



# Overcoming barriers to advice

Joint research project from the  
Innovation Lab and Research &  
Campaigns Team

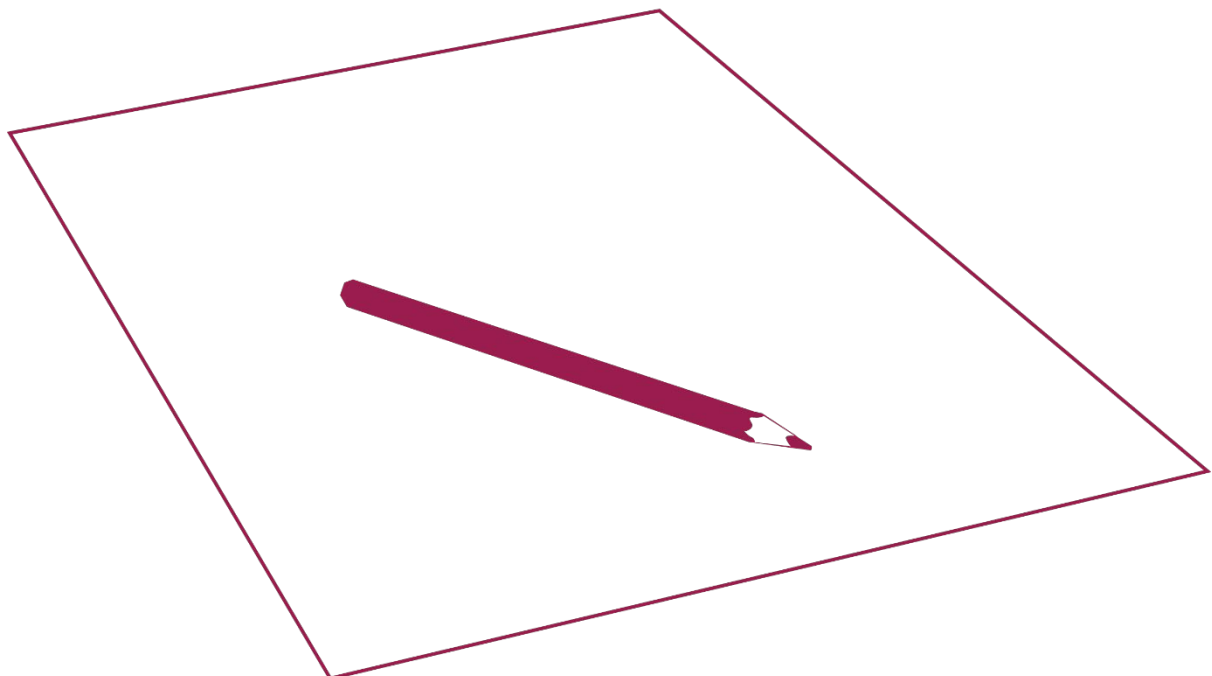
**citizens  
advice**

**Rushmoor  
Innovation Lab**

# Contents

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Introduction .....	1
Client survey .....	2
Community group survey .....	5
Participant community groups list .....	11
Adviser team survey .....	12
Research & Campaigns evaluation .....	13



