



Research Series

# The Information Process In Citizens Information Centres

Analysis and Assessment

*information for all*

# The Information Process in Citizens Information Centres

Analysis and Assessment

COMHAIRLE

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Nua Research Services

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# Preface

Comhairle has the statutory function of promoting and supporting the development of independent information, advice and advocacy services throughout the country. Under its current Strategic Plan<sup>1</sup>, the agency is committed to supporting the continued development of Citizens Information Services through appropriate funding and through developing and promoting quality standards in relation to the delivery of information, advice and advocacy services. It also aims to contribute to the policy-making process by identifying and bringing to the attention of the relevant authorities the feedback of citizens and information providers in relation to the operation of social services. In order to achieve these objectives Comhairle supports a nation wide network of 85 Citizens Information Centres (CICs). These centres dealt with 313,000 queries from the public during 2000. In order to carry out its task effectively and to contribute to the development of policy in the sector, Comhairle reviews the nature and extent of services provided by CICs on an ongoing basis.

The present report is based on a study of the actual information exchange process in CICs. The research focused on the nature and quality of the information provided, including the provision of advice, referral and advocacy and the extent to which gaps in service provision based on the experience of the users of services are identified and highlighted. The study also examined the extent to which the approach taken promoted the concept of developing the information capability of citizens. This refers to the ability of people to identify their needs, negotiate appropriate provision to meet those needs and, where relevant, highlight gaps in the availability of services.

Comhairle is committed to the development of a strong independent information sector which engages with the actual life situations of individuals, groups and communities. The information needs of people change and evolve as society becomes more complex and as people become more aware of their rights as citizens and become increasingly articulate in articulating these rights.

The issues identified in this Report are centrally relevant to the development of the independent information sector in general and to the functioning and development of CICs in particular. The need to target services at people disadvantaged under current methods of provision ( particularly people with disabilities), the creative use of information communications technology and the active engagement of citizens at all stages of the process are essential requirements in this regard. It is particularly important that resources are available to provide for adequate staffing and appropriate training and skill enhancement to ensure that a high quality and professional service is available.

One of Comhairle's key objectives is to ensure that information produced by the agency is of a high quality, timely, accurate and relevant and in this regard it aims to improve the quality and range of information on the services available for people with special needs, such as people with disabilities, older people, refugees and travellers.

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<sup>1</sup> See *Comhairle Strategy 2001-2003*, June 2001, Comhairle

The present study shows that there are many strengths in the CIC system and confirms the findings of other research that users are for the most part satisfied with the information provided and with the way their queries were processed. It was also apparent that users were being actively engaged in the process and were being encouraged to take initiatives on their own behalf thus reflecting an approach where information workers were enablers as well providers of information. Of particular interest was the finding that referral to other agencies was taking place regularly and that the CICs appeared to have established a *bona fide* relationship with statutory agencies.

Issues identified in the Report in respect of advocacy, social policy work and, in a relatively small number of instances, the quality of the information provided, have significant staffing and training implications which will be addressed by Comhairle as resources permit. While supporting the principle of providing full-time paid staff for all key CIC developments, Comhairle recognises the ongoing important role fulfilled by volunteers and strives to achieve an optimal balance between paid workers and volunteers in the CIC context.

While continuing to develop and enhance the service provided by CICs, Comhairle is also committed to developing telephone and web-based services, particularly OASIS, and to piloting other delivery systems during the period of its current strategic plan.

# 1 Background and Focus of Study

## 1.1. Introduction

One of Comhairle's<sup>2</sup> key strategic elements is the development of an independent information sector based on the concept of citizens' information. Comhairle is committed to the development of this sector by, inter alia, developing the network of Citizens Information Centres (CICs) around the country.

CICs are established, registered with and supported by Comhairle as a means of carrying out one of its statutory functions, viz., to promote and support the development of independent information, advice and advocacy services throughout the country. CICs, which were first established in 1974, are independent bodies with local boards of management, representative of a wide range of community interests and concerns. They are affiliated to Comhairle, from whom they receive funding, the Citizens Information Database, training and a back-up query facility. CICs are solely dedicated to the provision of information, advice and advocacy services. As part of their remit, CICs are encouraged and supported to engage in active social policy feedback to Government based on the experience of users.

CICs can be divided broadly into two categories - traditional CICs and key development CICs. Currently there are 37 CICs (out of a total of 86) included in the development category. The traditional CIC tends to have limited opening hours and to rely mainly on volunteers to provide the service. Development CICs are characterized by the deployment of paid staff, modern premises, relatively high levels of technology and a somewhat more developed organizational structures. All CICs have information workers whose function is to provide relevant information, interpret it when necessary and make representation on behalf of clients as appropriate. Comhairle is the main funding and registration body for CICs. In 2000 CICs throughout the country dealt with 313,000 queries from members of the public.

The following are the main principles set out by Comhairle for the establishment and operation of CICs. The service provided should be:

- comprehensive in scope, providing accurate, up to date information, advice and advocacy in relation to all social services;
- empowering, by enabling people to exercise their rights and responsibilities as citizens;
- free, confidential, impartial, non-judgmental, independent and non-directive;
- accessible to all people (using outreach, telephone and media as appropriate);
- a professional and caring service;

- focused on the needs of users and potential users;
- located in accessible and visually attractive centres;
- provide feedback and comment based on the experience of citizens and, thereby, contribute to the development of social policy, both locally and nationally.

The CIC model is being continually upgraded through building on existing strengths, including the community-based service, the ethos of impartiality and independence and the role of volunteers.

The general aim of the Comhairle CIC development process is to ensure that all citizens have easy access to good quality information, advice and advocacy services, provided in a variety of settings and using appropriate delivery methods based on local need and current technological developments. A particular goal is to work with others in the voluntary and statutory area to provide integrated service delivery in a 'one-stop shop' environment.

## 1.2. Information Provision in CICs

A primary resource for information providers in both the voluntary and statutory sectors is the Citizens Information Database (CID). Published by Comhairle, the CID is a comprehensive source of information on civil and social rights and entitlements in Ireland. The database currently contains over 1000 items of information classified and indexed in a variety of ways. The benefits of the system include its ability to search large volumes of information, frequent updating of information and a range of access and retrieval options.

Comhairle recognises the role that training plays in the delivery of quality information, advice and advocacy services, in the development of social policy feedback and in the support of voluntary organisations which deliver social services. A training programme<sup>3</sup> is provided which is available to people involved in organisations providing information to the public on social services and to those involved in managing voluntary organisations. Training courses/events are organised in various locations throughout the country and at different levels and cover a wide range of information provision topics, including courses for new information givers, disability awareness, advocacy, social policy work, money advice and strategic planning.

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<sup>3</sup> See Comhairle Training Programme 2001.

Other training resources which are provided by Comhairle include a Training Manual for New Information Givers, a 'How Can We Help You' video pack and a Good Practice Guide to Managing Volunteers. The Training Manual provides basic level training on a range of information topics such as social welfare, health, employment and taxation, as well as some elements on the delivery of an information service. The video, 'How Can We Help You', is designed as a training aid in developing effective interviewing skills for information givers. The *Managing Volunteers: A Good Practice Guide* provides guidelines on recruitment, training and support of volunteers.

### 1.3. The Information Exchange Process

Information provision in CICs operates along a continuum, ranging from the straightforward provision of information (oral or written) at one end to a more complex engagement with the life situations of citizens at the other end. The role of the information giver is to provide relevant information, interpret it when necessary and make representation on a client's behalf when necessary.

Other research provides general information on CICs -- categories of queries, the sources of information provided, the actions taken and the length of time taken to process queries (National Social Service Board, 1999; Browne, 1999, Comhairle, 2001). The purpose of the present study is to provide additional baseline data on the actual information exchange process in CICs, including the nature and extent of advice, referral, advocacy and social policy feedback and, also, the extent to which the concept of developing the information capability of citizens is included in the way information is provided.

The following research questions were identified at the outset:

- Is the information that is provided accurate, appropriate and adequate?
- Are all relevant options discussed and explored?
- What is the nature and extent of advocacy and representation on behalf of citizens?
- How does referral operate in practice?
- What is the nature and extent of contact with other agencies on the client's behalf?
- To what extent are gaps in service provision identified and channelled to the appropriate agencies?
- What is the nature and extent of call-back and follow-up procedures and how are these monitored?
- Are clients invited and encouraged to take action on their own behalf?
- Is there appropriate engagement with the client in respect of the actual overall circumstances of his/her situation?
- Are there procedures in place for dealing with people who have special needs (e.g., ethnic minorities, people with disabilities)?
- How do clients experience and view the process as a whole?

The study thus set out to:

- identify and analyse the practice in CICs in respect of these research questions;
- examine other models of citizens' information provision with particular reference to advocacy and representation;
- outline the implications of the study for (a) the provision of training and other support structures in CICs and (b) the functioning and development of CICs.

### Participating CICs

Comhairle identified the following criteria for selecting CICs to participate in the study:

- The study should be confined to key CICs (i.e. CICs providing a full-time service), that had been fully operational for at least a year;
- Some of the CICs included should have an active outreach service;
- At least one of the CICs should have a Legal Advice Service;
- The selected CICs should have indicated an interest in the study and a willingness to co-operate fully with the research;
- There should be CICs selected from each of the two existing NSSB regions (North and South) and an urban/rural mix.

It was noted that, while these criteria could not ensure total objectivity in terms of being representative, it was reasonable to argue that CICs selected according to these criteria were likely to broadly reflect the current and likely short-term future modus operandi in key CICs throughout the country.

The seven Centres which were selected on the basis of the above criteria were: two from a large Urban area, and one each from the West, South-West, South-East, Midlands and Border Counties.

Table 1 shows the numbers of queries dealt with by the 7 participating Centres in 1999 and indicates that the number of queries processed ranged from 2,600 to 21,000 (average 8,214). While queries to all 7 Centres were primarily either personal or telephone calls (letters, faxes and email accounted for a only a small minority of queries), it was decided that the study would focus exclusively on queries from personal callers.

TABLE 1: QUERY NUMBERS IN PARTICIPATING CICS, 1999

CENTRE 1	21,000
CENTRE 2	2,600
CENTRE 3	5,600
CENTRE 4	10,800
CENTRE 5	5,900
CENTRE 6	7,000
CENTRE 7	4,600

The fieldwork for the study was carried out during the period March to May 2000 with a researcher spending four days in each of the 7 study locations. This included observation of the information exchange process, assessment of the process by both information givers and clients, discussions with information givers and interviews with managers. The study methodology is set out in full in an Appendix.

## 2 Different Models of Citizens Information and Advice Provision

### 2.1. Introduction

Within complex societies, the Government is probably the biggest collector, processor and custodian of information of any sector of society. Examples of government held information are as diverse as economic and demographic data, audited accounts, personal data and information on benefits and entitlements (Hirst and Norton, 1998). In the past, governments were required to supply and disseminate certain categories of information such as performance and environmental indicators. Other categories of information, such as health and safety advice, and information on entitlements, which they were not required to disseminate, were dispersed in a more piecemeal, random fashion.

With the 1990s came the 'information superhighways' debates, the new information and communications technologies and the concept of the 'Information Society' and the 'Learning Society'. As Hirst and Norton (1998) discuss in some detail, these developments have had huge implications for governance and citizens in complex societies. Beginning with the USA, and extending rapidly to the G8 group of industrial countries and the European Union, there have been fundamental changes in information provision - from national level, through local authority level, to a wide range of non-governmental local initiatives and independent information providers.

### 2.2. The Independent Information Sector

In addition to the information services provided by government agencies, complex societies provide information to citizens through a network of independent information centres. The independent information sector comprises a variety of services with differing organisational structures, origins and target groups. In Ireland, for example, there are currently approximately 300 independent information centres throughout the country providing services to an estimated half a million citizens per annum. A Profile of Independent Information Services carried out for the NSSB (Nexus 1998) identified four main categories of information services - Money Advice and Budgeting Services, Youth Information Centres, Centres for the Unemployed and CICs.

### 2.3. Citizens Information and Advice Centres

Citizens information and advice centres, which are now found throughout both complex and developing societies in many cases have their origins in, or are modelled on, the UK Citizens Advice Bureau (CAB).

At various times over the years there have been CAB-type advice agencies operating in Ireland, the Netherlands, Israel, Australia, New Zealand, Hong Kong, India, Canada, the USA, the West Indies, Zimbabwe and South Africa, to name but a few. Where these have proved to be lasting initiatives, they have often formed themselves into their own national associations.

## 2.4 UK Citizens Advice Bureaux Service<sup>4</sup>

From its origins in 1939 as an emergency service during World War II, the CAB service has evolved into a professional national agency. It provides a free, confidential and impartial advice service through a network of 700 main centres and another 1,000 outreach locations. Each CAB is an independent charity, relying on funding from the local authority and from local business, charitable trusts and individual donations. As well as giving advice, the CAB service uses its bank of client evidence to identify local and national services and policies where change is required. It has built a strong reputation, nationally and internationally, for accuracy of information, advocacy and representation at both client and organisational level, and for independent analysis.

There are more than 28,000 people in the CAB service, 90 per cent of whom are volunteers. They include CAB advisers, administrators and management committee members. Each CAB is affiliated to the National Association of Citizens Advice Bureaux (NACAB), which sets standards for advice, training, equal opportunities and accessibility. NACAB also co-ordinates national social policy, media, publicity and parliamentary work.

In 1999 the CAB service dealt with over 6 million queries. The main problem areas were social security, consumer, debt, housing and employment. Independent research commissioned by NACAB indicates that insecurity is at the root of the vast majority of the six million problems dealt with by the CAB service. The report connects insecurity of income, insecurity in housing, insecurity in employment and insecurity in family relationships with debt, homelessness, family breakdown and serious ill-health<sup>5</sup>.

NACAB has a strong advocacy and representation dimension at both client and organisational level. At the client level, information givers and advisers help fill out forms, write letters, negotiate with creditors and represent clients at court or tribunal. At the organisational level, NACAB, along with organisations such as the Child Poverty Action Group is very active in advocacy and representation to bodies such as the powerful Social Security Committee (Social Security Committee UK 2000, Social Security Committee UK 1999).

NACAB also has a number of services and projects which are specifically designed to meet the needs of people with disabilities. These include services for blind and partially sighted people, for deaf people and people with hearing impairment, for those with learning difficulties and services for those with mental health difficulties.

Perhaps the most significant service is the Home Visit service. The provision of home visits is part of the core work and it is an expectation of membership that all CABs strive to make their services available to disabled and housebound people (NACAB, 1995).

NACAB is currently working on two major e-projects, CABnet 2000 and CASE

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<sup>3</sup> [www.nacab.org.uk](http://www.nacab.org.uk).

<sup>4</sup> *Ibid.*

(NACAB, 1999a). CABnet 2000 is designed to ensure that the CAB service is well positioned to operate in an increasingly electronically interactive world. It will deliver a national network of integrated computer and advice systems by 2003. Currently, members of the public can access CAB information 24 hours a day<sup>6</sup> via user-friendly terminals in some CAB waiting rooms, libraries, other public internet access areas, or from home. Eventually this system will link all CABx on a special CAB intranet. NACAB hopes that these advances will make access easier for disabled people and those who, for whatever reason, find it difficult to get to a CAB.

NACAB is very aware that projects such as CABnet 2000 is causing some anxiety amongst CAB information and advice givers who feel that these moves to develop the information capability of citizens have potential dangers. Circumventing the diagnostic and interpretative abilities of the information giver, whether this be face-to-face, at the end of a telephone line or in a letter, would be a cause of concern to many staff. However, NACAB would not see projects such as this as a replacement for CABx but rather as an alternative means of securing information and advice for people who would not go to a bureau, either because they do not regard it as a service for them, or have difficulties reaching a bureau, or simply because they are unaware of the service.

