedback forms include:

“It has given me a good overview of the new legislation and how it may affect some of our clients”

“Useful session, both for advice and for ensuring our own employment contracts are ok”

“Case was well planned – tutor had good background knowledge and kept the course on track”

“Should be straightforward to pass on to bureau”

To complement the training for guidance tutors, an online training tool has been provided to bureaux. The software, created by Kineo, is being used in bureau to facilitate discussion on the age regulations and to help advisers to work through client related scenarios.

Comments received from people who have used this software include:

“I found it an excellent way to introduce individuals to Age equality who were unable to attend the internal training session”

“Virtually all the volunteers in the bureau used the programme and found it excellent (and enjoyable)”

“Practically all advisers at Otley managed to do the training and enjoyed it”

“More training along this line would be very helpful”

## Objective 2: reinforce the information systems that advisers draw from

### Activities and outputs

Citizens Advice electronic information system, AdviserNet, is used by trained Generalist Advisers in all bureaux and 700 other advice agencies. It has been expanded to give guidance on the Age regulations. In May 2006, information was added informing advisers about the new Age regulations, what they would cover and how they might apply to clients. All employment rights information has been updated to include the Age regulations.

The CAB service online management resource for bureau managers Bureau Management Information System (BMIS) has been expanded with guidance for bureau managers on the implications of the new Age regulations for bureau management, and links to The Age and Employment Network (TAEN) resources.

The revision of the employment casework toolkit has been completed (see SORB sections above) and includes up-to-date information for caseworkers on age discrimination. A guide to completing initial questionnaires on age discrimination cases for employment tribunals has been written by Tamara Lewis from the London Law Centre. Citizens Advice will fund the distribution of the guide to bureaux.

### Impacts

Not only has the new employment casework toolkit been of value as a new information advice tool for discrimination in employment advice, it has also allowed the development of a toolkit model that is transferable. Citizens Advice is now exploring the possibility of applying the model to Money Advice. The project funding has therefore facilitated a development that will have much wider benefits.

## Objective 3: provide second tier specialist support on age discrimination

### Activity and output

A web-based consultancy enquiry system for second tier age discrimination advice has been piloted. It provides expert advice on casework queries and is available, free of charge to any advice agencies. Many agencies including advice<sup>UK</sup>, Age Concern and Law Centres are signed up for use of the system.

### Impact

We have received 46 age discrimination enquiries so far; six of which came from external agencies.

## Additional benefits

### Provide high quality information to the public on age discrimination

#### Advice on the internet

The Adviceguide website gives the public advice on a wide range of issues. In this, unfunded, element of the age discrimination project, the range of factsheets available on Adviceguide has been expanded to include one on the age regulations. Employment information has been amended with an enhanced profile for age discrimination issues. The website also contains a link to the TAEN Age Busters website.

The table below shows 1296 members of the public accessed age discrimination factsheets in the 5 month after the regulations came into effect.

Oct-06	Nov-06	Dec-06	Jan-07	Feb-07	Total
598	269	163	266	266	<b>1296</b>

#### Advice by phone

Q Call is a 24 hour pre-recorded information service that enables bureaux to ensure that all incoming calls are answered (described in more detail in the SORB section). Below is a sample of the bureaux using the Q Call service and the number of enquiries on age discrimination April 2006 and March 2007.

Bureau	Age discrimination enquiries on Q call
Aylesbury	4
Bath	2
Bristol	9
Blackpool	11
Camden	8
Chester	2
Dover	0
Hackney	9
High Wycombe	6
Keighley	2
Kirklees	11
Leeds	5
Liverpool	2

Manchester	4
North Tyneside	1
Sherborne	0
Westminster	10
Woking	2
Ynys Mon	1
York	2
<b>Total</b>	<b>91</b>

### Raising public awareness

The Citizens Advice press office has provided an “advice column” for bureaux to use to raise awareness with the local press. Several bureaux have been successful in getting this into their local papers. The media team also developed “10 top tips” for bureaux to use for more coverage.