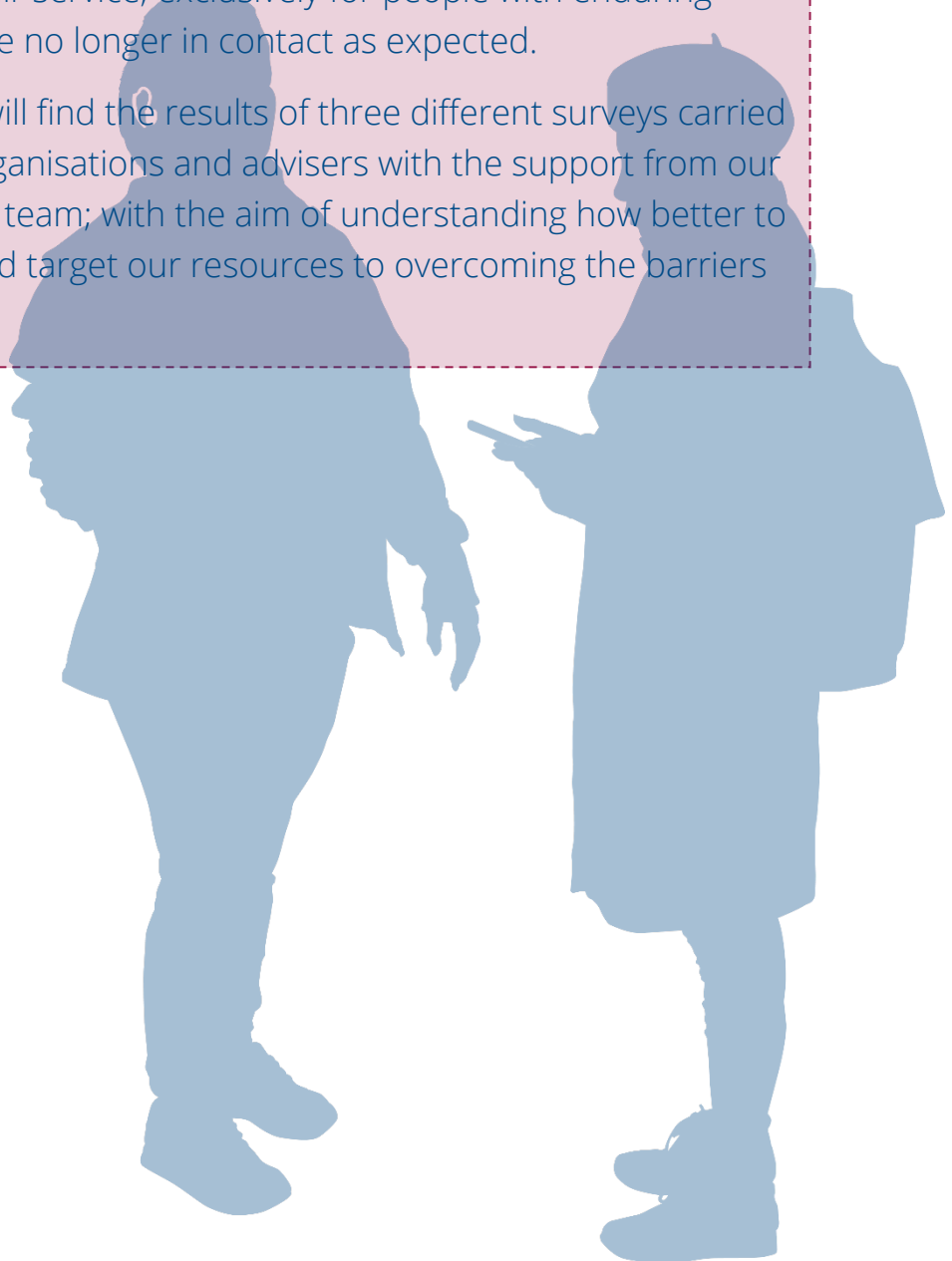
# Introduction

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During the early stages of the pandemic front-line workers at Citizens Advice Rushmoor raised increasing concerns that the most vulnerable users of the now suspended face to face services were not to be found amongst new users of expanded telephone and digital services.

Of particular concern was our large and mostly elderly Nepali community, who were well served by our highly successful Nepali language drop-in. Also, strong anecdotal evidence from our Heathlands Citizens Advice team that frequent users of their service, exclusively for people with enduring mental health issues, were no longer in contact as expected.

In this presentation you will find the results of three different surveys carried out on clients, partner organisations and advisers with the support from our Research and Campaigns team; with the aim of understanding how better to reach excluded clients and target our resources to overcoming the barriers through innovation.



# Client survey

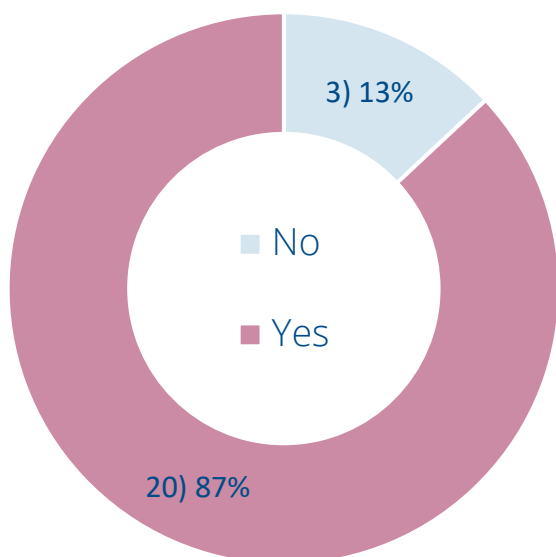
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In the first week of lock down we set up a Nepali Language Adviceline using local resources to replace the highly popular drop-in service.

The Nepali Adviceline was advertised through our website and social media or posters distributed – so callers would likely to have had some digital & literacy skills in order to contact us.

Later on, in the study clients from our National Adviceline Single Queue group who answered a trigger question about exclusion were added to the survey pool.