CASE (Case Management System), to be operational from 2001, is designed to be a confidential database for recording client cases. It will allow all information coming into a bureau to be recorded, stored, collated and assessed electronically. NACAB hopes, and initial feasibility studies supports this hope, that this process will bring benefits to the information givers, to clients, to managers and to funders (NACAB, 1999a). It will give information givers automatic access to client records for managing cases, will provide managers with a more detailed understanding of their cases and will enable easier evidence gathering to identify trends and facilitate social policy and campaigning work at local, regional and national levels.

For some time NACAB has been concerned that, although campaigning for social justice is one of the twin aims of the CAB service, it often takes a back seat simply because advice-giving requires such immediate demands. The CASE system will facilitate the evidence gathering process by allowing information to be transferred from case notes to evidence forms. Because the whole system will be more streamlined, advisers will have more time to spend on social policy work. From the managerial perspective, the CASE system will analyse up-to-the-minute data rapidly in whatever permutations are required. The speed and ease of comparing data from different sources will give managers freedom to use different sets of statistics for different purposes.

NACAB's Citizens Advice Bureaux Service Membership Scheme has detailed quality assurance standards to which all its bureaux are expected to operate (NACAB, 1999b; NACAB, 1996). These standards are detailed later in this chapter.

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<sup>6</sup> [www.advice.org.uk](http://www.advice.org.uk)

## 2.5. Northern Ireland Association of Citizens Advice Bureaux (NIACAB)

CABx in Northern Ireland are supported by the Northern Ireland Association of Citizens Advice Bureaux. The CAB service is the largest advice service in Northern Ireland, dealing with over 200,000 queries annually through 28 main offices and 85 other outlets<sup>7</sup>. The two main aims of NIACAB are: (a) to ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available, or through an inability to express their needs effectively; and (b) to exercise a responsible influence on the development of social policies and services, both locally and nationally. It aspires to make the service available to everybody regardless of race, sex, belief or disability.

NIACAB has a unique social security advocacy training course which was developed in response to the need for quality advice and representation for those who need to challenge decisions made by the Social Security Agency on their benefit claims. The course is accredited by the University of Ulster and covers the complexities of benefits legislation as well as the difficulties of interpreting the evidence which is presented when a client claims a benefit.

## 2.6. Citizens Advice Scotland

CABx in Scotland are co-ordinated and supported by Citizens Advice Scotland, the Scottish Association of Citizens Advice Bureaux, and its member bureaux form Scotland's largest independent advice network. Founded sixty years ago, Citizens Advice Scotland is free, independent, confidential and impartial. Citizens Advice Scotland has a policy of empowering people to tackle their problems head on by providing advice and practical support on any subject.

There are 150 CAB Service points that cover all of Scotland from the islands to city centres. Last year over 10 per cent of Scotland's population used the CAB Service and brought over half a million problems for advice, information and practical support<sup>8</sup>. Last year, over 2,500 highly trained volunteers gave over 700,000 hours of their time to the CAB. Independent research by MORI Scotland has found people trust their CAB. The overwhelming majority (94%) of CAB users are satisfied with service and almost all users (98% ) would recommend the CAB.

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7 [www.niacab.org](http://www.niacab.org)

8 [www.cas.org.uk](http://www.cas.org.uk)

9 [www.mcgovern.co.nz/cab](http://www.mcgovern.co.nz/cab)

## 2.7. New Zealand Association of Citizens Advice Bureaux

New Zealand Association of Citizens Advice Bureaux (NZACAB)<sup>9</sup> provides free, up-to-date information and confidential support and advice about a range of areas including consumer problems, employment and unemployment, housing, health and welfare. Every year nearly half a million enquiries come through the more than 90 bureaux around New Zealand. There are more than 2,500 volunteers working for Citizens Advice Bureaux around New Zealand. They have a CAB Database which is crucial in helping maintain a quality, up-to-date information service.

NZACAB defines its role in terms of information provision, advocacy and social policy. It sees the Citizens Advice Bureau in the community as providing information directly or by referral to other services, acting as an intermediary for clients, identifying gaps in existing services, becoming an advocate for people affected by them, and encouraging new projects which could improve the wellbeing of the community. Citizens' queries are seen as providing an important source of issues impacting on communities. Through recording and monitoring the queries, NZACAB takes up particular concerns with government and other organisations about matters that are affecting people in the community.

In the late 1990s, NZACAB, in association with the Rural Affairs and Social Science Policy Group of the Ministry of Agriculture, produced a series of social policy reports focusing primarily on the information needs of rural communities. The final report in the series (NZACAB, 1997) implements a major social policy recommendation in an earlier report (NZACAB, 1993) that NZACAB provides data to the Ministry of Agriculture to enable it to monitor ongoing patterns of client need.

## 2.8. Australia – Citizens Advice Bureaux

Because of its federal nature Citizens Advice Bureaux in Australia tend to be state rather than national organisations. Although they were originally modelled on the UK CABx, several of the Australian CABx are more in the nature of community and visitor information services than a classic 'citizens advice' service.

A typical example would be the South Australia CABx, which has been operating since 1958. It describes itself as an 'information service for the benefit of those who live in or visit Adelaide and South Australia'. It offers a free confidential information, listening and referral service but does not emphasise an advocacy or representation dimension. It publishes a number of pamphlets including, for example, Adelaide's Guide to Budget Accommodation, listing Adelaide's backpackers hostels and budget hotels/motels.

## 2.9. Citizens' Information/Advice Centres and Information and Advocacy

A study in the UK funded by the British Library Research and Innovation Centre (Marcella and Baxter 1999a) compared public libraries with Citizens Advice Bureaux and drew the following conclusions:

- All CAB staff and volunteers complete a basic training programme and have available a supplementary and more specialist set of training programmes. Public library staff receive some induction and training in information giving, but usually only as part of more generic training.
- While there was poor availability of statistical information in public library services, CABx have a systematic approach to analysing enquiries and evidence forms to identify significant issues and problems amongst clients.
- The mainstay of the CAB network is the NACAB Information System. Public libraries were split between those that had collated their community/citizenship collections into a discrete section and those that had materials dispersed throughout their classified system.
- The majority of CABx do not presently access or enable public access to information electronically. Public libraries tend to have produced local community/citizenship information databases, although certain authorities had more highly developed projects underway.

The most fundamental finding, however, from the Marcella and Baxter survey was that public libraries concentrate on the facilitation of access to factual information, while CABx provide advocacy and representation for clients at tribunals and court appearances as well as information and advice.

## 2.10. Advocacy and Representation

Information enables people to pursue their entitlements and rights. For many, however, information alone is not sufficient. In this regard it has been argued (National Social Service Board 1998) that the role of independent information services is not merely a passive one, but one that can be important in monitoring, challenging and changing the status quo in relation to the provision of information and services by statutory agencies. For this reason, the advocacy and campaigning roles of the independent information sector need to be recognised in policy and structures and in supports to the sector.

Advocacy, which has always existed within human relationships, is a process of empowerment and can take many forms. It is a way of enabling those who may have

difficulty speaking up for themselves to do so, and thus can be key to involvement in decision-making. It generally means representing the views of a person or supporting them to exercise or secure their rights.

Advocacy can take a number of forms. *Legal advocacy* is perhaps the most widely known form of advocacy and is undertaken by professional lawyers on behalf of their clients. However, advocacy in the information context does not include legal representation. *Citizen advocacy* is a one-to-one partnership between a trained citizen advocate and a person who may not be, for one reason or another, able to represent his/her own interests. The concept of advocacy is particularly important where people are disadvantaged, marginalised, or discriminated against (Simons, 1998).

Other commonly recognised forms of advocacy include *public or class advocacy* (for example, organisations that lobby on behalf of a particular sub-set of people) and *self-advocacy* by individuals or groups.

*Professional advocacy*, undertaken, for example, by health and social care workers, welfare rights workers and citizen information and advice givers, can take many different forms. As with other forms of advocacy, professional advocacy may be short term and provide crisis support to an individual on a particular issue. On the other hand, it might mean working with an individual on an issue over a longer period of time.

One of the difficulties with professional advocacy, as undertaken for example by health and social care workers, can be a conflict of interest. If the professional is employed by the service-providing agency, then problems may arise when attempting to advocate for clients. Advocacy should be independent of service provision so as to ensure that conflict of interest is not an issue (Simons, 1998; Craig, 1998; Reid, 1994).

Advocacy services, as defined in the Comhairle Act (2000), include services in which the interests of a person seeking a social service are represented in order to assist such a person in securing entitlements to such a service, but do not include legal representation.

Figures released in 1999, from the Independent Tribunal Service in the UK, continue to support earlier empirical research (e.g. Genn and Genn, 1989), which indicates that those who are not represented in an appeal against a benefit decision have a lower success rate than those who have obtained representation. Figures for 1999 show that representation was provided in less than 40% of cases. This could be an indication that clients were unaware of their rights to representation or that they were unaware of the representation services provided by CABx, voluntary groups and other organisations. It could also be an indication that these organisations, whether through lack of training or some other reason, cannot cope with the demands of clients requiring representation.

Age Action Ireland (1997) warns about the dangers of idealisation and the need for definition. Unless there is clarity about the meanings and aims of different forms of

advocacy, there is a danger that those involved in advocacy, both the advocate and the client, may be over ambitious. The advocate may attempt to take on too much and the client may expect too much. It is important that both advocates and clients can evaluate what has been achieved.

## 2.11. Advocacy : A Scottish Experience

In a review (Scottish Executive, 1999) of services to people with learning disabilities, the views of those who use the services and their carers were sought.

The report finds that it was striking that advocacy did not appear to play a large part in most people's lives, suggesting a significant gap in the range of supports available. The very few who had advocates through a citizen advocacy scheme described the advocates' activities as both instrumental (task-centred) and expressive (providing friendship and emotional support). A small number of people reported being involved in self-advocacy within resource centres, at college or through People First Scotland. Each felt they benefited as a result, through helping themselves, supporting each other, and speaking up for themselves.

Implicit throughout this study is the finding that people want to be consulted more often and have greater involvement in decisions about how their needs are met. The findings suggest that some services had not progressed beyond informing people about what was to happen or that, where consultation did occur, tangible results were not always evident. Only a minority of arrangements came near to partnership.

This is also a finding that is endorsed by the guidelines to good practice in advocacy issued by The Scottish Office (1997). Although these relate specifically to the National Health Service, the guidelines generally stress the importance of involving those who receive services in the planning of those services. Advocacy has a key role in enabling people to make informed choices about, and to remain in control of their own care. Based on work undertaken by the Scottish Health Advisory Service (SHAS) and experience of four patient supporter pilot projects funded by the Management Executive, the Guide to Good Practice on Advocacy is designed to assist Health Boards and other agencies to establish effective advocacy services.

## 2.12 Legislation

Within Europe there is very little legislation directly related to advocacy. Outside Europe, for example, in Australia, the US and Canada, legislation has been implemented to create a framework for independent advocacy. In 1992, the Ontario Government in Canada passed a range of reforms to protect the rights of vulnerable adults, including an Advocacy Act and the establishment of an Advocacy Commission. The Act, for example, entitles a vulnerable older person to appoint an advocate or have an advocate appointed on their behalf if unable to do so themselves. In Ireland, the White Paper (2000), *Supporting Voluntary Activity*, acknowledged the importance of advocacy and representation in promoting active citizenship.

## 2.13. Training in Advocacy Skills and Knowledge

Advocacy requires adequate and appropriate funding for training, development and evaluation. The lack of appropriate training in the necessary skills, knowledge, approaches and values may be a barrier in limiting the potential of advocacy. Information givers need appropriate training in order to advocate effectively. Comhairle provides training courses on advocacy in the context of a query management framework in CICs. As already stated, NIACAB has put in place a social security advocacy training course.

In the UK the National Council for Vocational Qualifications has drawn up competency in advocacy standards for those who are completing a National Vocational Qualification (NCVQ, 1997). This identifies four components of advocacy:

- enabling clients to establish their need for advocacy;
- enabling the client to obtain an advocate;
- acting as an advocate on a client's behalf;
- enabling the client to assess the effects of advocacy.

The first element emphasises promoting choice and participation by the client through active listening and clear explaining. It sets out the limits of the support worker's role, the advantages and disadvantages of advocacy for clients, confidentiality and other legal issues and the methods of empowering clients in decision making.

The second part of the unit is concerned with helping clients to think through what they want and do not want from advocacy. It deals with making an initial contact with an advocate; with briefing an advocate on the client's rights and responsibilities, and the advocate's role in supporting these.

In the third element the performance criteria incorporate safeguards for clients based on clear identification of what clients want, anticipation of any potential conflicts of interest, decision-making which is consistent with the client's needs and values, and a readiness to seek advice and offer other forms of advocacy as appropriate.

The final part of the unit concentrates on monitoring and evaluating advocacy, particularly from the client's point of view. It recognises the support worker's role in raising any concerns about the effectiveness of advocacy with the client and states that outcomes should be assessed against the goals agreed at the start of advocacy.

There are a number of practical guides to advocacy skills, usually, but not always written for those in the health and social care professions (e.g. Bateman, 2000; Teasdale, 1998). Both of these authors examine the function of advocacy and discuss in some detail how to interview, negotiate and self-manage successfully. They provide

a structure for advocacy, a guide to the ethical implications, advice on litigation and legal matters.

In the case of Teasdale there is a useful section on drawing up an advocacy curriculum. This includes general advocacy objectives, an advocacy flow-chart and teaching plans for a model 4-day course which aims to:

- provide a general introduction to advocacy;
- explore ethics, skills and risks related to advocacy, particularly to empowerment;
- introduce supervision; and
- review skills and risks relating to speaking out on behalf of clients.

Some organisations in the UK provide courses in advocacy or with an advocacy or representational dimension. One good example is the 'Representing at Appeal Tribunals' course run twice-yearly by the Child Poverty Action Group. In this course, which is aimed at advisers who have little or no experience of representing at appeal tribunals, participants prepare and present cases at 'mock tribunals' and can take part in decision-making. The skills acquired on this course can be applied when representing at other forms of tribunal. The course includes:

- membership and constitution of tribunals;
- tribunal procedure;
- case preparation - collecting evidence, finding the relevant facts and applying the law;
- the role of the chair;
- rules of evidence; and
- advocacy and presentational skills.

## 2.14 Quality Assurance Standards

Comhairle has developed standards for service delivery for CICs<sup>10</sup>, according to which, CICs are expected to adhere to minimum standards in order to receive and retain registration with Comhairle, use the name of Citizens Information Centre/Service and attract funding accordingly.

Areas in which standards are applied and monitored are identified in the Standards for Delivery Document and include: management structure, hours of opening, information quality, information service delivery, service delivery mechanisms, access, record keeping and query management, social policy work, inter-agency co-operation/referral, training, finance, personnel, publicity, equality of access and monitoring/evaluation. The requirements for each of these elements of the service are listed and a number of performance indicators identified.

The NACAB's quality assurance standards (NACAB, 1999b) sets out detailed standards according to which all bureaux are expected to operate. These standards define all aspects of CAB service provision, including the quality of information and advice, the services of advocacy, representation and other specialist services, the undertaking of social policy work, and all organisational areas such as training and development, financial management, planning and managing resources, and networking and partnership.

In delivering a service that provides quality information and advice to clients, NACAB defines this in terms of the process of advice giving (professional practice) and the technical content of the information and advice (technical practice).

Professional advice covers the experience of the client as someone who is receiving a quality service. Technical practice is concerned with the technical accuracy of the information and advice given to clients. The quality assurance standards define the criteria which NACAB will use in a common audit tool to objectively measure technical accuracy.

In the undertaking of social policy work, the standards have clearly defined procedures and practices which enable CABx to fulfil their social policy role. For example, systems are in place to ensure that social policy issues are identified in information exchanges, and, if appropriate, a Bureau Evidence Form is completed. Responsibility for social policy work is clearly defined in relevant staff roles and clients are aware of the bureau's social policy role and activities.

On organisational issues, the standards detail the quality requirements to which the bureaux should operate in order to function as effective and efficient quality organisations.