## The Age and Advice Network

The organisations that were funded under this project have formed a partnership working group called the Age and Advice Network (AAN). The network meets every three months to discuss progress, ideas and future partnership working. The network has provided a forum for sharing materials. Citizens Advice regularly attends and has disseminated information from Help the Aged, Age Concern and Law Centres Federation to all bureaux. The group is hosted by Help the Aged and funded by the EU and will continue to run for 12 months.

## Partnerships

TAEN have provided consultancy support to develop the knowledge content of information, training and media materials. This has included case studies, technical information about the regulations and has also helped with quality control of materials once written and edited. TAEN also contributed information for bureau managers and trustees explaining the implications of the regulations for them as employers. This information has been added to the Citizens Advice BMIS.

As agreed with Citizens Advice Scotland, all training and public information materials produced have been appropriate for use in Scotland, and have been disseminated by Citizens Advice Scotland.

## Budget

The table below show the overall budget expenditure. It illustrates the predicted expenditure against actual expenditure for each project milestone.

Milestone number	Milestone	Amount	Actual
<b>Project set-up and governance</b>			
1	Project manager	9,620	9,620
2	Project Board meetings	0	0
3	Project manager travel	1,253	1,253
4	SSU Direct Management	2,818	2,818
5	Recruitment	2,505	2,505
	<b>Subtotal</b>	<b>16,195</b>	<b>16,195</b>
<b>Generalist Advisers Capability</b>			
6	Development and production of training materials - workers meetings	8,768	8,768
7	Delivery of training to in-bureau tutors	26,301	26,301
8	Update existing generic employment training materials	12,525	12,525
9	Develop age discrimination distance learning materials	11,899	6,899
	Source externally developed online package	0	5000
11	Training management costs	2,505	2,505
12	Update AdviserNet	31,313	31,313
13	Contract writers and checkers	0	0
	<b>Subtotal</b>	<b>93,311</b>	<b>93,311</b>
<b>Specialist Employment Advisers Capability</b>			
14	Develop and deliver casework training and development programme	20,773	20,773
15	Casework management system -develop and maintain age content	16,539	16,539
16	Second tier casework advice - set up and pilot email service	20,772	20,772
17	Contract writers and checkers	0	0
18	Library, subscriptions	1,253	1,253
19	Tamara Lewis guide	2,505	2,505
20	Info travel	626	626
21	Specialist Support travel	1,879	1,879
	<b>Subtotal</b>	<b>64,347</b>	<b>64,347</b>
	<b>Total</b>	<b>173,854</b>	<b>173,854</b>

Some of the money allocated to the development of an online training package for bureaux (£5,000 of £11,800) was used to buy in a package which was developed by Kineo. This proved to be a cost effective way of providing a basic package with access for the whole service. The remainder of the allocated money was used to develop further online modules on age discrimination.

## Learning

A number of organisations who have a strong commitment to the success of the Age regulations have worked closely on applications for DTI transitional funds. Citizens Advice, Age Concern, Law Centres, Youth Access, DIAL UK, advice<sup>UK</sup> partnership, CAS, TAEN and NIACE were all involved in taking this work forward. Working in partnership avoids duplication of effort at regional and local level. However, partners agreed that to achieve maximum coverage and impact it was necessary for each organisation to run training events and seminars tailored to the learning needs of their respective audiences.

These NGO's and charities worked together to ensure that maximum value was achieved through regular meetings where they were able to share knowledge and materials.