*Have you been able to get all the help you need by phone?*



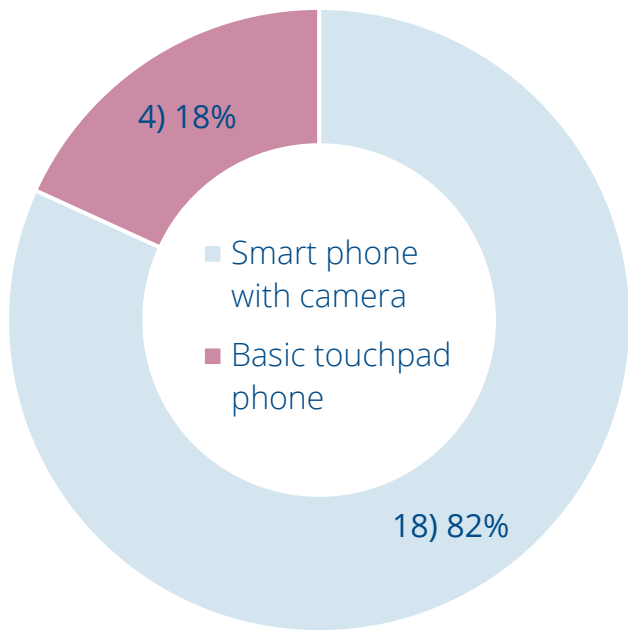
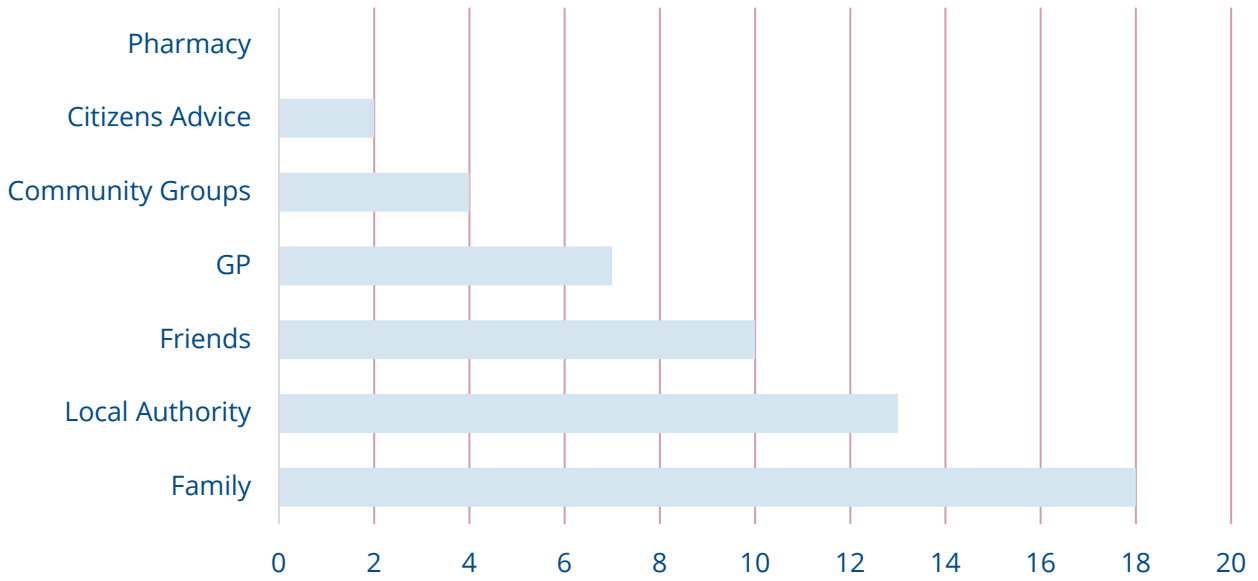
*What would you get from a face-to-face service that you can't get by phone (or online)?*

“Personally, being able to speak to adviser in confidential environment”

