

Guidance for using the bureaux activities spreadsheet

This spreadsheet contains general information about the financial capability activity of bureaux who are actively involved in this area of work.

The database contains information from the Financial Capability survey, as recorded by bureaux. **The information was collected between May and June 2011. Please note that information is not automatically updated.**

Please note that some data is not available against particular bureau records either due to permissions or data not being made available to us in full.

Using the spreadsheet

To use the database, right click on the link and choose 'Save target as'. Save the spreadsheet to your computer or network then open from that location.

You will be presented with all bureau data. Bureaux are listed alphabetically in each section of the spreadsheet. The information is separated into the following sections, with each section appearing on it's own tab along the bottom of the database.

Summary

Bureau name

Financial capability forum area

County

Direct work with adult end users (yes or no)

Work with frontline workers (yes or no)

Work with schools (yes or no)

Bureaux that have particular experience of working with different client groups and are willing to be contacted

Detail

Bureau name

Financial capability forum area

County

Delivery methods

End user target groups

Non-mainstream topics delivered to adults and frontline workers

Frontline worker client groups

School age groups

Number of paid staff involved

Amount of time dedicated to financial capability per month

Number of volunteers involved

Contacts

Bureau name

Key contact for financial capability

Job title

Email address

Bureaux that have particular experience of working with different client groups and are willing to be contacted (repeated from summary sheet)

How to use the filters

The database has a filter applied so that it can allow the data to be interrogated. For example, if you would like to find out which bureaux are reaching mental health service users in the South East England forum area, you would go to the relevant tabbed section (in this case 'Detail') click on the arrow below the heading 'Forum area', select South East England and then scroll along to the heading 'End user target groups', click on the arrow below the title 'Mental health problems' and select 'Y'.

To return the filtered information in each column back to it's original state, click on the arrow beneath each filtered heading and select 'All' or alternatively on your tool bar, select 'data' then 'filter' and finally 'show all'.

If you would like to search on more than one item that is in the same column e.g. using the previous example, you want to find which bureaux are reaching mental health service users in both South East England forum area **and** East England forum area, use the same method as before except when clicking on the arrow below the heading 'Forum area', select 'custom'. You will be presented with a small box. Make sure that the top left-hand drop down box shows 'equals' then select South East England from the drop down box next to it. Click 'Or', then select 'equals' from the bottom left-hand down box then select East England from the drop down box next to it. Click OK.

If you have any queries relating to the use of the spreadsheet or the information it contains, please contact david.mahon@citizensadvice.org.uk