## Appendices 1 SORB: evaluation summary of actions

e = evaluation, m = monitor

Objective	Indicators	Status
<p>Objective 1 To build advice session supervisor (ASS) capacity to ensure that generalist advisers have increased knowledge, confidence and appropriate skills to identify and advice on discrimination.</p>	<ul style="list-style-type: none"> <li>• Training course on Employment Equality developed for ASSs.</li> <li>• 150 ASSs trained to identify employment discrimination</li> <li>• ASSs share information with generalists</li> <li>• Increase in the number of employment discrimination identified by generalist advisers nationally as recorded on CASE (electronic enquiry recording system)</li> </ul>	<p>m Training course developed in consultation with MCB and Village CAB</p> <p>m 163 ASSs trained</p> <p>e 17 of the 18 delegates questioned said they would be better able to help advisers to identify discrimination</p> <p>e The number of SORB cases reported via CASE has risen by 17 per cent - SO and 9 per cent RB</p>
<p>Objective 2 Build specialist employment adviser capacity</p> <p>Specialist employment advisers have greater capacity to provide discrimination advice and casework.</p>	<ul style="list-style-type: none"> <li>• Specialist Support officer recruited and inducted</li> <li>• 25 specialist employment advisers trained in discrimination casework advice</li> <li>• 25 specialist employment advisers receive further professional development</li> </ul>	<p>m Completed</p> <p>m Completed</p> <p>m It was decided that developing a longer-term sustainable way to develop these skills would have more long term benefit. Therefore we</p>

	<ul style="list-style-type: none"> <li>• 5 discrimination network groups held</li> <li>• increase by 20 per cent on 2004/5 discrimination claims via second tier consultancy.</li> <li>• Guides extended to Scotland</li> <li>• Guides meet quality control level of Citizens Advice Information Dept.</li> <li>• More user and more frequent use of the on-line forum</li> </ul>	<p>m</p> <p>e</p> <p>m</p> <p>m</p> <p>e</p>	<p>developed a training programme which is accredited by Wolverhampton University.</p> <p>Completed</p> <p>2005 = 518 2006 = 622 (18 per cent increase).</p> <p>Completed</p> <p>Checked and quality met</p> <p>There has been a 50 per cent increase in the number of users on the forum in 2007</p>
<p>Objective 3</p> <p>Build towards and pilot methodologies for regional expertise</p> <p>A clear model of what arrangements work for different bureau situations and different communities.</p>	<ul style="list-style-type: none"> <li>• Transparent , fair process for making grants to bureaux set up and followed</li> <li>• Number of new matter starts</li> <li>• Outreach sessions delivered to the community through local partnerships</li> </ul>	<p>m</p> <p>e</p> <p>m</p>	<p>Completed</p> <p>Total of 39 SORB cases seen by project bureau (26 SO and 13 RB) 224 discrimination cases altogether</p> <p>All project bureaux have delivered a number of training and outreach sessions through local community partnerships</p>

	<ul style="list-style-type: none"> <li>• Number of local bureau partnerships established with religion and belief groups and LGB organisations.</li> <li>• Number of volunteers from minority religion and belief and LGBT communities recruited in these bureaux</li> </ul>	<p>m</p> <p>e</p>	<p>Between them the project bureaux have delivered over 50 session giving advice or awareness raising to local SORB communities.</p> <p>None recruited but in the pipeline for most of the project bureaux</p>
<p>Objective 4 Raise awareness of the regulations in “hard to reach” religion and belief and LGBT communities</p> <p>and Objective 5</p> <p>Use local volunteers and local radio to raise awareness of the regulations.</p>	<p>Project bureau reporting use if project promotional materials</p> <p>Range and number of external agencies’ complementary materials disseminated</p> <p>Number of bureau workers media trained local radio</p> <p>Number of visits to SORB factsheets on Adviceguide</p>	<p>m</p> <p>m</p> <p>m</p> <p>e</p>	<p>Volunteer recruitment leaflets used by all project bureaux and also sent to bureaux in each region with a strong equality lead.</p> <p>All bureaux received a copy of the Leeds Animation Workshop DVD and each project bureau received a copy of the LCF DVD</p> <p>31 bureau spokespeople were trained on broadcast media interviews.</p> <p>Nearly 200 – 300 visits per month to SORB factsheets Max no. visits: SO – 202 April 06 RB – 168 Oct 06</p>

	Number of radio interviews/phone-ins participated in.	e	Two of the project caseworkers have given radio interviews on the SORB regulations
Citizens Advice, partners and the EHRC will be better informed about the needs and expectations of older and younger people in respect of age discrimination	record numbers and geographic spread of training participants, and analyse participants' evaluation	m	Numbers and geographic spread in table in main text – section 5.1