Finally, with regard to the services of advocacy, representation, skilled negotiation, case-work and other specialist services, the standards require that bureaux provide these services to clients where they have the resources to do so. The decision is that of the individual bureau, but where the bureau is unable to provide these specialist services and there is no other local agency able to do so, the bureau should take action (under the CAB Service Aims and Principles) to promote the development of such services in whatever way possible.

# 3 Main Study Findings

## 3.1 Introduction

The research approach used in the study (see Appendix) was based on a process of building checks and balances into the system through the following data collecting mechanisms:

- observation of the information exchange process between information givers and clients;
- assessment of the information exchange process by clients;
- assessment of the information exchange process by information givers;
- discussions with information givers;
- interviews with CIC managers;
- independent assessment of the process used in a sample of cases .

## 3.2 Observation of the Information Exchange Process between Information Givers and Clients

The information exchange process between information givers and clients was observed for 127 clients. The distribution of these clients across the seven centres was as follows:

TABLE 2: CLIENTS OBSERVED IN SEVEN STUDY CENTRES

CENTRE	NUMBER	%
1	22	17
2	15	12
3	22	17
4	19	15
5	13	10
6	18	14
7	18	14
TOTALS	127	99*

\*Due to rounding, percentages may not always add up to 100

An Observation Record<sup>11</sup> and a set of Observation Notes was prepared. for each of the 127 information exchanges between information giver and client

### Main Categories of Queries

The queries observed during the study are categorised in Table 3 which refers to the main queries presented by the 127 clients. (In a few instances supplementary queries were also presented).

**TABLE 3: CATEGORIES OF QUERIES OBSERVED**

CATEGORY	NUMBER	%
SOCIAL WELFARE	51	40
EMPLOYMENT	28	22
HEALTH	11	9
HOUSING	8	6
MISCELLANEOUS	7	6
TAX	6	5
LAW/JUSTICE	5	4
FAMILY MATTERS	3	2
CONSUMER	3	2
DEBT	2	2
EDUCATION	1	1
MIGRATION	1	1
DATA PROTECTION/ FREEDOM OF INFORMATION	1	1
<b>TOTAL</b>	<b>127</b>	<b>100</b>

Although not strictly comparable, it is interesting to compare this breakdown with that of a Comhairle (2001) survey which found that the three main categories of queries were Social Welfare (43%), Employment (16%) and Health (11%).

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<sup>11</sup> A copy of this Observation Record is available on request from Comhairle

### Sources of Information Used by Information Givers

Information givers have a variety of in-house sources of information at their disposal. These include the Comhairle Citizens Information Database (CID), the Centre's own information stocks (i.e. leaflets, application forms, booklets etc.), other staff members, a local information folder and the Comhairle paper-based information files. Outside sources of information included Comhairle information staff and other agencies.

The main source of information used in processing queries was the CIC information stocks which was used in 46 per cent of cases, followed by the CID (40%), an outside agency (35%), another staff member (18%) and a local information folder or brochure (less than 5%). Comhairle information staff were consulted in one case. In three cases other sources of information were used (e.g. a client's ongoing tax query file in the Centre). In many cases more than one source of information was used.

In the Browne (1999) study, which examined in detail the activities of one CIC, the CID was a source of the information provided in almost two-thirds of cases, while an outside agency was only used very infrequently. A recent CIC Survey (Comhairle 2001) showed that the CID was used in 57 per cent of cases and an outside agency in 14 per cent of cases.

### Forms in which Information was Given

As would be expected, the most frequent form of information provision was verbal information (98%). Printed information already in stocks (41%) and information printed off the CID (23%) were also provided. Almost 16 per cent of clients were given both types of printed information and just over half of the clients got neither. Printed information was read aloud with the client in 43 per cent of cases. Assistance with filling in forms was given in seven cases (6%).

### Use of the Citizens Information Database (CID)

The use of the CID varied very considerably from Centre to Centre, both in the extent and the proficiency of its usage. In some Centres there was a high level of proficiency in using the CID. In these Centres, the CID was used routinely, used with confidence and used in such a way that the client became part of the information search, along with the information giver. Examples of good practice here were:

- organising the furniture in such a way that both the client and information giver could clearly see the screen;
- explaining to the client what was being looked for on the database;

- telling the client what was going on if a particular file was not helpful or another file needed to be opened;
- using the mouse to highlight parts of the screen when reading or discussing the contents with the client.

In other Centres the CID was used frequently but with less confidence. These tended to be the Centres which were staffed by relatively new information givers. Examples of poor practice here were:

- positioning the screen in such a way that the client could not read it;
- peering intensely at the screen for long periods with no explanation;
- suddenly disappearing from the room to get a printout without explaining to the client what was happening.

In two Centres, the CID was rarely used on the days of the study. Here the information givers had a practice of making telephone calls to an outside agency (e.g. a social welfare office, a health board, a tax office) to seek or confirm information.

In about one-fifth of the cases in which the CID was used, the information giver was not able easily to access the relevant CID information items or find the relevant information with ease.

Very few of the information givers, perhaps no more than 12-15 of the 44 observed in the study, seemed to be really comfortable with the CID. Very few – and there were some notable exceptions – were able to use the CID and engage with the client at the same time. In two centres, some of the most experienced and confident of the information givers did not use the CID at all.

### Use of CIC Information Stocks

In the cases in which CIC information stocks were used, only in three or four cases did the information giver have a difficulty in finding what was wanted. However, the Centres varied very considerably in the ease with which they accessed literature for the client. In one Centre, the arrangement was such that the exchange with the client was never broken.

In this Centre, as part of the initial training, each new information giver was required to compile a folder with one copy of each of the major booklets, brochures, application forms and local information leaflets. Each of these documents was placed in a separate plastic pouch in the folder. Each information giver kept his/her own folder and when a brochure or leaflet was given to a client, it was then replaced from stock at the next opportunity. When the information giver moved to a different desk or table, or went on an outreach visit, the folder was taken as well.

This contrasted with other Centres, where, if during the course of the discussion, a number of booklets or brochures were needed, the information giver may have had to leave the client on several occasions to go and look for materials.

Information givers did not always offer material that would have seemed useful (at least to the observer) from items that were in stock. In a couple of instances, a particular booklet or brochure was out of stock.

### Referrals, Contact, Representation and Advocacy

In almost 80 per cent of cases, clients were told about another agency/service - most frequently one or other section of the Department of Social, Community and Family Affairs. In almost half of these cases contact was made with another agency/service (see Table 4) on the client's behalf with the remainder being advised to make the contact themselves.

In all cases (except one by letter) the contact with another agency/service was made by telephone. In two of these cases, contact, although attempted repeatedly, was not successful because of telephone difficulties. In no case was either fax or e-mail used.

Where contact was made with another agency/service on the client's behalf (37% of cases), in the majority of cases (90%) it involved the finding out or confirming of information. Representation was made in almost a quarter (24%) of cases and advocacy was carried out on behalf of the client in 18 per cent of cases.

**TABLE 4: AGENCIES\* CONTACTED ON BEHALF OF CLIENTS**

AGENCY	NO. OF REFERRALS
DEPARTMENT OF SOCIAL, COMMUNITY AND FAMILY AFFAIRS	21
HEALTH BOARD	8
COUNCIL OFFICES	3
FAS	3
REVENUE COMMISSIONERS	2
NATIONAL REHABILITATION BOARD	2
OTHER AGENCIES	8
TOTAL	47

\*In a small number of cases, contact was made with a second agency. The table above lists the primary agency contacted in each case

## **Behaviour of Information Givers during the Information Exchange Process**

The information givers seemed generally to be at ease with the client (94% of cases) and also to engage the client appropriately by means of eye contact, nodding affirmation and so on (94% of cases also).

In most cases (95%) information workers appeared to understand the query and frequently (87% of cases) summarised the query back to the client to confirm understanding and/or sought further clarification (88% of cases) before giving information.

In all, except one, of the 11 cases (9%) where there was more than one information giver involved in the process, the interaction between the information givers was very good. They acknowledged and consulted each other, seemed at ease with each other, and generally worked well as a team.

In over 70 per cent of cases clients were invited to return to the Centre if they needed any more information or help on the query that had brought them in, or on any other query.

## **Behaviour of Clients during the Information Exchange Process**

From observation of clients during the information exchange process, it appeared that most (almost 90%) were able to clearly explain their query, were at ease with the information giver and understood the information that they had been given.

Options were discussed with almost two-thirds (64%) of clients. The majority (85%) of these seemed to understand the implications of the different options and choices. Only 2 clients did not seem to understand, and in the case of a further 10, it was unclear. Options were written out for clients in four cases.

Of the 127 clients observed in the study, 88 per cent were invited or encouraged by the information giver to take action on their own behalf. It appeared that most of these (87%) understood what action to take, three-quarters were happy with this invitation or encouragement, and three-quarters, also, showed a willingness to take this action. There were 25 clients (22%) who did not indicate a willingness to take action and 19 seemed to be unsure as to what they had to do.

## **Length of Time spent with Client**

The length of time spent with clients ranged from a minimum of 2 minutes to a maximum of 75 minutes.

### 3.3 Evaluation of Accuracy, Appropriateness and Adequacy of the Information Provided

As already stated, a set of Observation Notes was prepared for each of the information exchanges between information giver and client. The Observation Notes recorded:

- a brief account of the query and any clarifications requested by the information giver;
- sources of information used by the information giver;
- information (verbal and written) and advice given;
- options discussed ;
- other actions taken, including referrals, contacts with other agencies and call-backs;
- any other general observations that were relevant to a full understanding of the query and the circumstances surrounding it.

The accuracy, appropriateness and adequacy of information provided was assessed independently by two independent assessors. Each assessor evaluated 18 cases unique to her, plus 4 cases which overlapped with those evaluated by her colleague (a measure of inter-rater reliability). Inter-rater agreement was quite good (see Appendix).

#### Evaluation of Accuracy

The assessors were asked to evaluate the accuracy of the information given on a scale from 1 (lowest evaluation) to 5 (highest evaluation). As Table 5 indicates, a rating of 5 was given to 43 per cent of cases and a rating of 4 to a further 23 per cent (a total of 66%). A rating of 3 or below was given to 34 per cent of cases.

**TABLE 5 : EVALUATION OF ACCURACY OF INFORMATION**

EVALUATION SCALE	COUNT	%
1 (LOWEST)	3	7
2	6	14
3	6	14
4	10	23
5 (HIGHEST)	19	43
TOTAL	44	101

One of the cases given a low rating was an example of a rare occasion when the information giver did not check before giving out information. The client was a young male on a Back-to-Work scheme. He recently had a new baby and wanted to know if he had any extra entitlement for the child.

Initially, the information giver told the client that he had no extra entitlement, but the client queried this and asked her could she double-check. At that point the information giver contacted DSCFA Back to Work Allowance Section and was told that the client was entitled to £6.60 per week on receipt of baby's birth certificate. In this case, the client did get the correct information in the end but only due to his own persistence.

In another example, the client was a middle-aged woman whose husband had gone to the UK a month previously. The only income she had was £113 per week for fostering a 14-year old boy. She was unwell, and finding things difficult.

She was not currently working. She had worked part-time occasionally over the past two years but she had no stamps and no medical card. She was spending a lot of money on health matters. Although the information giver did use the CID File 6/2 she did not pick up from this that the fostering allowance is excluded from medical card criteria.

The 9 cases given a rating of 1 or 2 came from five different Centres and all from different information givers.

### Evaluation of Appropriateness

While the information provided may be accurate, it may not be appropriate if, for example, the client's situation and needs are not fully understood by the information giver. As Table 6 indicates, a rating of 5 was given to 45 per cent of cases and a rating of 4 to a further 25 per cent . A rating of 3 or below was given to 30 per cent of cases.

TABLE 6: EVALUATION OF APPROPRIATENESS OF INFORMATION

EVALUATION SCALE	COUNT	%
1 (LOWEST)	2	5
2	5	11
3	6	14
4	11	25
5 (HIGHEST)	20	45
TOTAL	44	100

All of the cases given a rating of only 1 or 2 for appropriateness of information provided, were also given a rating of 1 or 2 for accuracy.

An example of where it was felt by the independent evaluator that the information given was not completely appropriate concerned a young single mother. The young mother presented because the father was demanding custody of the child. The information giver gave the client the One Parent Families Information Guide and read out for her sections on Guardianship and Custody. The evaluator felt that it would also have been appropriate to have explored local supports for one-parent families with the client.

#### Evaluation of Adequacy

As Table 7 indicates, a rating of 5 or 4 was given to 60 per cent of cases in relation to the adequacy of the information provided and a rating of 3 or below was given to 40 per cent.

TABLE 7: EVALUATION OF ADEQUACY OF INFORMATION

EVALUATION SCALE	COUNT	%
1 (LOWEST)	3	7
2	8	18
3	7	16
4	13	30
5 (HIGHEST)	13	30
TOTAL	44	101

Of the 11 cases getting a rating of only 1 or 2 (and 7 of these cases had been given a rating of 1 or 2 for accuracy as well), there was at least one from each of the 7 Centres in the study. An example of inadequate information concerned a middle-aged man who came into the Centre to ask for the telephone number of the local Income Tax Office. The information giver treated this request as presented and did not try to widen it by requesting any further details or suggesting that the CIC might be able to help in a wider context.

### Relevancy of Options Discussed

The independent assessors were asked to evaluate the relevancy of the options discussed on a scale from 1 (lowest evaluation) to 5 (highest evaluation). Less than half of the cases assessed were given the highest or second highest evaluation. The 18 per cent of cases that had the lowest or second lowest evaluation for relevancy of options discussed also tended to have low evaluations for accuracy, appropriateness and adequacy.

**TABLE 8: RELEVANCY OF OPTIONS DISCUSSED**

EVALUATION SCALE	COUNT	%
1 (LOWEST)	4	9
2	4	9
3	15	34
4	7	16
5 (HIGHEST)	14	32
TOTAL	44	100

### Assessment of the Information Exchange Process by Clients

Immediately following the observation and recording of the exchange between client and information giver, the researcher approached the client and requested his/her co-operation in answering a few brief questions about the information exchange process that had just been completed. The dimensions examined in the assessment were:

- familiarity with a CIC;
- satisfaction with information given;

- follow-up actions by client;
- overall satisfaction.

A total of 85 clients (67% of total) contributed to this stage of the research process.

### **Familiarity with a CIC**

This was the first visit to a CIC for over half (54%) of those interviewed. The majority (95%) said they would return to the Centre; only one client said she would not return and three were unsure. All of those who would return would, not surprisingly, recommend the Centre to someone with similar queries. Three clients would not and one was unsure.

### **Satisfaction with Information Given**

Eighty-seven per cent of clients were satisfied with the actions taken by the information giver, one-tenth felt that there was more that they would have liked done, and a minority (3%) were not sure.

Almost all (96%) clients felt that the information giver understood their query and most (91%) felt that they got sufficient information. Seven per cent felt that they did not get sufficient information and a further two were not sure. A minority (2%) felt that they did not have the opportunity to ask all the questions they wanted to ask. Most (92%) felt that they were going home better informed on their query.

Clients were asked if they got the answers that they hoped they would get. Of the 24 per cent who answered 'no' or 'not sure', most were able to see the difference between getting the 'correct' information and the answer they hoped to get and were satisfied that at least they now had the right information.

### **Follow-up Action by Client**

Almost 88 per cent of the clients interviewed agreed that they were going to do something themselves to follow up the information that they had been given. By and large they were able to be quite specific as to what that was going to be. In almost all cases, the client's reported intended course of action closely reflected advice given to them by the information worker.

## Overall Satisfaction

When asked to describe the result of their visit to the Centre overall, 90 per cent of clients described it as either 'very satisfactory' (65%) or 'satisfactory' (25%). Almost 5 per cent felt it was 'just all right' and the remaining 5 per cent felt it was 'unsatisfactory' or 'very unsatisfactory'.