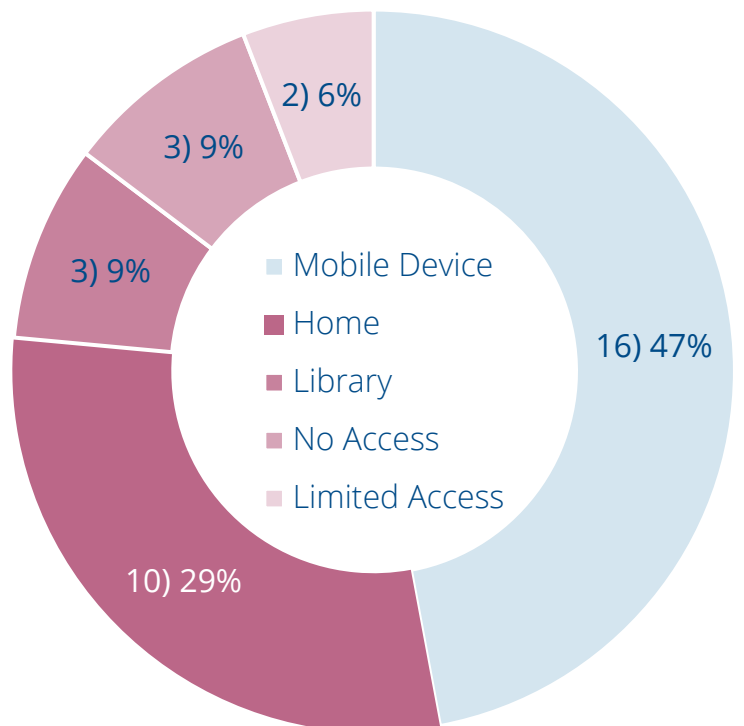
“I need someone to go through the letters with me as I can't understand it well”

“I am used to the face to face with advisor. I can understand it is not possible under current circumstance. But the advisor was able to instruct me what needed done with help of my son. He reassures we could call back anytime if we get stuck which is bit tricky with usual face to face due to limited appointments before”

*Who else in the community do you go to for help with problems?*

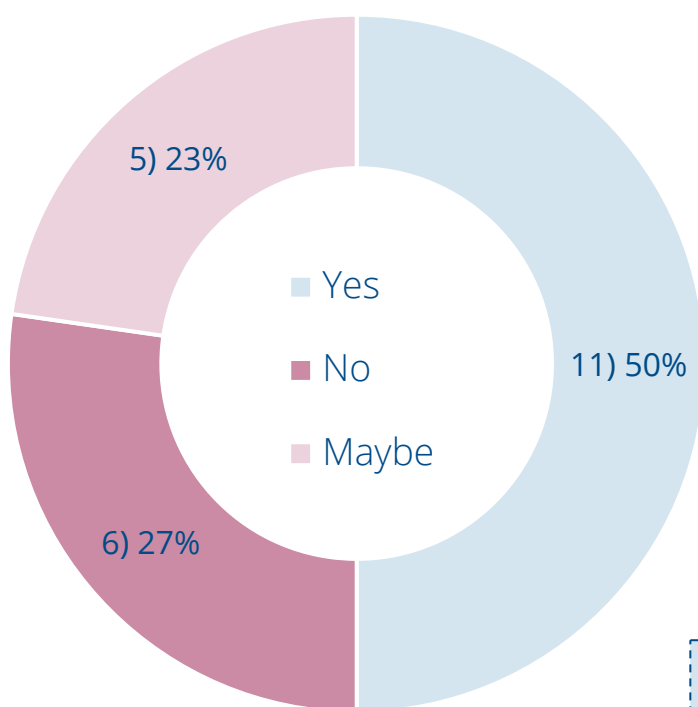
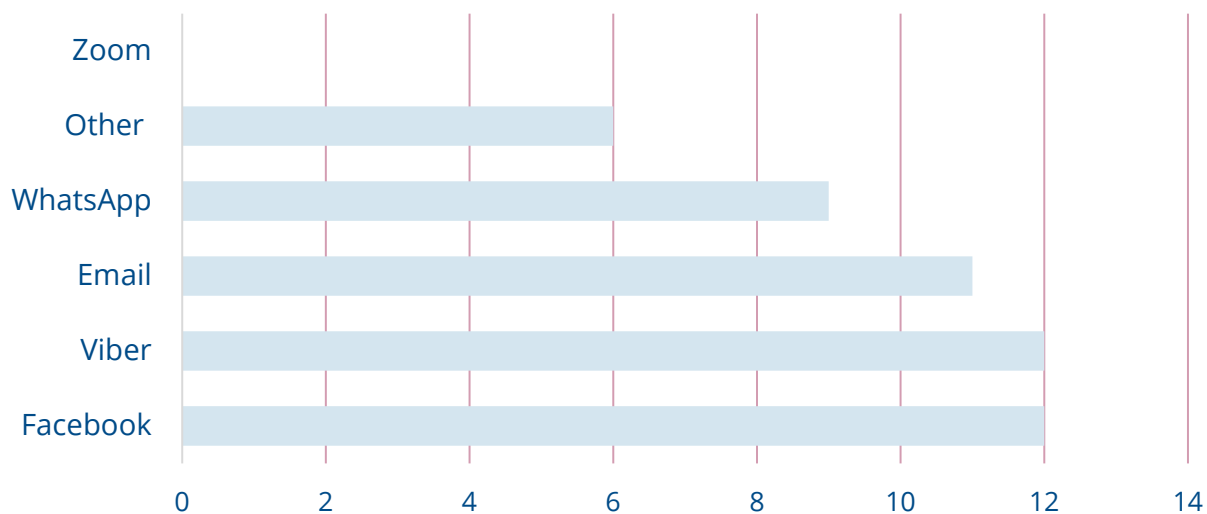


