Citizens Advice - our approach to quality and the impact on client outcomes.

Ann Booth - Head of Performance and Quality Citizens Advice
Overview

- Citizens Advice
- Our quality framework
- Data Analysis
- Client Outcomes
- Questions
Citizens Advice

- Membership organisation
- Membership package
- Performance and quality framework
- Data
- Support
Focus on quality assurance

- Assurance for our clients
- Assurance for commissioners
# Local performance and quality framework

<table>
<thead>
<tr>
<th>Quarterly</th>
<th>Annually</th>
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</thead>
<tbody>
<tr>
<td><strong>Client experience</strong></td>
<td><strong>People management</strong></td>
</tr>
<tr>
<td>Continuous automated client surveys through SMS and email. Percentage sample of clients consenting to follow-up contact. Number based on robust sample size calculations. Quarterly reporting.</td>
<td>Automated survey of members’ paid staff and volunteers.</td>
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<th>Quarterly</th>
<th>Annually</th>
<th>Every 3 years</th>
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<tr>
<td><strong>Quality of advice assessment (QAA)</strong></td>
<td><strong>Leadership, research and campaigns, equality self-assessment</strong></td>
<td><strong>An on-site visit</strong></td>
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<td>Members review a sample of cases quarterly. The numbers are based on robust sample size calculations, banded to reflect local office size. The national charity's quality assurance team assess at least 10% of members’ reviews.</td>
<td>Members' trustees or chief officers complete and return a leadership self-assessment. The national charity verifies all local Citizens Advice self-assessments - this might mean they ask members to see documentation.</td>
<td>At least once every 3 years, the national charity will visit members. This ensures compliance with the Quality Mark accreditation requirements, advice quality standards (AQS) and Money Advice Service (MAS) debt quality framework.</td>
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Data analysis

- **Dashboard**
  - national level
  - local level

- Identifies where improvements are needed

- Deep dives on data cross referencing outcomes across the 5 areas
Data analysis findings

- Local offices achieving green in their LSA or in their people management survey, achieve better results in client experience relating to “would recommend” - the impact is magnified in cases where both the LSA and people management survey are green.

- Where quality of advice provided is rated poor or weak this shows through in client experience results relating to “finding a way forward” and “problem resolution”.
Support

- Comprehensive support package available
  - supportive interventions
  - formal interventions
- Ongoing measurement for sustainable change
Outcomes for clients and commissioners

- in our view quality assured advice is a fundamental part of social prescribing
- commissioners need to know they are commissioning quality services
- measuring performance and monitoring improvement via our PQF ensures better outcomes for clients
Any Questions?
Thank you

Ann Booth
Ann.booth@citizensadvice.org.uk