## 3.4 Assessment of the Information Exchange Process by Information Givers

As part of the research process information givers carried out an assessment of the information exchange process with the researcher as soon as was practically possible after the query was completed. Information givers completed this assessment in 107 client cases. The dimensions examined in the assessment were:

- overall handling of the query;
- the availability of information;
- advocacy;
- social policy feedback.

The following are the main findings from the information givers' assessment.

### Overall Handling of the Query

Information givers felt that that they had handled the query well in 97 per cent of cases.

### The Availability of Information

Information givers considered that there was sufficient information available to handle the query in 86 per cent of cases. In the 14% of cases (n=15) where this was not the case, the three most frequently given reasons given were:

- the client was holding something back or not fully explaining something (5);
- the information required was not on the CID, as would have been expected, and so phone calls to external agencies were necessary (3);
- there was difficulty making successful contact with the relevant external agency (2).

The following reasons were each given once:

- the client had asked for information on legislation still pending;
- three external agencies (DSCFA, FAS and Comhairle) all gave different answers to query;
- the Tax Office could not explain why it acted the way it did;
- the client was very distressed;
- the information giver felt out of her depth.

### Advocacy

The information givers felt that they had carried out an advocacy role during the information exchange process in 38 per cent of cases. It was apparent, however, that for many information givers the concept of advocacy was confusing. This point is discussed in more detail in 3.5 below.

### Social Policy Feedback

Just over a quarter (28%) of cases assessed by information givers, were regarded as having a social policy dimension. However, as with the concept of advocacy, the concept of 'social policy' caused confusion for many information givers. For example, some queries were identified by information givers as having a policy feedback dimension when this was clearly not the case. Also, some of the information givers commented that social policy was the responsibility of a designated person or persons in their Centre and, therefore, not an area in which they were competent.

## 3.5. Discussions with Information Givers

Focus discussion group sessions were held with 31 information givers across the seven centres. The following topics were included in the discussions: training, use of CID, referral, contact with other agencies, dealing with people with special needs, call-back and follow-up procedures, advocacy, clients' ability to pursue their information needs, development of CICs.

## Training

### Basic Training Course

Most of the information givers had either done, or were in the process of doing, a basic training course<sup>12</sup>. Outside the major urban areas, these courses are held in the Centre and are put together by the manager of the Centre in consultation with the and supported by the Comhairle Training and Development Service. In the major urban areas, the courses are organised from Comhairle headquarters and are available to information givers from a number of different Centres.

The basic training experiences of the information givers were mixed. On the whole the courses were regarded as informative, well presented and with good delivery. The following are some of the issues that were identified by information givers:

- Taxation was an area of particular difficulty for many information givers;
- Legal areas, especially family, employment and consumer law were also areas of difficulty;
- Local professional practitioners may not always be the best at presenting and delivering courses – however, there were some notable exceptions mentioned;
- Most of the modules were well received but some participants found three hours too long and others would have liked more handouts useful for home study.
- In Dublin, some information givers found one of the training venues difficult and time-consuming to get to by public transport; several also found the same venue uncomfortable (for example, for note taking).

### Ongoing Training Experiences

Most of the Centres, at least in theory, provide ongoing training programmes. However, this varied very considerably from Centre to Centre. One Centre tried to have an evening seminar once a month but very few attended, and were, at the time of the research, experimenting with a lunchtime seminar. The information givers in another Centre reported that, because of lack of support from other organisations in the region, a number of Comhairle seminars were cancelled. They have had only three or four in the last year but would like to have them at least once a month.

In a third Centre, one of the smaller ones, ongoing training seems to work quite well. They close the Centre once a month and bring in a local professional. Recently they

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<sup>12</sup> These courses are run over a 13-15 week period and include 2 sessions on using the CID.

had a senior information officer from the Department of Social, Community and Family Affairs. The following month they had a Court Clerk to talk to them about family law.

Some information givers (in smaller centres) complained that most courses seem to be available only in the larger CICs.

### Specialised Information Givers

Many of the information givers clearly felt that there were areas that they did not feel confident about in terms of their own knowledge and expertise. Several made the point that the quality of information given in their Centre would improve if they had more full-time, experienced, senior information officers, or in-house experts who specialised in complex areas such as taxation, employment law and family law.

Others disagreed with this analysis and felt that it is not necessary for any information giver to carry around a great quantity of 'facts' or to be a 'specialist'. What was important was to know who to be aware of outside the Centre in getting or confirming information, knowledge and facts.

### Competency with the Citizens Information Database (CID)

As pointed out earlier in this chapter, observation of the information exchange process suggested that Centres fell into one of three groups where the use of the CID is concerned:

- those whose information givers tend to use it frequently and competently;
- those whose information givers tend to use it frequently but not competently;
- those whose information givers use it less frequently.

Most information givers appeared initially to be very positive about the CID. However, further discussion in the Focus Groups elicited a number of complaints, the most frequent of which were:

- In updating the CID old files are often not removed and this makes it unnecessarily bulky and even misleading;
- The updates are very slow – even though items might be in 'What's New' it takes a long time for them to be put into main database;
- There are often technical problems with CICs updating their systems;

- Some preferred to ring an agency rather than rely on the computer on the basis that the CID lacks specific details relevant to individual cases;
- It can be hard to find the most up-to-date items of information;
- Some topics have far too much detail and could do with editing; in many cases the information could be presented as bullet points.

### Operation of Referral in Practice

None of the Centres involved in the study monitored the outcomes of referrals in any formal or systematic sense, although some information givers were more active than others in asking clients to report back on a referral outcome. Most of the information givers reported that feedback from a referral was very rare if the outcome was successful. There were exceptions to this. Occasionally clients did return to report a successful outcome. This was more so in Centres where a considerable proportion of the clients are 'regulars'.

It was felt that clients were more likely to return if the outcome of the referral had not been successful and more information or assistance was required. The overall feeling of the information givers was that an absence of feedback probably meant that the referral worked for the client.

Very occasionally, voluntary organisations or services to which clients had been referred contacted the Centre, with the client's permission, to get further information on the client's query. Statutory organisations might occasionally contact the Centre if they cannot help a client referred from the Centre, e.g., a Community Welfare Officer might do this if s/he felt that the client might come back to the Centre again with only half the story.

Some information givers reported that informal meetings outside the Centre sometimes resulted in feedback on a referral. The point was made that they often discover that a referral has worked because the clients send in their friends who give feedback.

### The Nature and Extent of Contact with Other Agencies on the Client's Behalf

The information givers reported that, generally speaking, agencies are very supportive of the Centres. In their experience, mentioning the CIC opened doors and usually resulted in full co-operation from the contact agencies. Many information givers differentiated between voluntary and statutory organisations in this regard.

Voluntary organisations were seen as generally working well with the Centres, understanding what the Centres are about and as being rarely defensive. While this was also generally the view about most statutory organisations in most areas, there were some exceptions. The Health Boards tended to be singled out by the information givers as often 'defensive', 'difficult' and 'not generous with information' but on the whole the information givers regarded this as a difficulty with individuals within the Health Boards rather than a Health Board culture per se.

Several information givers reported that the quality of contacts with the Department of Social, Community and Family Affairs and the Revenue Commissioners had improved very considerably in the last few years and many felt that these changes may be linked to the introduction of the Freedom of Information Act. Some statutory agencies were reported as being difficult to get through to on the phone. Also, there were regular instances where contact was made with the relevant agency to find that the only individual who could deal with the query was not available. This was a source of irritation and frustration to both client and information giver.

## Dealing with People who have Special Needs

### *Disability Awareness Training*

As stated elsewhere, the fieldwork for this study was carried out during the run up to the formation of Comhairle, the new mainstream information agency responsible for the provision of information, advice and advocacy to members of the public on social services.

On the whole the information givers were very concerned about how little information they had been given about the new agency and how this would affect their work, particularly in regard to responding to the needs of people with disabilities. As many of them pointed out, 'there are specialist aspects to the needs of people with disabilities that we would be unable to meet'. Information givers in some Centres stated that disability awareness training had been offered in their area. In one Centre, however, the information givers reported that a training course on disabilities was cancelled the previous year due to lack of interest in their area. In another Centre, two information givers recently attended a disability awareness training course in their region but were not very positive about it. In a third Centre two information officers attended a training day dealing with hearing and visual disabilities. They found it very useful in that it alerted them to the many complexities of dealing with disability which was more than just a matter of using 'common sense'. For example, they got a better insight into the importance of office layout for people with visual disability.

## The Information Needs of Ethnic Minorities

The two main ethnic minorities that used the Centres involved in the study were travellers and refugees/asylum seekers.

### (i) Travellers

One Centre in particular had considerable experience in dealing with the information needs of Travellers. In this Centre the information givers reported (and observation confirms this) that they were very comfortable with members of the Traveller Community. The Centre provides a mailbox service for over 30 families in the area and members of the staff give talks at a local training centre for women from Traveller families.

Some of the other Centres had occasional visits from Travellers but most had very few. In most Centres this was because, according to the information givers, there wasn't a community of Travellers in the area. Several information givers observed that it can be a very big step for Travellers to come into a CIC and ask for information.

### (ii) Refugees/asylum seekers

The Centre that had most experience in dealing with the information needs of Travellers, also had growing expertise in dealing with the needs of refugees and asylum seekers. In March 1999, the Refugee Information Service<sup>13</sup> began to explore the possibility of providing a specialised service in this Centre as a direct result of the increased numbers of refugees being housed in this locality. After considerable advertising in the community, the Refugee Information Service began working with the Centre in April 1999. This service is provided once a week and recorded a substantial increase in clients as the year progressed

Most of the remaining Centres, so far, had very little direct contact with refugees and asylum seekers (although they might have received third party phone calls, usually from other agencies). Even in areas where refugees and asylum seekers had been located, very few were, as yet, presenting themselves at the Centre. The few who did tended to be English speakers.

Very few of the information givers had any formal or informal training in dealing with the information needs of refugees and asylum seekers. In spite of their limited practical experience, many information givers were aware that empowerment is a difficult area for minority groups. Both managers and information givers pointed to the limitations of the service that could be provided currently by the Centres in this regard.

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<sup>13</sup> Comhairle provides grant assistance and development support to the Refugee Information Service

### The Nature and Extent of Call-Back and Follow-Up Procedures

As pointed out earlier in this chapter, clients were encouraged to maintain their contact with the Centre. In over 70 per cent of cases, clients were invited to call back to the Centre if they needed any more information or help on the query that had brought them in, or on any other query. Most information givers extended this invitation as a routine practice.

With regard to follow-up queries, the practice, as reported by the information givers (and as observed during the course of the study), varied considerably from Centre to Centre. In some Centres the information givers filled in the standard 'query follow-up memo' which were read by fellow information givers the next day, thereby ensuring that the query was brought to a conclusion. In other Centres, they were not familiar with the standard forms, but had their own 'follow-on book' or 'overnight book' to be read by staff the following day.

In some Centres, 'follow-on' tended to be the responsibility of the individual information giver who dealt with the query in the first place. This works quite well in Centres where most information givers are in the Centre most days. It clearly could not work in Centres that are staffed by information givers who come in for only a few hours each week.

It seemed to be the practice of a number of information givers to carry details of follow-up tasks in their heads. In discussing this practice with them, most would claim that they almost never overlook or forget a follow-up task, but this was difficult to verify.

In some Centres, clients with ongoing queries were encouraged to deal with the same information giver so that it was not necessary for the client to repeat the details. In other Centres concern was expressed that this approach would encourage 'clientelism'. In some Centres, there were clients who would only deal with a specific information giver.

Some information givers complained that it can be somewhat annoying if time is spent following up a query, only to find that the client does not return to get the follow-up, or returns with a different query, having lost interest in the first.

### The Nature and Extent of Advocacy on Behalf of Clients

Many information givers, both in their self assessment and in the focus groups, had a somewhat confused understanding of what was meant by advocacy and could only discuss the issue with considerable difficulty. A small number of information givers were quite unfamiliar with the word and its meaning.

Some regarded every private encounter (as opposed to dealing with a simple query in reception) with a client as a form of advocacy. Others did not. Some regarded helping a client fill in an application form as a form of advocacy, whereas others did not. Some classified all phone calls to an external agency looking for information as a form of advocacy. Others did not, unless there was a dimension of representation (e.g. requesting that a public health nurse visit an elderly person) or unless it was part of an ongoing case (e.g. sorting out a complex tax query).

The point was made that phoning an agency looking for information on the client's behalf can be a form of advocacy because information givers can often get through the barriers in a way that a client cannot. This in turn can give clients the information and confidence to pursue the matter themselves (see next section below). That initial step can be very empowering.

In only two of the seven Centres included in the study, could it be said with any confidence that all the information givers had a clear idea of what was meant by advocacy, what was meant by different levels of advocacy, and when a particular action on their part constituted advocacy<sup>14</sup>.

In both of these Centres, there was an awareness that advocacy was not the same as information and advice - that advocacy can be much more of a challenge than merely giving information and advice. In both of these Centres, there was an awareness that there were different levels of advocacy and it was expected that, as information givers became more experienced, they would progress to the more complex levels, such as accompanying a client to a Social Welfare appeal.

A number of information givers observed during the course of the study that UK citizens visiting the Centres, were more likely than Irish people to request and expect high levels of advocacy.

### **Clients' Ability to Pursue their Own Information Needs.**

CIC users for the most part were not seen as a homogenous group but rather as different people with different needs and with differing levels of ability to pursue their own information needs. However, in their practice, most information givers saw themselves as acting on the basis that, unless a client indicated very clearly to the contrary, s/he would prefer to talk face to face with someone in a private and confidential setting. Most information givers thus routinely invited most clients into one of the interview rooms or screened-off areas.

The information givers had mixed views with regard to allowing the public to have direct access to the CID. Some felt that it would not be a good idea to have the

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<sup>14</sup> The Comhairle 2001 Training Programme contains some courses on advocacy.

Database directly accessible for three primary reasons:

- Many clients need to talk to information givers – the human interface is important;
- The Database as currently designed is meant to be used by trained information givers and is not suitable for clients;
- Directly accessible databases would act as a magnet for children which would pose a difficulty.

Others had very different views, especially the small number of information givers who had experience of seeing the CID on public access with other information agencies. These information givers were positive about allowing clients have access to the Database provided it was up to date and suitably edited. As with those who were less positive, there was a concern that it could become an undesirable attraction for children.

### Future Functioning and Development of CICs

Most information givers, not unnaturally, tended to see the future functioning and development of CICs as broadly synonymous with the future functioning and development of their own Centre. The exception was the only Centre in the study staffed entirely by volunteers (see below).

As pointed out earlier in this chapter, the seven Centres that participated in the study had, between them, 117 information givers, including paid staff and volunteer staff, full-time and part-time. Of these 117, 34 were on Community Employment, Jobs Initiative or similar schemes, and only 7 were regular paid staff. Only one of these was full time. In Centre 3, the Centre with the second largest group of volunteers, the 11 volunteers looked after the two evening shifts each week and were only very occasionally called upon for daytime duty. In Centre 1, the Centre with the third largest group of volunteers, most of the 8 volunteers only did a few hours each week. Three of the Centres had no volunteers.

Essentially, therefore, five of the seven Centres in this study were largely dependent on information givers on short term Community Employment, Jobs Initiative or similar schemes. Many of these information givers spoke very eloquently about their love for their work, their concern for their clients and their pride in their Centre and in each other.