*What sort of phone do you have?*



*How do you use the internet?*

Do you use any of the following? (either for friends/ family or for getting help)



Would you find materials in other languages or formats useful?

Other comments:

“I can get help from a relative who is tech competent”

“Clear understanding and explains your own words which very good to have other languages”

“The person I was talking with was very good spoken, understanding and advised me for my next stage”

“Used the Viber app to read letters”

# Community group survey

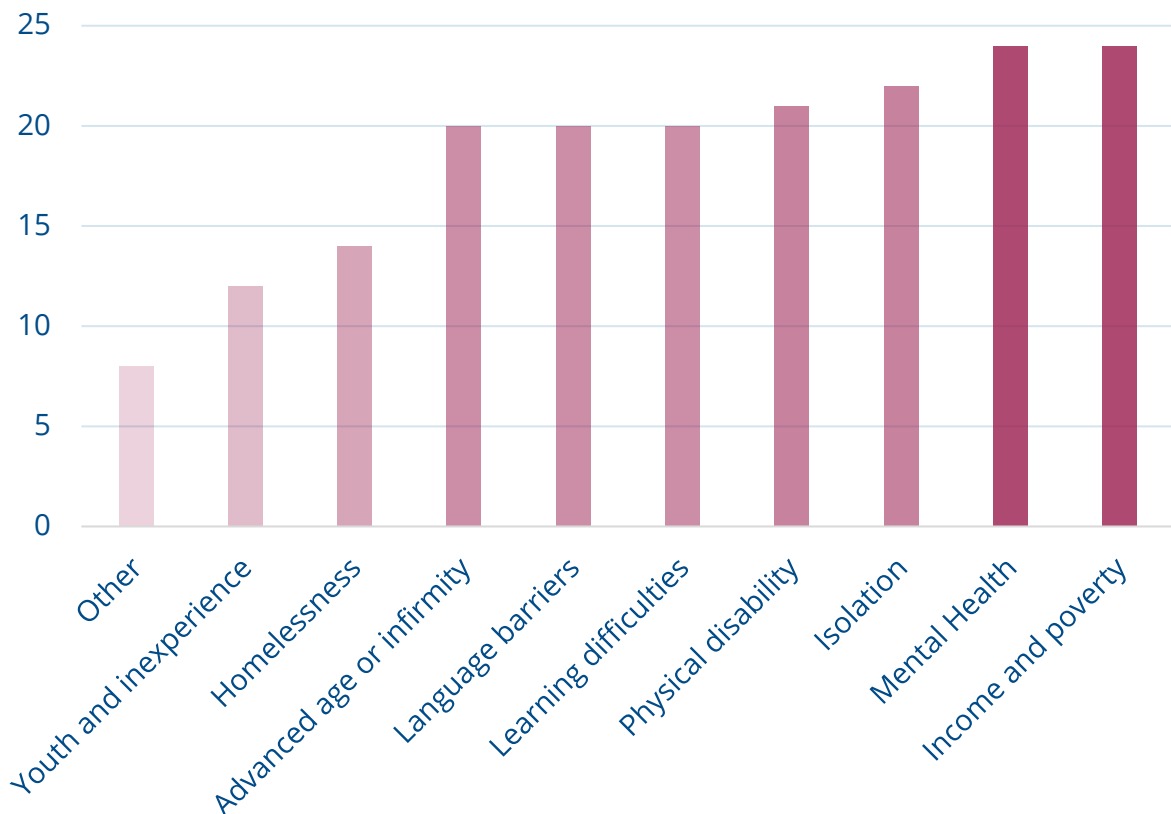
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Our second and largest survey was to reach out to our pre-existing community partners to understand:

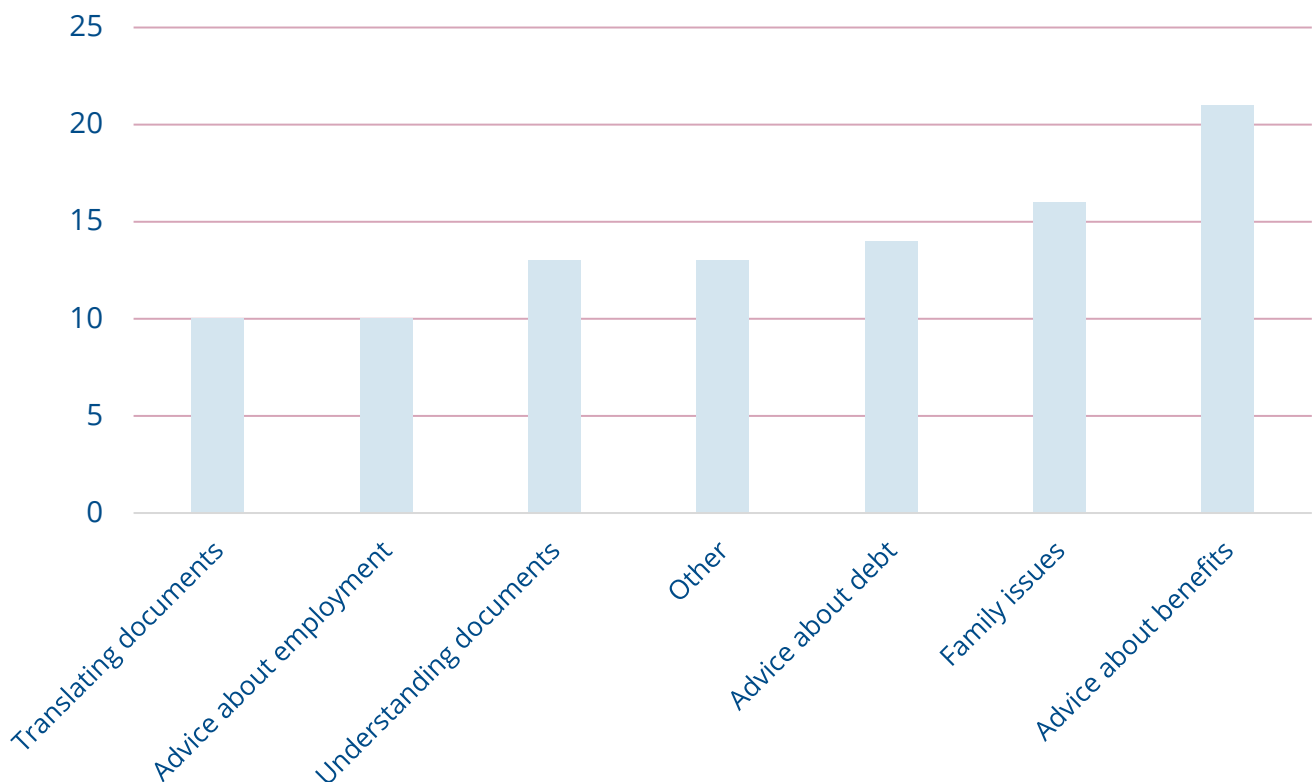
- How they were operating in the Covid-19 environment
- Were they in contact with clients who they felt were vulnerable or excluded
- What help they were being asked for that was out of their scope but could be within ours
- How they thought we could best help them, help the vulnerable to access our services

100% of organisations taking part reported they are dealing with people they would class as vulnerable.

*What do you believe makes them vulnerable?*



*When in contact with people are you asked for information or help that you feel is outside of your immediate scope?*



"Yes sometimes. They ask about benefits system, how to apply etc. We normally signpost them to Citizens Advice"

"Completing Forms"

"Yes, we regularly signpost people to other community and voluntary sector organisations"

"Yes, we do a lot of signposting, including to Heathlands CAB - we are always very grateful of your expertise"