## Appendices 2 Age: evaluation summary of actions

e = evaluation, m = monitor

Objective	Indicators		Status
<p>Objective 1</p> <p>Train generalist and bureau guidance tutors</p>	<ul style="list-style-type: none"> <li>• On-line training materials published</li> <li>• Number of bureaux signed up to use the software</li> <li>• Satisfaction of the users</li> <li>• 30 sessions held and 360 in-bureau tutors trained</li> <li>• Feedback (satisfaction levels) from the courses</li> </ul>	<p>m</p> <p>e</p> <p>e</p> <p>m</p> <p>e</p>	<p>Software bought from Kineo</p> <p>Over 150 users have signed up for the Kineo software which is still available so the number is increasing all the time</p> <p>Online survey results</p> <p>These sessions where held. 259 in-bureau tutors trained. Lower number due to cost confusion</p> <p>Online survey results</p>

<p>Objective 2</p> <p>Reinforce the information systems that advisers draw their information from</p>	<ul style="list-style-type: none"> <li>• AdviserNet updated and disseminated to 1,175 organisations</li> <li>• Casework Management System – age elements published</li> <li>• Questionnaire guide published</li> </ul>	<p>m</p> <p>m</p> <p>m</p>	<p>Completed</p> <p>Completed</p> <p>Written by Tamara Lewis from London Law Centre – Licence bought for use in all bureaux.</p>
<p>Objective 3</p> <p>Provide 2<sup>nd</sup> tier specialist support on age discrimination in employment</p>	<ul style="list-style-type: none"> <li>• 2<sup>nd</sup> tier support service launched</li> <li>• Number of enquiries (internal and external)</li> </ul>	<p>m</p> <p>m</p>	<p>Service launched in October 07</p> <p>46 enquiries received. 40 from bureaux and 6 from external agencies.</p>
<p>Objective 4 (not funded)</p> <p>Provide high quality information to the public on age discrimination on employment.</p>	<ul style="list-style-type: none"> <li>• Factsheet data published (English and Welsh)</li> <li>• National press release and local media tools for bureaux.</li> </ul>	<p>m</p> <p>m</p>	<p>Completed</p> <p>Press releases written for bureau to use and available on Intranet.</p>
<b>Long Term Benefits</b>			
<p>Individuals will know what their rights are in relation to age discrimination in employment.</p> <p>Where possible, individuals will be able to help themselves take action to make</p>	<ul style="list-style-type: none"> <li>• identify number of visits to age discrimination information in the Adviceguide public website.</li> </ul>	<p>m</p>	<p>The age information had 598 visits in the first month (Oct 07). Apart from December the figure has consistently been over 260 per month.</p>

use of their rights			
Individuals will know where to seek information and advice on those rights.	<ul style="list-style-type: none"> <li>record how many people seek information on age employment discrimination from Qcall</li> <li>analyse national and trade media coverage gained</li> </ul>	<p>m</p> <p>m</p>	<p>A sample of bureaux using Qcall have been analysed and information included in section 12 of the main report text.</p> <p>8 articles printed in the regional press in the two months preceding the regulations: 3 in South East; 3 in Midlands and 1 in South West</p>
Advisers will be able to advise and take action on behalf of individuals in respect of age discrimination, including at generalist and casework levels	<ul style="list-style-type: none"> <li>record numbers of partners' information materials disseminated via bureau networks</li> </ul>	m	Information from Help the Aged; Age Concern; London law Centre sent to bureaux via mid month packs
Citizens Advice, partners and the EHRC will be better informed about the needs and expectations of older and younger people in respect of age discrimination	<ul style="list-style-type: none"> <li>record how many people, and of what age, gender, ethnicity and disability status seek advice on age employment discrimination from bureaux</li> <li>record numbers and geographic spread of training participants, and analyse participants' evaluation</li> </ul>	<p>m</p> <p>m</p>	<p>Of 2,200 enquiries 72 per cent white, 60 per cent female, 49 per cent female. More detailed information will be made available on application.</p> <p>Numbers and geographic spread in table in main text – section 11.1</p>

## Appendices 3a: HAID survey comments

How did you hear about this training?

manager

guidance tutor

Not sure - manager recommended

District training office

Guidance tutor forum

What did you find most useful about the course and why?