On the other hand, many of them felt concerned, anxious and frustrated by the realisation that there was probably no future for them, either in their Centre or in the wider field of information provision. The following comments were made by information givers:

- *There is a need to replace CE staff with full-time and part-time trained, paid information providers;*
- *There is no future for people on CE schemes – ‘ we will leave trained but of no use to the service - there is no investment in personnel’;*
- *CE schemes don’t work well as sources for staffing. The work is too complex - ‘one is only getting to grips with the work and then we have to leave’;*
- *We need more and more full-time professional people. Comhairle will have to invest in training – a key factor in us delivering a good service;*
- *It is supposed to be a launch pad for another job, but it is hard to get work in the information area;*
- *Unless the funding position changes, there is no prospect for development;*
- *Wages are a problem and attention to this is required – even salary scales for a fully trained full time information officer are very poor;*
- *CABx in the UK would have more full-time or trained information givers;*
- *CAB has a huge reputation. We are getting more and more UK people working and living here – they have a very different expectation – they expect us to deliver a professional service.*

In one Centre, there was a strong belief in and support for the voluntary aspect of citizens’ information provision. There seemed to be little or no support among information givers in this centre for the argument that information giving is a paid, professional field. They felt that they would continue to consolidate and develop a volunteer-based effective service. There was no support for the argument put forward in other Centres that information giving was too complex, too difficult or too technical for a volunteer doing only one three-hour shift a week. They argued that there was an ongoing key role for volunteers with a wide variety of skills and experience.

### 3.6 Interviews with Managers

During the course of the four days spent in each Centre interviews were held with each of the seven managers. The following topics were covered in these discussions and supplemented by information provided in each Centre's development/strategic plans for 2000-2003: monitoring the accuracy of the information given, training of information givers, volunteer information givers, social policy feedback, advocacy, location, building and equipment.

#### Mechanisms for Monitoring the Accuracy of the Information Given

From the perspective of the managers (most of whom saw themselves as having a developmental role rather than a hands-on supervisory role), the Centres have a number of both formal and informal mechanisms for monitoring the accuracy of the information given. Discussion with the managers suggested that, even within the more formal mechanisms, there was an emphasis on training, instructing and encouraging rather than on observing and recording.

At the more formal level training for information givers provided for:

- specific instructions to refer back to an experienced person and always to run a query past a more senior person if there is any doubt;
- an emphasis on the importance of team-work -- checking and confirming between information givers (even by the more experienced staff);
- an emphasis on information givers never second guessing answers to queries;
- provision for the less experienced information giver to sit in with a more experienced person for some time before being allowed to handle queries alone (in two Centres this mechanism was more formally organised than in the others).

A minority of Centres provided Comment Cards and Complaint Cards, which are visible and accessible in the reception area. Although the managers report that they are rarely, if ever, used, these are designed to give confidence to the client with regard to the accuracy of the information given, as part of the overall quality of the service.

Other mechanisms identified included:

- managers sometimes sitting in on queries;
- informal discussion of queries during breaks;

- discussion of queries at staff meetings (in one Centre the staff used to meet once a fortnight to review queries but were finding it difficult to find the time to continue to do this; in a second Centre they did have a monthly ‘infoshare’ meeting, but because of staff shortages had not had any for a while);
- encouraging staff to tell the client if they are unsure about the accuracy of the information available at the time of processing the query and to ask him/her to leave a telephone number or return to the Centre for follow-up.

As already stated, in one Centre, as part of the initial training, each new information giver was required to compile a folder with one copy of each of the major booklets, brochures, application forms and local information leaflets. The manager of this Centre was very enthusiastic about this approach (as were the information givers). It was seen as having a number of advantages:

- It allows the new information giver to acquire an early familiarity with the services provided at both national and local levels;
- It ensures that the new information giver acquires an early familiarity with the location and organisation of the stock in the Centre;
- It helps to ensure continuity in the consultation with client, as it reduces the need to leave the client to go searching for leaflets;
- The folder can be taken by the information giver when s/he moves to another desk or table in the Centre;
- It is very useful on outreach visits.

### Training Information Givers

For several of the managers, discussion concerning training for information givers provoked considerable frustration. The words of one manager reflected the view of several others:

*I am so involved in training, and retraining, and losing people and training again, that this is taking away from my main job which is development. Community Employment and Jobs Initiative and Job Start is not the answer – Centres need paid, permanent, information givers. They can be full, part-time, job share or whatever, but it needs to be a proper career. Information giving is serious, complex, and skilled. There must be continuity - there must be permanency.*

As several of the managers pointed out, in their view using Community Employment

is as much about losing good staff as getting staff - no sooner are they trained, competent and confident, than they have to leave.

At least two managers argued that there needs to be an accreditation<sup>15</sup> system for information givers. They expressed the view that Comhairle should make funds available and there should be guidelines on job specifications, educational standards, training, and professionalism.

For all the managers, training and training issues were seen to be vitally important. Many of them pointed out that the situation had changed over the last few years – it was no longer a case of people looking for information on the same set of social welfare entitlements. Complex questions, asked by articulate and increasingly demanding people, in areas of labour law, civil law, family law and personal taxation, were becoming more and more frequent.

Several managers pointed out that they found their regional network of Centres very helpful in looking at the training needs of the whole group. In a couple of Centres they closed down for a whole day or part of a day every month or every 2/3 months and had a training day for all staff. One manager pointed out that she has been trying to have a training plan meeting since January but there was just not enough time – in her view her Centre is understaffed and overworked.

The manager of one Centre argued for cross-border training involving NIACAB and Comhairle. In this Centre, increasingly, queries had a cross-border dimension - for example, an increase in the number of frontier workers and queries from Northern Ireland residents thinking of retiring to the Republic of Ireland.

The training approach in the Centre that is entirely run by volunteers is, as would be expected, somewhat different from that in the other Centres. In this Centre, as the manager observed, while there is a general interest in the ethos of training, a minority of volunteers do not make themselves available for formal training. Many of them would have a very good reason such as family or work commitments. In an ideal world the manager would do more training but tasks have to be prioritised. Volunteers get great support from each other and new people learn on the job from the more experienced volunteers.

### Volunteer Information Givers

Two of the Centres have no volunteer information givers at all (one of these had one volunteer but she was solely responsible for preparing social policy reports) and a third Centre has one or two who volunteer very occasionally. Three of the Centres have a mix of volunteers and non-volunteers. The three managers of these Centres would have slightly different perspectives on volunteers as information givers.

In one Centre there was a clear distinction made between the volunteers and non-volunteers. The non-volunteers did the 'heavy' day time work and the volunteers looked after the 'lighter' evening shifts on 2/3 evenings a week (in terms of volume, in the month prior to this study, the daytime staff dealt with 750 queries compared with 30 for the volunteers). The manager reported that both volunteers and non-volunteers were happy with this arrangement.

In the other two Centres the volunteers and non-volunteers worked side by side during the day. One manager reported little differentiation between volunteers and paid staff in that all the volunteers come to all the training sessions, get the same travel and other expenses as non-volunteers and participate fully in and move between the Centre's many outreaches. Volunteers were regarded by the manager in this Centre as part of the team and just as effective as paid staff.

The second manager was perhaps a little less enthusiastic about volunteers, with the exception of those who had a very serious commitment in terms of the number of hours given each week. Volunteers who only did one short shift a week were not seen by this manager (and also by the other information givers in this Centre) as getting the experience necessary to do the job satisfactorily.

In the final Centre, fundamentally very different from all the others, all 53 information givers were volunteers. Here, both manager and the volunteer information givers themselves, were very enthusiastic about the concept of volunteers successfully staffing key CICs. Several of the information givers were surprised to discover that in other parts of the country there were difficulties in getting volunteers of the right calibre. These volunteers were very proud of their CIC, of their work and very supportive of their manager.

This Centre had challenges different from any of the other Centres. Simply organising a rota and communicating with 53 volunteers took up a great deal of the manager's time. The challenge was to ensure that all the volunteers were fully informed and kept up to date. The manager felt that, while it would be helpful to have a full time, paid information officer to support volunteers, caution was required in this regard and such a person would have to be very carefully selected.

## Social Policy Feedback

Comhairle provides CICs with Guidelines for identifying social policy issues and providing feedback to Comhairle accordingly<sup>16</sup>. The Guidelines identify the following as aspects of queries where there was likely to be a policy feedback dimension – lack of information, inaccurate or incomplete information on social services and entitlements, anomalies or inconsistencies, discourteous treatment by the service

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<sup>16</sup> Revised Guidelines on Social Policy Feedback for CICs, *How to Fill in Comhairle Social Policy Records and Communicate Social Policy Feedback to Comhairle*, were circulated to CICs in April 2001.

provider, and differences in the way schemes are described and actual delivery. Social policy work involves assessing each query dealt with as soon as possible (and in any case by close of business on the day) in terms of all of the identification factors. CICs are expected to complete a social policy record sheet as accurately and comprehensively as possible for all queries with a policy feedback dimension and return these to Comhairle on a regular basis.

There was significant variation in the numbers of social policy records returned during the period May 1999 to April 2000 by each of the seven CICs involved in the study. The numbers ranged from a high of 110 in one Centre to a low of 1 in another Centre. These varying levels of returns would seem to reflect different managerial practices with regard to the importance and relevance of social policy feedback.

The manager of the Centre with the greatest number of returns had a written policy statement which pointed out that the Centre, in line with Comhairle guidelines, is committed to develop a social policy feedback ethos. This ethos implies that all staff accept social policy feedback as an integral part of the delivery of the service provided.

The manager acknowledged that, although it was their ideal practice to complete social policy records on the day of the query, this does not always happen and sometimes they are left until the end of each month. On the question of each CIC having a social policy specialist, he was of the view that all information givers should be equipped to deal with identification, awareness and recording of social policy issues.

At the other end of the spectrum, the manager of the Centre with only one return last year took the view that the information giver's responsibility was to the individual client. That Centre did not put a great deal of emphasis on paperwork. Any social policy feedback that occurred took the form of one of their senior information givers producing pre-budget submissions or providing feedback to other voluntary organisations.

Some of the Centres have one or more 'social policy specialists'. In one Centre, there is a volunteer who is not an information giver but who comes into the Centre every week to prepare social policy feedback reports based on information provided by the information givers. On average, one social policy report a week is sent to Comhairle. In another Centre, one of the senior information givers is responsible for filling in the social policy feedback records. In a third Centre, the manager carries out the policy feedback aspects of the work but expressed the view that there was insufficient feedback from the NSSB (Comhairle) on issues identified by the CIC:

*We do feed in social policy but if we don't get feedback we lose interest. We have had high profile social policy cases but they came to nothing ....*

Three of the managers expressed the view that Comhairle needs to do a lot more in the area of social policy work. As one manager expressed it:

*Social policy awareness supposedly differentiates CICs from other information providers. This is area where development is badly needed.*

## Advocacy Role

The managers had different interpretations as to what was meant by advocacy, and what levels of advocacy could be achieved in their Centre. The manager of the Centre with the keenest awareness of social policy work was also the manager who appeared to have the best understanding of advocacy. In this Centre the advocacy dimension in citizens' information was seen as having four levels:

- getting further information relevant to the query;
- writing a letter on behalf of the client;
- helping the client prepare for appeals and hearings;
- accompanying the client to appeals and hearings.

In this Centre, undertaking advocacy at all these levels was part of the development of the service. However, currently, advocacy at levels 3 and 4 was only undertaken by the most senior information givers. This manager is very aware that advocacy, if not done properly, could backfire and have a detrimental effect on the work of the Centre. There is, therefore, a policy of having all information givers attend courses on advocacy so that they have a very clear understanding of what is involved. Information givers in this Centre, including those still relatively inexperienced, had a good understanding of what was meant by advocacy. A second manager defined the various levels of advocacy as:

- making a phone call;
- filling in an application form;
- writing a letter;
- representing a client at a hearing.

In this Centre, one of the more senior information givers is currently doing training in advocacy work and is the Centre's main advocacy person. At the other end of the spectrum, two managers would only see the highest levels of action taken, as outlined above, (e.g. representation at a Social Welfare appeal, accompanying a client to a Social Welfare or Health Board office) as advocacy work. They would see the other actions listed above as a normal part of information provision.

Several of the managers pointed out that, while they had no difficulty with advocacy work per se, they have to exercise caution in ensuring that they have the full and accurate story from the client involved.

## CICs - Location, Building and Equipment

### *Location*

Most of the managers were happy with the location (as opposed to the actual building) of their Centre. A number pointed out that being located on a quiet side street (for confidentiality) but very close to main town centre (for accessibility) was ideal.

### *Building*

In terms of facilities for clients, five of the seven Centres had reasonably spacious reception areas. The remaining two were cramped, and in the case of one, because they do not have a dedicated receptionist/administrator, the reception area was often unattended. In this situation, when the manager and the two information givers on duty dealing with queries, there is no alternative but to put up a sign at reception asking people to take a seat. This is regarded by the manager as undesirable for many reasons, including confidentiality and security.

Four of the Centres were equipped with reasonably spacious rooms which could accommodate one or two staff, two or three clients and a desk with a computer, a phone and space for the information giver to make notes. A fifth did not have individual interview rooms but three screened off areas in the very large reception area. An information giver worked in one of these areas for the duration of his/her shift with full access to the computer, the desk, and his/ her notes and files. This worked very well.

Two of the Centres had very cramped rooms or areas for talking to clients, although one manager did point out that her facilities were a considerable improvement on previous arrangements. In a recent survey of clients organised by this Centre, lack of space was the main criticism (and indeed the only serious criticism) of the service.

In terms of facilities for managers, all of the managers were reasonably happy with their own facilities with one exception. Unlike her six colleagues, this manager did not have a separate office but rather a noisy, poorly lit, poorly ventilated corner of a busy reception area. There was minimal storage space and no privacy.

Four of the Centres had rooms that were sufficiently large to be used as meeting/training rooms. In the remaining three, events such as Board of Management meetings had, for example, to be held in local hotels. As one manager pointed out, 'as a result, some of our Directors have never even been in the Centre and so it is hard for them to have a sense of what is going on'.

In terms of facilities for staff, four of the Centres had separate kitchen/eating areas that are regarded by the managers as satisfactory, In one Centre, there are no food preparation/consumption facilities. For the most part, people changed shift at lunch-time. In the final two Centres there are tiny corners in the reception area where staff

make tea and coffee and which are hard to keep clean. Then, as one of the managers said, 'we eat our sandwiches wherever we find ourselves'.

Most centres had information stocks on wall mounted racks or shelves in at least one of their consultation rooms. In others, where this was not the case, it often resulted in a great deal of movement from interview room to stock room. In one Centre, where all the brochures were kept in display in the reception area, the information givers pointed out that this was a potential confidentiality problem in that staff getting literature from the display stand can be observed by waiting clients.

### *Equipment*

As would be expected, all of the managers had equipment needs that had not been met. Some of these were perhaps more basic than others. Several of the Centres could do with additional printers. It was pointed out, for example, that having to go to a different room to collect printouts can lead to disruption and loss of confidentiality, especially if the one and only printer is located in a different interview room with a different client.

Two of the Centres have an incoming phone line that is shared with other organisations in the same building. While the manager of one of these Centres reported that this was not a problem, for the other it is sometimes a source of frustration.

Some Centres had more and better storage facilities than others, and some Centres maintained their stores better than others.

Other supports mentioned by managers which would enable their Centres to give better service to clients included: overhead projectors, a new photocopier, high powered shredders, public access (i.e. touch screens) computers, scanners, automatic door for wheelchair access, and specialised equipment for clients with disabilities.

Several Centres used the Comhairle paper files for outreach work and a minority of managers (and also a minority of information givers) were unhappy with the fact that a decision had been taken by Comhairle to cease their production.

From the point of view of the information givers, facilities such as computers, printers, phone and fax lines were quite good on the whole, with exceptions here and there. In one Centre their printer is temperamental and has been like that for a year; in another one of their computers is not linked to a printer, in a third they badly need an additional phone line.

# 4 Analysis of Findings and Implications for Development

## 4.1 Introduction

Chapter 3 has presented the main findings of the study in respect of the key research questions addressed. This chapter will discuss and analyse these findings and their implications for the ongoing functioning and development of CICs.

## 4.2 Whether Information Provided is Accurate, Appropriate and Adequate

An information giver must have the personal and communication skills to provide information in a sympathetic and non-directive manner. However, in order to allow the client make choices and take action, it is also essential that the information provided is accurate, understandable and comprehensive (Ralaheen, 1999; Marcella and Baxter, 1999a, Steele, 1996).