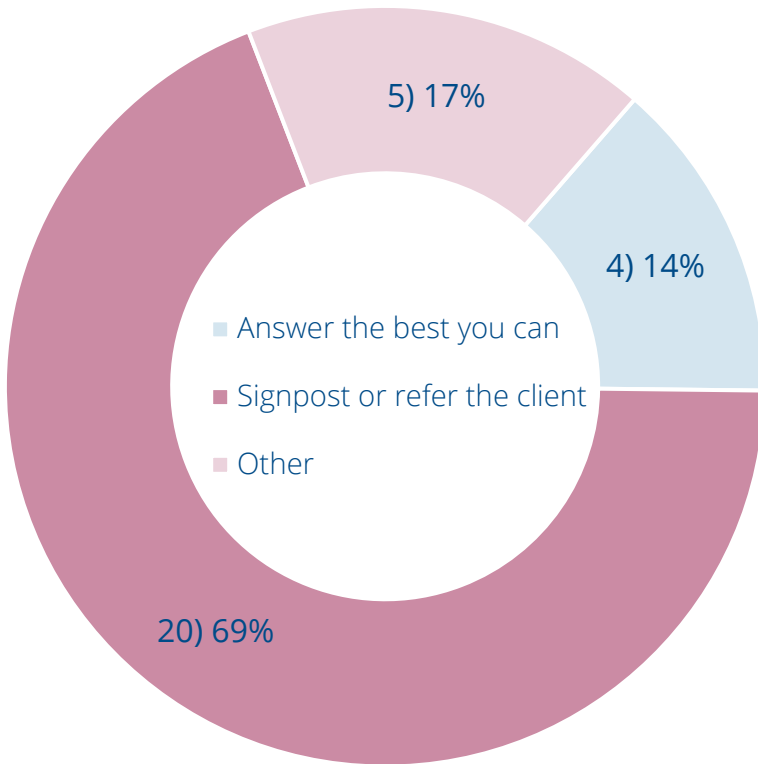
"I don't know much about benefits, but I refer to CAB in those cases as I feel that you are better placed to help them."

"Sometimes but we have members of the club who can usually point them in the right direction."

"Yes, in regard to housing, mental health issues, language translation"

"Yes. I would suggest that in most people we see for Housing Benefit and Council Tax, they all need some signposting to other agencies."

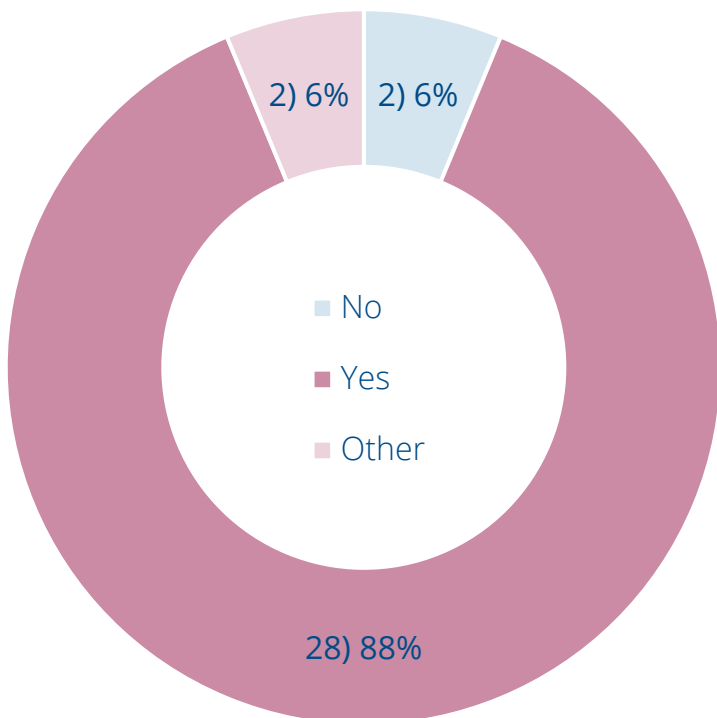
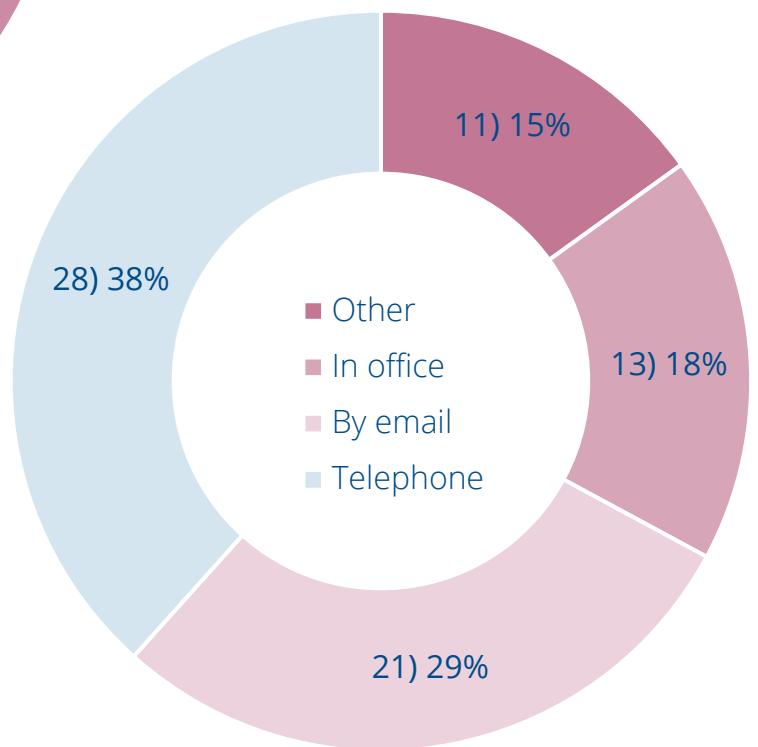