Access to people to ask direct questions re: terminology etc.

Good post course follow up

Case studies and examples

Practical examples and everyday scenarios

Basic level - not much prior knowledge needed

Knowledgeable tutors - able to ask sensitive questions

Learning the correct terminology

Tips for use in the bureau - things to look out for

Lots of food for thought - things I'd never thought of before.

Case studies and unusual scenarios

Raising awareness raising in the workplace

Generally very informative

Ability to ask direct questions and good follow-up if answers not known at the time

info on the religious aspects plus info on other websites (BBC)

Info on religion and belief discrimination e.g. that atheists also are covered. Plus the clarification of terminology

Interesting and the employment info

Pulled together what is meant by discrimination. Lots of tips for back in bureau

Being made aware that problems exist and what to look out for

What did you find least useful and why?

Focus on religion and sexuality

2 days not together meant 2 lots of travelling and expenses

nothing

Could do with more time to discuss personal experiences

It would have been useful to have had handouts on "common" religion and beliefs

Timing but for personal reasons

Not much opportunity to find out the experiences of other bureau which is always useful.

nothing

Nothing

pre-course information. Was unsure what to expect from the course

Nothing

Nothing

Could have covered more forms of discrimination e.g. disability or be made clearer in pre-course info

Not broad enough ( SO and RB)

Nothing

2 days, too long

Nothing

Nothing

What would have made the course better for you?

more general discrimination covered

2 days together

nothing

more discussion time

<input type="checkbox"/>	more discussion time
<input type="checkbox"/>	nothing
<input type="checkbox"/>	wider remit - covering more strands of discrimination
<input type="checkbox"/>	More networking/discussion time
<input type="checkbox"/>	Nothing
<input type="checkbox"/>	More choice of dates
<input type="checkbox"/>	Wider/broader discrimination issues
<input type="checkbox"/>	Too long ago to remember
<input type="checkbox"/>	Nothing
<input type="checkbox"/>	clearer limitations on scope
<input type="checkbox"/>	A basic knowledge of the subject before the course (info put on CABlink?)
<input type="checkbox"/>	two days together would have been preferable
<input type="checkbox"/>	Nothing new - should not have attended
<input type="checkbox"/>	Nothing - well presented. The tutor contacted with answers after the course.
<input type="checkbox"/>	No Idea - wasn't looking forward to it but enjoyed it and was glad I attended.

## Appendices 3b: HAID stats

### Majority Matters Evaluation - HAID Survey

#### How did you hear about this training

	Response Total
CABlink	1
Flyer on skills for ASS course	4
Regional mailing	7
Word of mouth	1
Other (please specify)	5
Total Respondents	18
(skipped this question)	0

#### Do you think it was beneficial to hear directly from trainers from communities that are likely to experience discrimination and to be able to ask them questions on the first day of the course?

	Response Total
Lots of benefit	16
Some Benefit	2
No Benefit	0
The session was detrimental	0
Total Respondents	18
(skipped this question)	0

#### Please say yes or no to all the words that you feel describe how you found this

	Yes	No	Response Total
Interesting	18	0	18
Confusing	0	18	18
Relevant	18	0	18
Challenging	11	7	18
Irrelevant	0	18	18
Useful	17	1	18
Total Respondents	18		
(skipped this question)	0		

**Do you feel this course enables you to better identify client issues as discrimination?**

	Response
	Total
yes	17
no	1
Total Respondents	18
(skipped this question)	0

**Do you feel more confident in supporting an adviser in identifying client issues as discrimination?**

	Response
	Total
Yes	18
No	0
Total Respondents	18
(skipped this question)	0

**Do you think the number of discrimination cases recorded in your bureau have increased / will increase as a result of the course?**

	Response
	Total
Yes	10
No	8
Total Respondents	18
(skipped this question)	0

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