Browne (1999), in his study on citizens' information, pointed out that because information in whatever form it is presented must be reliable and accurate, information workers are faced with the challenge of keeping themselves up to date about complex service arrangements and entitlement conditions. O'Gorman (1997) argued that accuracy must not be achieved, however, at the cost of comprehensiveness.

Surveys of accuracy, comprehensiveness, and adequacy of information provided appear to indicate that this is a difficult quality for clients themselves to judge. Marcella and Baxter (1999a), in their study of information needs amongst UK citizens, found that whereas about 70 per cent of respondents assessed the information given to them as 'accurate', and 7 per cent assessed it as 'not accurate', 23 per cent of respondents were not able or willing to make an assessment. When asked about its comprehensiveness, 25 per cent of respondents were not able or willing to make an assessment.

In the present study, while two-thirds of all cases assessed were given the highest or second highest evaluations by the independent assessors, in about one third of cases, the evaluations given were at the lower end of the scale This must be a cause for some concern.

The provision of accurate and reliable information is clearly bound up with training of information givers and with procedures used in Centres for monitoring the accuracy of information given. On the whole, the information givers in the present study regarded the basic training courses as informative and well presented. However, substantive areas of complex information, such as taxation, family law, employment law and consumer law, were areas of difficulty for many information givers. Both information givers and managers reported that clients were becoming more articulate, more informed and more demanding. A key conclusion that emerged from the study was that some information givers wore the burden of complex, specialist knowledge more heavily than others.

This was less of a difficulty in the bigger Centres where there were a number of long serving, highly experienced senior information givers who were available to their less experienced colleagues, if not full time, at least for part of each day. In some of the smaller Centres many of the information givers clearly felt that there were areas that they did not feel confident about in terms of their own knowledge and expertise. Those who coped best in the smaller Centres were those who approached complex problems on the basis that it was more helpful to the client for the information giver to know who to contact, or refer to, outside the Centre, than to be very familiar with a great quantity of complex information.

Managers had a number of both formal and informal mechanisms for monitoring the accuracy of the information given. Discussions with the managers suggested that, even within the more formal mechanisms, there was an emphasis on training, instructing and encouraging rather than on observing and recording. From the perspective of managers, however, there is no doubt that for many of them, the main obstacle to having information givers who can provide constant high levels of accurate and comprehensive information, is the frequent turn-over of staff. As several of them pointed out, in their view, using Community Employment and similar short term employment schemes is as much about losing good staff as getting staff - no sooner are they trained, competent and confident, than they have to leave. This is a serious challenge to managers and one that provokes a high level of frustration and difficulty.

### 4.3 Relevant Options Discussed and Explored

In his study, Browne (1999) noted that individual citizens do not experience problems in discrete categories but rather as a problematic whole. It is, therefore, important that the information provided is not only accurate and adequate but also relevant and comprehensive. It is thus essential that all relevant options are discussed and explored.

Information givers discussed options with almost two-thirds of clients. The majority (85%) seemed to understand the implications of the different options and choices. Only two clients did not seem to understand and, in the case of a further 10, it was unclear. Options were written out for clients in four cases.

As discussed in Chapters 3, the independent assessors gave the highest or second highest evaluation to less than half of the cases assessed and almost one-fifth of the cases assessed were given the lowest or second lowest evaluation. Those cases that had the lowest or second lowest evaluation for relevancy of options discussed also tended to have low evaluations for accuracy, appropriateness and adequacy. This finding has obvious implications.

## 4.4 The Nature and Extent of Advocacy and Representation on Behalf of Clients

The Nexus (1998) profile of independent information services in Ireland found that the degree to which services and centres engaged in advocacy and representation on behalf of their clients varied very considerably. On the one hand, almost all the Free Legal Advice and MABS services reported engaging in advocacy and representation as an essential part of their case-work. On the other hand, fewer than 30 per cent of CICs reported engaging in advocacy on behalf of their clients.

In this study, contact was made with another agency/service on the client's behalf in just over 37 per cent of cases. Information givers felt that they had carried out an advocacy role during the information exchange process in 38 per cent of cases whereas the researcher's observation records indicated an advocacy dimension in only 18 per cent of cases. This discrepancy is important because it is apparent that, as discussed in Chapter 3, many information givers have a very ill-defined notion of what is meant by advocacy. Many of them found it very difficult to articulate the concept in any meaningful way. This is understandable to a degree because very many of the information givers in the study were relatively new to the job or were volunteers with a weekly commitment of no more than two or three hours. However, there was some evidence to suggest that there was also considerable variation in management's understanding and interpretation as to what was meant by advocacy. This is undoubtedly a more fundamental problem. Only two of the seven managers participating in this study seemed to have a clear and unambiguous understanding of advocacy and of what levels of advocacy could be achieved in their Centres. In these two Centres, not surprisingly, the information givers had the best understanding, not only of the term, but, also, the levels of competency which they still had to achieve. It was clear in both of these Centres that advocacy and representation were recognised as specialist skills which should be offered by Centres, but in a supervised way so that each information giver was aware of his or her competency levels.

In a recent report, prepared for Comhairle, (Conroy and Pierce 2000) concluded that the expectation of advocacy on behalf of clients is as yet a minority phenomenon which will undoubtedly increase in the future. As already discussed in Chapter 2, the lack of appropriate training in the necessary skills, knowledge, approaches and values may be a barrier in limiting the potential of advocacy. If advocacy is to make a positive difference in the lives of citizens, and if it is to be effective, additional appropriate training is required for CIC information givers and managers.

The provision of advocacy and representation on behalf of a client is regarded as a skilled and specialist service (e.g. NACAB, 1999b). As Teasdale (1998) points out, advocacy can be a risky business for all concerned and is certainly not something to be undertaken lightly. If people are to be safe and effective advocates, they need education and training to help them meet the demands of the role. A good example here is the comprehensive training and support programme provided by Comhairle to the Money Advice and Budgeting Services.

The goal of the Comhairle's key CIC development process is to ensure that all citizens have easy access to good quality information, advice and advocacy services. However, a key finding of this study is that there is little consensus among information givers as to what is meant by advocacy in the CIC context. It was apparent that for many information givers the concept of advocacy was confusing. Indeed, a small number were quite unfamiliar with the word and its meaning.

In order to promote advocacy and representation as a skilled and specialist service provided by CICs, it is fundamentally important to ensure management understanding and support. Comhairle has recently introduced a new, Level 2 course on advocacy, designed for experienced information givers, organisers and development managers (Comhairle, 2000b). This one-day practical course, which is designed to address different forms of advocacy in the context of a query management framework, and which is limited to 25 participants, must, as a matter of urgency, be extended throughout the country. It is essential that, at least at manager and senior information giver level, there is a common understanding of what is meant by advocacy, and what is meant by a quality advocacy service within the CIC context.

## 4.5 How Referral Operates in Practice

As pointed out in Chapter 3, in almost 80 per cent of cases, clients were told about another agency/service. In less than half (46%) of cases contact was made with another agency/service on the client's behalf. The remainder were advised to make contact with the agency referred to themselves.

The referral and contact figures from this study seem to be considerably higher than those from the 1999 survey of CICs (NSSB, 1999). However, it is important to point out that there are a number of methodological and definitional differences between these studies and strict comparisons are not valid. It is also important to point out that several information givers reported that the quality of contacts with two central agencies (the Department of Social, Community and Family Affairs and the Revenue Commissioners) have improved very considerably recently. The information givers reported that, generally speaking, agencies, including most statutory agencies in most areas, were supportive of the CICs and understanding of their function. This has a positive feedback effect. If information givers are experiencing support and co-operation from contact agencies, then they are increasingly likely to contact them and make referrals, as this study shows.

The Ralaheen (1999) study of information provision at local level, in its analysis of inter-agency co-operation, notes that referrals of clients to other services appears to be implemented without full knowledge of what is on offer on the part of the referring service. It continued:

*Referrals are occurring without considerable reflection as to whether they are suited to the users needs; there was no warning of what lay ahead in terms of opening hours, documentation to be furnished or costs to be incurred (P.14).*

Although the Ralaheen study cannot be compared directly with the current study, the findings here on referrals were very different. There was considerable evidence from this study that there were good referral and contact practices and procedures in the CICs. The evidence from the study is that there seemed to be considerable knowledge of what was on offer, opening hours, what documentation needed to be furnished and what costs, if any, would be incurred.

Most referred clients were furnished with appropriate documents/information such as application forms, printouts, brochures, telephone numbers, addresses, opening times of clinics, times when CWOs would be in attendance and so on.

In those cases where contact was made with another agency or service on the client's behalf, procedures and practices were good on the whole. The client's permission was almost invariably sought prior to making a contact and explanations were given as to why the contact was being made. Several information givers were clearly more comfortable in using contact with another agency as a source of routine information rather than using the Database.

Evidence from the clients themselves, where 91 per cent felt they got sufficient information from the information giver and 88 per cent agreed that they were going to do something, usually something quite specific, to follow up the information given, suggests that clients on the whole felt equipped to follow through on referrals.

In the context of referrals, and especially referrals not working out to the satisfaction of the client, there was a great deal of evidence that clients were encouraged by information givers to maintain their contact with the Centre. In over 70 per cent of cases, clients were invited to return to the Centre if they needed any more information or help on the query that had brought them in, or on any other query. Most information givers extended this invitation as a routine practice. This is good practice because it makes it clear to a client that it is acceptable to come back and look for further assistance.

None of the Centres monitored the outcomes of referrals in any systematic sense, nor were any arguments proffered by staff as to this being particularly necessary or desirable.

## 4.6 The Nature and Extent of Contact with Other Agencies on the Client's Behalf

In 1995, the National Economic and Social Forum argued that greater integration in the delivery of all social services at a local level would be brought about by the ultimate establishment of a fully integrated system of 'one-stop-shops' throughout the country. A year later, a Department of Social Welfare (1996) Inter-departmental Report

revisited this theme and pointed to the lack of integration between and within the various government departments as a particular problem. The report proposed that information and advice about the whole spectrum of services be provided, where possible, at a convenient location in a 'one-stop-shop' environment which would:

*provide a single local contact point for customers which would be a gateway to the full range of social services provided by the State (P.65).*

As discussed in Chapter 1, it is Comhairle policy to work with others in the voluntary and statutory area to provide integrated service delivery in a 'one-stop shop' environment<sup>17</sup>. It is clearly vital that Centres have good contacts with other agencies, both statutory and voluntary, in order to provide an accurate and comprehensive seamless information service. However, as O'Gorman (1997) pointed out, the complete integration at a local level of information services provided by both statutory and independent agencies will take considerable time and organisation.

## 4.7 The Extent to which Gaps in Service Provision are Identified and Channelled to the Appropriate Agencies

In 1998, an NSSB seminal conference to discuss the role of information in shaping social policy concluded that a key issue in welfare provision is how to ensure that services provided by the State are responsive to, and meeting the needs of, those who use them. It was also concluded that a related, and equally important, issue is how to ensure that services and welfare provisions are shaped by their beneficiaries (NSSB, 1998).

A key function of Comhairle is to contribute to the development of social policy by using feedback from the users and providers of information and advice services. One of the principles underpinning the operation of CICs is that the service provided should contribute to the development of social policy, both locally and nationally, by providing feedback and comment based on the experience of citizens. This approach is based on the premise that CICs and other independent information providers are well placed because of their direct and regular contact with the public to identify instances where services are not meeting the needs of individuals adequately or equitably.

This principle is modelled on the procedures of NACAB where, over many years of service, the insights generated by CAB enquiries have been analysed and translated into evidence to shape improvements to the policies of Government and other bodies. However, it is important to note that unlike CABx, CICs, during the 1970s and 1980s, did not have an ethos of social policy feedback and that it is only since the early 1990s that the NSSB explicitly involved CICs in systematic contribution to the development of social policy by using feedback from the users and providers of information and advice services.

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<sup>17</sup> Comhairle is currently supporting a One-Stop-Shop initiative by Donegal County Council involving statutory and voluntary bodies, including CICs

The nature and level of social policy feedback varied enormously within the participating Centres, reflecting very different managerial practices with regard to its relevance and importance. As already stated, there was wide variation in the level of understanding of the information givers involved. It is clear from this study that further development is required in the area of social policy work, by Comhairle in its role as a resource for CICs undertaking social policy initiatives and by CICs in their readiness and capacity to provide effective social policy feedback. This is not to say that work has not already started<sup>18</sup>. For example, the New Information Givers Course has an entire module devoted to understanding the term 'social policy', identifying social policy issues and dealing with these issues at local level. The Comhairle Training Programmes 2000 and 2001 included a third level course on social policy work and taking responsibility at local level. Nevertheless a great deal of work has yet to be done in persuading both managers and information givers that social policy work should be seen as an integral part of the CIC service and should be planned accordingly.

A very important part of this plan will be the development of comprehensive educational and training programmes for managers and senior information givers in the first instance, fanning out to less experienced information givers with time. Quality training for both senior information givers and managers in the purpose of, the rationale behind, and the practical benefits from, social policy work will help to develop a fuller understanding of its key role in the work of a CIC.

## 4.8 The Nature and Extent of Call-Back and Follow-Up Procedures and How these are Monitored

The Browne (1999) study on citizens' information reported that in a small number of instances the query was ongoing, involving follow-up work which in some instances continued over several months. The NSSB (1999) Survey of CIC Queries reported that 85 per cent were recorded as having been completed by the end of client's first contact with the Centre. Of the 15 per cent which required further processing, 80 per cent would return to the Centre, while one-fifth would be contacted by the Centre.

Almost 16 per cent of the queries observed in this study had a call-back or follow-up dimension. With regard to follow-up queries, the practice, as reported by the information givers, and as observed during the course of the study, varied considerably from Centre to Centre. Some had systematic procedures in place while in others it was left up to individual information givers to deal with the follow-up aspects of queries they processed.

Some information givers complained that it can be somewhat annoying if time is spent following up a query, only to find that the client does not return to get the follow-up, or returns with a different query, having lost interest in the first.

## 4.9 Clients Taking Action on their Own Behalf

Browne (1999) points out that since information has a vital role in developing and maintaining 'active citizenship', there is a need to ensure that the approach to information provision involves both the information givers and the citizen. Of particular importance, he maintains, is the need to develop the 'information capability of citizens'. This refers to the belief that all citizens have an ability to acquire and use information for themselves and to participate in society accordingly.

Undoubtedly one of the best ways of dynamically developing an information capability is to encourage citizens to take action on their own behalf. Of the 127 clients observed in the study, almost 88 per cent were invited or encouraged by the information giver to take action on their own behalves.

Giving this encouragement to clients was not done in isolation since, as has already been stated, clients were for the most part routinely invited to return to the Centre if they needed any more information or help on the present query or on any other query.

The majority of clients seemed to understand what action to take and seemed to be happy with this invitation or encouragement and seemed to indicate a willingness to take this action. Most of the 85 clients spoken to during the study also agreed that they were going to do something themselves to follow up the information that they had received. By and large they were able to be quite specific as to what that was going to be.

In a survey (Marcella and Baxter, 1999a) of the information needs of a national sample of the UK population, the preferred methods of obtaining information, in order, were: 'talking face to face with someone', 'reading a book' and 'looking though a collection without help from staff'. The latter two would indicate citizens pursuing their own information needs. However, when users of Citizens Advice Bureaux (CABx) and other advice agencies are separated from, for example, library users, interesting differences are apparent. Face to face communication was preferred by almost 70 per cent of CABx and agency users, compared to just over 40 per cent of library users. On the other hand reading a book was preferred by almost 50 per cent of library users compared to 12 per cent of CABx and agency users.

As reported in Chapter 3, most of the information givers spoken to in this study did not see all citizens entering a Centre as a homogeneous group, but rather as different people with different needs and with differing levels of ability to pursue their own information needs. Some were looking for simple information in response to a straightforward query. Others required complex levels of representation and advocacy. The point was made that when a client approaches a CIC, the information giver does not know what level of service is needed. For this reason, in their practice, most information workers acted on the basis, that unless a client indicated very clearly to the contrary on entering the Centre, s/he would prefer to obtain information 'talking face to face with someone'.

Developing the information capability of citizens includes facilitating people to have direct access to information databases such as the CID. This study did not discuss this aspect with clients but it did seek the views of information givers and, as reported in Chapter 3, they had mixed views with regard to allowing the public to have direct access to the CID. A considerable minority, including the small number of information givers who had experience of seeing the CID on public access with other information agencies, were positive about allowing clients have direct access to the database, provided it was up to date and suitably edited. Others felt that the most important need for most clients, even the minority who think they know precisely what their information requirements are, is to be able to talk to an information giver. The view was that it is only through interactive discussion, questioning, elaboration and explanation that the needs of the client in respect of referral, representation and advocacy become clear.

Browne (1999) describes information capability as:

*more than just access to information - it is also the ability to use and exploit information and thus to contribute to the general problem-solving and development potential of an individual (p. 8)*

If developing the information capability of citizens is defined as encouraging citizens to take action on their own behalf by helping them acquire an initial 'impetus' of information, then there is a great deal of evidence from this study that this is taking place. Both from the observation process and through discussion with clients and information givers, it was apparent that encouraging citizens to take action on their own behalf was valued by both groups.

The majority (88%) of clients were invited or encouraged by the information giver to take action on their own behalf. This might involve, for example, filling in a form, posting a form that has been filled in with the information giver, making a phone call to a Health Board, visiting a local tax office. As already stated, when clients were encouraged to take action on their own behalf, they were furnished with appropriate information and were invited to return to the Centre if necessary. In other words. the problem or difficulty, could become, if the client wished, part of an ongoing process.

In both observing the clients and talking to them after the information exchange process was complete, it was apparent that this invitation made it easier for some clients to take on the responsibility of pursuing their own information needs.

## 4.10 Engagement with Client in Respect of Overall Life Situation

### Physical Environment

On the whole, with some exceptions, the location, layout and equipment in the Centres involved in the study were such as to enable information givers to engage and interact with clients in an appropriate manner. Premises had both advantages and disadvantages in this regard. Some were better located than others, some were more spacious or had better facilities than others and some were more accessible.

Two of the Centres shared premises with a number of organisations. In the case of one, the information givers reported that they find sharing beneficial – arrangements (such as reception duties) were very flexible, different people do different jobs, there is no tension and they can get help from each other. In the second centre, staff reported a certain degree of tension and difficulty.

Most of the Centres had well stocked and accessible displays of leaflets, brochures and booklets that could be used by clients who did not need to talk to an information giver. Most displays were wall mounted or on rotating stands, taking up little space and easy to keep tidy.

One way in which appropriate engagement with the client in respect of the actual overall circumstances of his/her situation was the use of the Mobile Citizen's Information Service (established by the NSSB in the early 1990s). This service, which has been operated locally by personnel from key CICs since 1998, allows the Centre to undertake outreach and promotional work in a variety of settings. Either alone, or in co-operation with other information providing organisations, it can bring information provision into diverse communities and locations.

During the study, six information exchanges were observed in the Mobile Unit. The Mobile is fully equipped with telephone facilities, the computerised Citizens Information Database, a printer, the paper-based Citizens Information Files and a comprehensive range of information booklets and leaflets. The information giver was able to give to clients the full range of information, advice and advocacy as would be available in the Centre. The Mobile, however, is not wheelchair accessible and is quite cramped.

Although, because of the logistics, it was not possible to talk to individual clients after the information exchange process, their body language and behaviour indicated a very high level of satisfaction with the service provided.

## 4.11 Procedures in Place for Dealing with People with Disabilities

Browne (1999) points out that "despite progress on a number of fronts in recent years, people with disabilities do not have equality of access to information services". This, he continues, is due to factors such as lack of physical access to buildings and the absence of basic audio and visual aids.

The Ralaheen (1999) study of information provision at local level in Ireland, carried out on behalf of the NSSB, found what is described as 'a very low level of disability awareness'. For example, very few of the service centres in the study had Braille or audio supports and approximately one-third did not have wheelchair access.

Four of the seven CICs involved in the present study were wheelchair accessible, two were not and one only with difficulty. Of the four that were accessible, only one was truly wheelchair friendly in that it had a sensor controlled, double front door leading into a large, open reception area. This Centre had screened-off areas for face to face consultation, all of which were wheelchair accessible. There was also a large ground floor toilet that was very easily accessed. None of the Centres had audio or visual aids of any kind, and only a minority of information givers had encountered clients with disabilities (with the exception of literacy problems). However, it could not be said that there was a 'very low level of disability awareness' in the Centres visited.

Of the two that did not have wheelchair accessibility, one was a listed building and would never have access. This situation was described by the information givers as 'embarrassing'. In this Centre, information givers arranged to meet wheelchair bound clients in a local coffee shop to overcome this impediment.

### Basic Audio and Visual Aids

None of the Centres in the present study had audio or visual aids of any kind. Some information givers were more aware of this than others. It was the experience of the minority of information givers who had encountered clients with disabilities, that people with hearing, visual or speech problems were usually accompanied. This meant that the information giver frequently communicated with the accompanying adult rather than the client.

The main disability-related issue encountered by information givers on a day-to-day was poor literacy skills. Clients often had difficulty in filling in forms. Some are very happy to admit a literacy problem – others needed very careful and diplomatic handling. A number of information givers pointed out that in their view application forms in general are very poorly designed and that this is a serious social policy issue.

In one Centre a training needs analysis was carried out with the information givers so that their views could be considered. Communication skills and dealing with people with disabilities emerged as important areas from the analysis.

As discussed earlier, the fieldwork for this study was carried out during the run up to the formation of Comhairle. This had served to heighten awareness among information givers of the lack of facilities, lack of equipment and lack of preparedness in the Centres for providing comprehensive services to people with various forms of disabilities.

## 4.12 How Clients Experience and View the Process as a Whole

The Browne (1999) study reported that when asked about their degree of satisfaction with the outcome of the visit to the CIC, 92 per cent declared themselves to be either satisfied or very satisfied. Only 4 per cent expressed dissatisfaction with the outcome. In general, in the Browne study, very high levels of satisfaction were expressed with the different aspects of the CIC service such as length of time waiting, reception area, receptionist, interview room, manner of staff and information received.

In the current study, where the emphasis was more directly on the information exchange process, very high levels of satisfaction were also reported by clients. The overall assessment of the process as a whole was described as satisfactory or very satisfactory by 90 per cent of clients. Almost all (96%) clients felt that the information giver understood their query and 91 per cent felt that they got sufficient information. Almost 92 per cent considered that they are going home better informed on their query than they were when they set out and 95 per cent said that they would return to the Centre. All of those who said they would return, also said that they would recommend the Centre to a friend with a similar query. These findings are very similar to those on other information/advice services reported in Chapter 2. An independent study by MORI Scotland found that the overwhelming majority – 94 per cent - of CAB users were satisfied with the service and almost all users – 98 per cent - would recommend the CAB.

More than 87 per cent of clients in the present study felt that the information giver had done everything possible for them and almost 88 per cent indicated that they were going to do something themselves to follow up on the information that they had received.

These figures, combined with those of the Browne study and with the findings of a survey of users of the Citizens Information Call Centre<sup>19</sup>, suggest that the experience of clients in CICs is a very positive one.

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19 O'Mahony-Browne, (2000) Citizens Information Call Centre, An Interim Evaluation Report, Comhairle

### 4.13 Key Training, Functional and Developmental Issues

The study findings have implications for key training, functional and developmental issues, including:

- quality of information;
- equality of access to information;
- staffing;
- services provided, including specialist services;
- networking;
- future development of the independent information sector.

#### Quality of Information

As already stated, one of the core principles of Comhairle is that information services should be comprehensive in scope, providing accurate, up to date information, advice and advocacy in relation to all social services. Studies by, inter alia, Browne (1999), Ralaheen (1999) Marcella and Baxter (1999a), O’Gorman (1997) and Steele (1996) all make the point that in order to allow the client make choices and take action, it is essential that the information provided is accurate, understandable and comprehensive. It is also essential that all relevant options are discussed and explored.

In this study, while the independent assessors gave the highest or second highest evaluation in a majority of cases assessed, the lowest or second lowest evaluation was given in a significant number of instances. This finding has clear implications for training of information givers and with procedures or mechanisms used in Centres for monitoring the accuracy of information given. Discussions with managers and information givers revealed a number of problematic areas in relation to both basic and ongoing training. Although, on the whole the basic training courses were regarded as informative and well presented, four areas of technical difficulty were identified by the information givers. These were taxation, family law, employment law and consumer law in the context of queries from an increasingly articulate population.

Managers pointed to the fact that the continuous turnover in staff meant that no sooner were information givers trained, competent and confident, than they left the Centre. This has clear implications for development and will be discussed further below.

The findings of the study suggest that training on the CID is an area that needs greater focus. Very few of the information givers, perhaps no more than about one-third of those observed in the study, seemed to be really at ease with the CID to the extent of using it while engaging the client at the same time. Of the 40 per cent of cases in which the CID was used, in about one fifth (10 cases), the information giver was not able easily to access the relevant CID files.

Difficulties were most likely to arise where the CID was used frequently but with low levels of confidence. However, in discussing this with the information givers who were observed to be ill-at-ease, the complaints tended to be more about the system itself than about the information givers' lack of competency. There were complaints that old files were often not removed, that updates were very slow, that it can be hard to find most up-to-date files, that there are too many details not on the computer and so forth. Nevertheless, it was the case, generally speaking, that where information givers were competent and relaxed with the CID and were able to engage the client in the information giving process, there were fewer complaints about the system.

Comhairle provides a Level 1 introductory course on the CID, which covers content and scope, effective ways of accessing information and updating the system. However, there was a view among some managers and information givers that the number of, and the availability of places on, these courses was inadequate.

Standards for service delivery in CICs, drawn up by Comhairle, underpin the importance of training in the provision of quality information. This emphasis on training is also reflected in Quality Assurance Standards for CABx (discussed in Chapter 2) and the Standards for Youth Information Centres in Ireland, developed by the National Youth Information Monitoring Committee (1996). While all information givers should receive quality training in agreed core areas, over and above this, a competency policy should include specialised training to ensure appropriate levels of expertise. Several of the information givers in this study recognised this need. As pointed out in the previous chapter, many made the point that the quality of information giving in their Centre would improve if they had more full-time, experienced, senior information officers, or in-house specialists in particular areas.

Several of the managers pointed out that the accuracy of information provided required that, as a priority, the service should be provided by a core group of full-time information givers. This is already happening but only in the biggest Centres. This core group of experienced information givers act as experts, as mentors, as facilitators, and as guidance tutors.

## Equality of Access to Information Services

Even before the recent Equal Status Act (2000) equality of access to all information services, including advice, referral, advocacy and representation, was a core principle of CIC development. It is implicit in the mission statements of of the Centres studied and was stated, in at least one instance, as aiming to *"provide all citizens with a free, comprehensive, quality and confidential information service regardless of race, creed, colour or sexuality"*.

Through outreach services in health centres, family resource centres and local community centres, through the Mobile Unit, through work with the Refugee Information Service, the Centres in the study implemented their mission of making services available and accessible, meaningful and relevant to all. However, as already discussed, the study indicated gaps and deficiencies in some aspects of the system, for example, the provision of disability awareness training and training in dealing with the information needs of refugees and asylum seekers. There was, among both information providers and managers, dissatisfaction with these deficiencies.

With regard to training in dealing with the information needs of refugees and asylum seekers, very few of the information givers in this study had any formal or informal training. In spite of their limited practical experience, many information givers recognised that ethnic minority communities had particular information needs. They recognised that there was a growing (and in some areas of the country an urgent need) for awareness training about different cultural groups for all CIC staff. Both managers and information givers were very aware of the limitations of the service currently provided by Centres in this area.

Some of the issues identified here have been, or are being, addressed by Comhairle initiatives. The most recent training programme includes courses at levels 1 and 2 on disability awareness; mainstreaming of services for people with disabilities; refugees, non-nationals and asylum seekers; and the role of CICs following recent equality legislation. However, as with many courses, they are few and far between in terms of number of events, geographical spread and number of participants. For example, the Refugees, Non-nationals and Asylum Seekers course is not being offered this year in either the Galway area or the South East part of the country, both areas with growing numbers of refugees, asylum seekers and non-nationals. The 'Disability Awareness in an Equality Context' course is, however, being offered in more locations than any other course in the programme.

Many of the information givers in the study had either only very recently completed the new information givers training course or were still going through it. For many of these, courses at levels 1 and 2 are not very appropriate. Consideration, therefore, needs to be given to including an appropriately designed module in the new information givers training course to at least introduce the principles of disability and minority group awareness in an equality context.

## Staffing

Training and related development issues (such as advocacy and social policy work) are for many information givers closely bound up with the issue of staffing. The seven participating CICs had, between them, 117 information givers, including paid staff and volunteer staff, full-time and part-time. Of these 117 information givers, only 6 per cent were paid staff over and above people on CE and Jobs Initiative programmes. Three of the seven Centres had no volunteers.

In a series of surveys on volunteering carried out by the Policy Research Centre during the 1990s, Ruddle and Mulvihill (1999) report that the percentage of Irish adults who volunteer their time across a wide range of activities has statistically declined from 40 per cent at the beginning of the decade to 33 per cent at the end. The average time given per volunteer amounts to a mere five hours per month. Findings from these surveys confirm the anecdotal evidence from many voluntary organisations that getting and holding onto good volunteers is becoming more and more difficult.

Although Comhairle is committed to the development of supports for volunteering and is committed to providing a range of services in information, training and organisational development support to voluntary organisations, the trend, since the early 1990s, is that fewer and fewer people, for a variety of complex reasons, are in a position to volunteer (Ruddle and Mulvihill, 1999). There is little evidence to suggest that this decline will be reversed in the foreseeable future.

The reality of the situation is that five of the seven Centres would not survive, and the output of a sixth would be severely curtailed, without the resources of the Community Employment/Jobs Initiative programmes. One of the difficulties in ensuring continuity and development (particularly in providing specialist services such as higher levels of advocacy and representation) is that many of these information givers are not available long term. This, as already stated, is a source of frustration both to managers and information givers (with the notable exception of Centre 7 - see below).

Many information givers on Community Employment/Jobs Initiative schemes spoke very movingly about their love for and pride in their work, their clients, their Centre and in each other. Because of their commitment to their work and the people who came to their Centres for help, advice, information and support, many of them felt anxious and frustrated by the realisation that there was probably no future for them, either in their Centre or indeed in the wider field of independent information provision.

For several of the managers, Community Employment/ Jobs Initiative schemes are as much about losing good staff as getting staff and the constant loss of trained staff was a cause of considerable frustration. They pointed out that the development side of their work was suffering because so much of their time is spent on training new staff. A strategic objective for most of the managers was the appointment of at least one additional, full-time, paid information officer.

Centre 7 is very different from the other Centres in that it operates as a key CIC run entirely by a large team of volunteers. The key to its success is a core group of highly experienced and highly trained volunteer information givers who have been with the Centre for many years, in some cases since the Centre's formal registration in 1976. These core volunteers act as a vital skilled resource for new volunteer information givers.

### Range of Services Provided

Although not all services were available in all the Centres participating in the study, the services provided included:

- main stream 'in-house' information, advice and referral services;
- advocacy and representation services;
- social policy feedback;
- legal and other professional information services;
- outreach services;
- providing information and advice services through the local media;
- refugee information services;
- utilising the Comhairle Mobile Unit.

While the study was primarily concerned with observing and documenting the first three services, the other services were also discussed with managers and information givers. In spite of the staffing difficulties experienced in some Centres and referred to above, most managers and information givers saw providing the other services, whether they be professional, specialist or outreach, as a fundamental part of their information service. Developing external linkages with, and bringing information services to, hospitals, prisons, Travellers' groups, groups for people with disabilities, as well as to rural and outlying communities, were seen as essential aspects of information provision. Where free legal aid or legal information evenings were provided, the managers reported high attendance levels, reflecting a significant need in the community. Several managers reported a notable increase in family law queries.

It clearly goes without saying that outreach services, whatever the target community, should be provided to a high standard and provide access to the full range of information available, in the most relevant and up to date manner. Regular contact with, and regular monitoring of, the outreach location is essential.

It is also important that outreach locations are physically accessible by all members of the target community, that they are clean and bright, warm and dry, pleasant and welcoming. During the course of the study, one visit was made to an outreach location serving a rural community. Although it is unfair to generalise from one experience, in spite of the fact that the quality of the information, advice and referral given was excellent, the location was cold, poorly furnished, poorly equipped and generally unattractive.

## Networking

On the whole, the managers of the Centres involved in the study considered that active networks and information exchange, at both local and national level, were vital to the overall development of the service. Typical networks included a regional Development Managers Network, local/regional information fora, and a range of ad hoc mechanisms for liaison and communication between local organisations, both statutory and voluntary, e.g., the local Health Board, County Council, FÁS Employment Services, Area Partnership Company, Chamber of Commerce.

Good networking however, means more than just informing other organisations of one's existence and the occasional phone call or committee meeting. It means actively promoting understanding between providers and developing shared quality standards across services. It means linking policy and practice in order to keep clients' needs at the heart of the service.

## Future Development of the Independent Information Sector

Browne (1999) examined alternative scenarios for the future development of the independent information sectors. Of the three scenarios discussed, the one-stop-shop concept is the one which has probably attracted most support in this sector both in this country and elsewhere. The one stop shop concept is based on the principle of providing a single point of access for citizens to information on the total range of services provided by the State.

The main defining points of this concept are:

- the removal of the need for citizens to travel to a number of different locations to get information or to access services;
- the potential for better liaison between the statutory agencies involved; and
- the potential for enhancing the role of independent information services in providing a gateway for citizens to statutory services.

This model is one which is supported by Comhairle. As pointed out in Chapter 1, a particular goal is to work with others in the voluntary and statutory area to provide integrated service delivery in a 'one-stop shop' environment.

Discussing this concept with managers and some senior information givers evoked considerable levels of enthusiasm with the debate revolving around the various possible structures, i.e., should individual agencies provide information at one location or should there be a single point of contact for all information needs.

Although the actual term 'one stop shop' was not uniformly agreed on, the concept of liaising and co-ordinating with other information, advice and advocacy services to provide a comprehensive and integrated information service, was supported by many.

In at least one Centre a strategic objective for the period 2000-2002 was to examine the possibility of the provision of a co-ordinated, structured service model along the lines of the 'one-stop shop' principle. This CIC is a community-based initiative involving the CIC, Comhairle and the local ICTU Centre for the Unemployed. This approach, in existence since 1997, has, according to the Centre's Strategic Plan, 'been regarded as a valuable and innovative method of integration of services, combining resources and involving the local community and statutory agencies in its management and delivery'.

## 4.14 Conclusion

The study had three main objectives. The first two objectives -- to identify and analyse the practice in CICs in respect of a number of research questions and to examine other models of citizens' information provision - were examined in Chapters 2 and 3. The final objective of the study was to outline the implications of the study for selected training, functional and developmental aspects of CICs and has been discussed in the present chapter.

Comhairle's strategy for information services has, at its centre, the development of an independent information sector based on the concept of citizens' information. Comhairle is committed to developing the sector primarily through the national network of CICs. Delivering accurate, appropriate and up-to-date information to citizens on social services, their social rights and their entitlements forms part of the core mission of Comhairle, which has a responsibility, through training and other supports, to ensure that the information provided by CICs is of a high quality.

Prior to this study, research data was available on, for example, categories of queries, the sources of information provided, the actions taken and the length of time taken to process queries. This study set out to provide baseline data on the actual information exchange process in CICs, the nature and extent of advice, advocacy and referral work, the extent to which the concept of developing the information capability of citizens is included in the way information is provided and the implications for training and development.

A number of key research questions were addressed: to what extent is the information provided accurate, appropriate and adequate; what is the nature and extent of contact with other agencies on the client's behalf; are clients encouraged to take action on their own behalf; are there procedures in place for dealing with people who have special needs; how do clients experience and view the process as a whole.

These questions were approached in the context of reviewing other models of citizens' information, advice, advocacy and representation, and by analysing the information exchange process and practice in a number of selected CICs. From these analyses, the study was able to outline the implications for the functioning and development of CICs and for the provision of training and other support structures, as discussed above.

The review of other models looked at standards of good practice in all aspects of the service including quality of information and advice; advocacy, representation and other specialist services; the undertaking of social policy work; networking and partnership; and organisational areas such as training and development.

The analysis of the information exchange practice was based on a process of building checks and balances through a number of data collecting mechanisms including: observation of the information exchange process between information givers and clients; assessment of the information exchange process by clients; assessment of the information exchange process by information givers; discussions with information givers and interviews with managers; and evaluation of a sample of query records by two independent assessors.

An overall picture emerges of a process which is greatly valued by both information givers and managers. No process is ever perfect, and as this Chapter has discussed, the findings of the study have important implications for training, staffing, specialist services (such as advocacy), and for the general development of CICs. The study found that, in spite of difficulties, shortcomings and frustrations, the basic component of good practice in the provision of information was very much in existence - the provision of accurate and appropriate information which is accessible to all citizens. There was an awareness that good practice included discussing and exploring relevant options, making appropriate contacts with and referrals to other agencies on the client's behalf and encouraging clients to take action themselves. For the most part, there was also an awareness of the need to strengthen the advocacy and social policy feedback aspects of the CIC service.

Most importantly and fundamentally, an overall picture emerges of an information process which is greatly valued and appreciated by the men and women, the citizens, who use CICs. This is evidenced not only by what they say about the process, but just as importantly, by what they intend to do for themselves as a result of information and advice, including referral advice, received. This is a process that will face new challenges but one that can be developed and enhanced to meet these challenges. This is a process that works.

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# APPENDIX – Study Methods

## Selection of Citizens' Information Centres

At the outset of the study Comhairle's Information and Research Service identified the following criteria for selecting participating Citizens' Information Centres:

- The study should be confined to key Citizens' Information Centres.
- There should be an urban/ rural mix in the Citizens' Information Centres selected.
- Some of the Citizens' Information Centres included should have an active outreach service.
- At least one of the Citizens' Information Centres should have a Legal Advice Service.
- There should be some variation in the query volumes of Citizens' Information Centres selected.
- The Citizens' Information Centres should be operating as key Citizens' Information Centres for at least one year.
- The selected Citizens' Information Centres should have indicated an interest in the study and a willingness to co-operate fully with the researcher.
- There should be Citizens' Information Centres from each of the two existing NSSB regions (North and South).

It was noted that, while these criteria could not ensure total objectivity in terms of being representative, it was reasonable to argue that Citizens' Information Centres selected according to these criteria were likely to broadly reflect the current and likely short-term future modus operandi in key Citizens' Information Centres throughout the country.

NSSB Regional Managers (2) and Area Co-ordinators (6) were invited to participate in the selection process using the above criteria. A number of Citizens' Information Centres were identified which were considered to individually and collectively meet the above criteria. Some Citizens' Information Centres were not included on the basis that they had recently participated in other NSSB research studies and that, therefore, involvement in the current study might place excessive demands on their resources. Others were not included because of current staffing shortages or because they were perceived by NSSB personnel to be in a transition phase.

The regional managers and area co-ordinators in each of the regions engaged in a process of informally contacting the Citizens' Information Centres identified in order to establish their willingness or not to participate in the study. This process took

somewhat longer than anticipated to complete because in some instances the Citizens' Information Centre's Board of Management had to be formally consulted and a decision had to await a meeting of the Board.

One Citizens' Information Centre declined to participate in the study because of the perceived impact it would have on the staff. Another Citizens' Information Centre had agreed in principle to participate in the study but was not included because of the requirement that at least three centres be located in each of NSSB regions.

The seven Centres which were finally selected were: two from a large urban area, and one each from the West, South-West, South-East, Midlands and Border Counties.

Following discussion with NSSB staff on the organisational and logistical aspects of the data collection processes, it was decided that the researcher spend 4 days in each of the 7 selected Citizens' Information Centres.

## Pilot Study

The pilot study was carried out in a key Citizens' Information Centre which was not one of the seven participating in the study. In January 2000, two days were spent in this Citizens' Information Centre, talking to staff, talking to clients, examining records and piloting procedures, questionnaires, and focus discussion group schedules.

## Main Study

### *Briefing for Participating Centres*

After the selection of the key Citizens' Information Centres was completed and the agreement of the selected Centres to participate was obtained, a detailed briefing was presented to the Board of Management, and through it, to the staff, of each of the seven Centres.

The briefing document included background information, the objectives of the study, the aspects of information provision which were to be considered in the study, and the data collection and operational procedures which would be put in place. These briefing notes were supported by additional briefing from NSSB staff.

Shortly after the briefing, direct contact was made with each participating Centre to arrange suitable dates for visiting the Centre and to clarify any outstanding issues.

## Visits to the Seven Key Centres

The four-day visits to each of the Centres commenced at the end of March, 2000 and finished at the end of May, 2000. With one exception, the four days spent in each Centre ran concurrently. With the one exception, for reasons external to the project, the visit was conducted in 2x2 days.

## Data Collection Tasks


The research approach was based on the principle of triangulation, a process of building checks and balances into the system through a number of data collecting mechanisms. Five main data collection tasks were undertaken in each of the seven Centres:

- observation of the information exchange process between information givers and clients
- assessment of the information exchange process by clients
- assessment of the information exchange process by information givers
- discussions with information givers
- interviews with managers
- independent assessment of process used in a sample of cases.

## Observation of the Information Exchange Process between Information Givers and Clients

During the four-day visit, as clients came to the Centres, an information giver explained to them, in a quiet and low-key manner, that the Centre had someone who was doing some work for Citizens Information Centres. If the client permitted, the person would like to sit in on the meeting between client and information giver, as a non-participant observer.

Of the 131 clients approached, across the seven centres, only four declined the invitation to permit the researcher to sit in on the meeting between client and information giver – one middle-aged man, one elderly man and two elderly women. As agreed with the information givers before hand, the clients who refused were not asked to give any reasons for their refusal. They were assured that their refusal was perfectly acceptable. The four clients who declined came from three different Centres.



During the information exchange process with the remaining 127 clients, the researcher sat quietly and took notes. Using these notes, the researcher prepared an Observation Record and Observation Notes for each of the 127 information exchanges.

The Observation Records recorded:

- main categories of queries
- sources of information used by information givers
- forms in which information was given
- use of CID and CIC information stocks
- referrals, contact, advocacy and representation
- behaviour of information givers during the information exchange process
- behaviour of clients during the information exchange process
- length of time spent with client.

The Observation Notes, which expanded on the quantitative Observation Records, were classified under the following headings.

- brief description of client
- description of query
- clarification sought and given
- sources of information used
- action taken
- information and advice given
- material given
- general observations

The purpose of the detailed, qualitative Observation Notes was to allow expert evaluations of the accuracy, appropriateness and adequacy of the information given and relevancy of options discussed. From the 127 Observation Notes, 40 were randomly selected and then randomly distributed between two independent assessors (see below).

The vast majority of the exchanges between clients and information givers took place in an interview room or screened off area. There were some exceptions to this. A few took place in the Mobile Information Unit which happened to be visiting a Centre at the same time as the researcher; some took place in an outreach centre and some were conducted in the reception area.

### Assessment of the Information Exchange Process by Clients

Immediately following the completion of the exchange between client and information giver, the researcher approached the client and asked her/him if it would be possible to ask a few questions about the information exchange process that had just been completed. A total of 85 clients were spoken to (34 males and 51 females). 42 clients were not spoken to for the following reasons:

- The personal circumstances of the client were such that it was not appropriate to approach the client; for example, the client was very recently bereaved or otherwise distressed (9).
- The client was in a hurry (e.g. collecting a child, running for a bus) and did not have time to wait (8).
- The circumstances in the Centre at that given moment did not allow an opportunity e.g. literally no private place available (10).
- The information exchange process took place in the Mobile Van and the physical layout did not allow for this (6).
- Miscellaneous reasons (9).

The dimensions examined in the assessment by clients were:

- familiarity with a Citizens' Information Centre
- satisfaction with information given

- follow-up actions by client
- overall satisfaction.

### Assessment of the Information Exchange Process by Information Givers

The seven centres that participated in the study had, between them, 117 information givers, including paid staff and volunteer staff, full-time and part-time. One of the Centres, the only one run entirely by volunteers, accounts for 53 information givers. The table below shows the distribution of the 117 information givers across the various categories. During the course of the study, the researcher did not work with, or even meet, all of the 117 information givers (see below).

	TOTAL IN CENTRE	CE/JI*	PAID	VOLUNTEERS
CENTRE 1	18	8	2	8
CENTRE 2	10	10	0	0
CENTRE 3	15	4	0	11
CENTRE 4	10	4	2	4
CENTRE 5	5	4	1	0
CENTRE 6	6	4	2	0
CENTRE 7	53	0	0	53
TOTAL	117	34	7	76

\* CE/JI – community employment, jobs initiative or similar

Following the interview with the client, the information giver assessed the information exchange process with the researcher, as soon as was practically possible. For a number of practical reasons, this might have been some time after the information exchange process. For example, by the time the researcher was finished talking to the client, the information giver may have gone to talk to a new client, or may have gone off duty, or may have gone to an Outreach, and so on. In 20 cases, for these and other reasons, the follow-up assessment did not take place. In 107 client cases, the information giver was able to complete the overall assessment.

Overall, these 107 assessments were obtained from 44 different information givers from the 117 information givers across the 7 Centres. In only 11 cases was there more than one information giver involved with a single client in the information exchange process.

The dimensions examined in the assessment with information givers were:

- overall handling of the query

- the availability of information
- advocacy
- social policy work.

### **Discussion with Information Givers**

During the course of the four days spent in each centre the researcher met with 31 information givers. Ideally it was hoped to have one focus discussion group session in each centre either with all or a significant number of information givers. This was possible in five of the seven Centres. In the remaining two the logistics were such that several sessions were held with one or two people at a time.

The focus discussion group sessions included the following topics:

- training
- competency with the Citizens Information Database (CID)
- the operation of referral in practice
- the nature and extent of contact with other agencies on the client's behalf
- procedures in place for dealing with people who have special needs
- the nature and extent of call-back and follow-up procedures
- the nature and extent of advocacy on behalf of clients
- clients' ability to pursue their own information needs
- future functioning and development of CICs.

### **Interviews with Managers**

During the course of the four days spent in each centre the researcher met with each of the seven managers. The following topics were covered in these discussions:

- mechanisms for monitoring the accuracy of the information given
- training, formal and informal

- volunteer information givers
- social policy feedback
- advocacy role
- equipment and supports
- future functioning and development of the Centre.

### **Independent Assessment<sup>20</sup> of Information Process**

A set of Observation Notes was prepared for each of the information exchanges between information giver and client. The Observation Notes recorded:

- a brief account of the query and any clarifications requested by the information giver;
- sources of information used by the information giver;
- information (verbal and written) and advice given;
- options discussed ;
- other actions taken, including referrals, contacts with other agencies and call-backs;
- any other general observations that were relevant to a full understanding of the query and the circumstances surrounding it.

The accuracy, appropriateness and adequacy of information provided was evaluated by two independent assessors. Each assessor evaluated 18 cases unique to her, plus 4 cases which overlapped with those evaluated by her colleague (a measure of inter-rater reliability). ). A total of 44 evaluations were made on 40 cases. Inter-rater agreement was quite good.

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<sup>20</sup> A copy of the Evaluation Sheet used is available on request from Comhairle







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