*How do you deal with these issues that are outside your scope?*

*"Use contacts who can assist"*

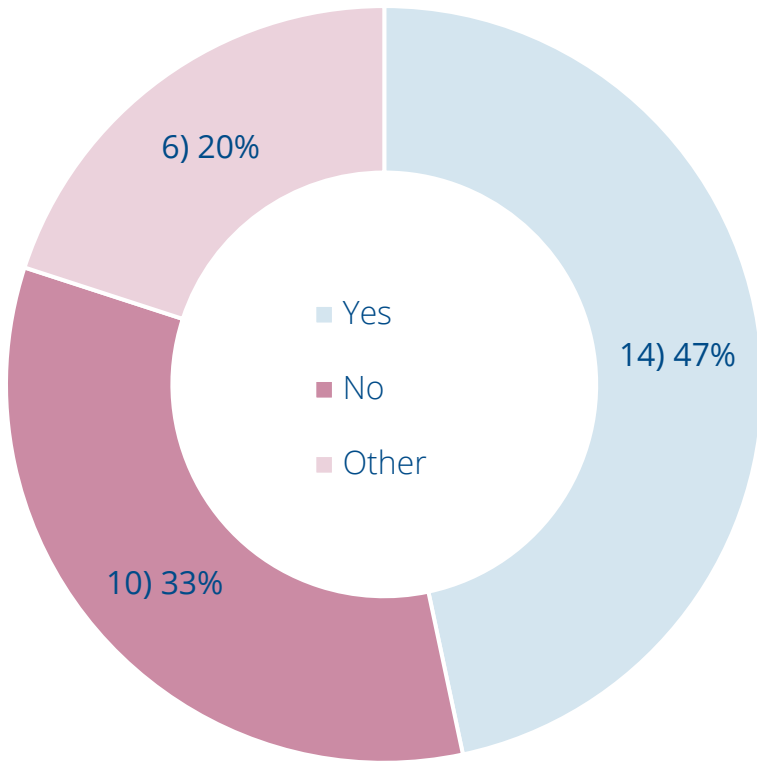
*How does your organisation contact people and how do they contact you?*



*Do you encounter people who do not have access to the internet?*

*"But majority of our customers are not digitally excluded"*

*Do you encounter people who have no easy access to a telephone or mobile?*

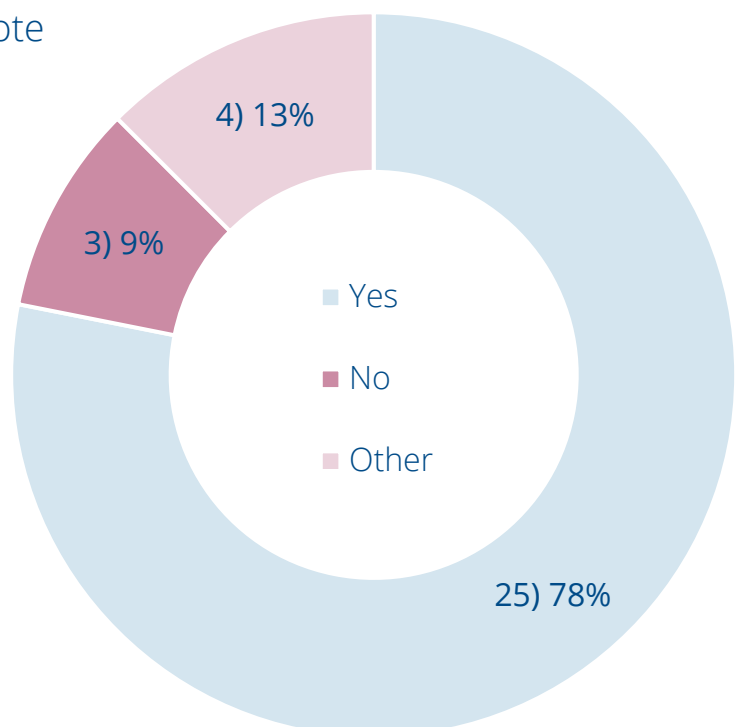


*“Sometimes a person affected by dementia can no longer use a telephone”*

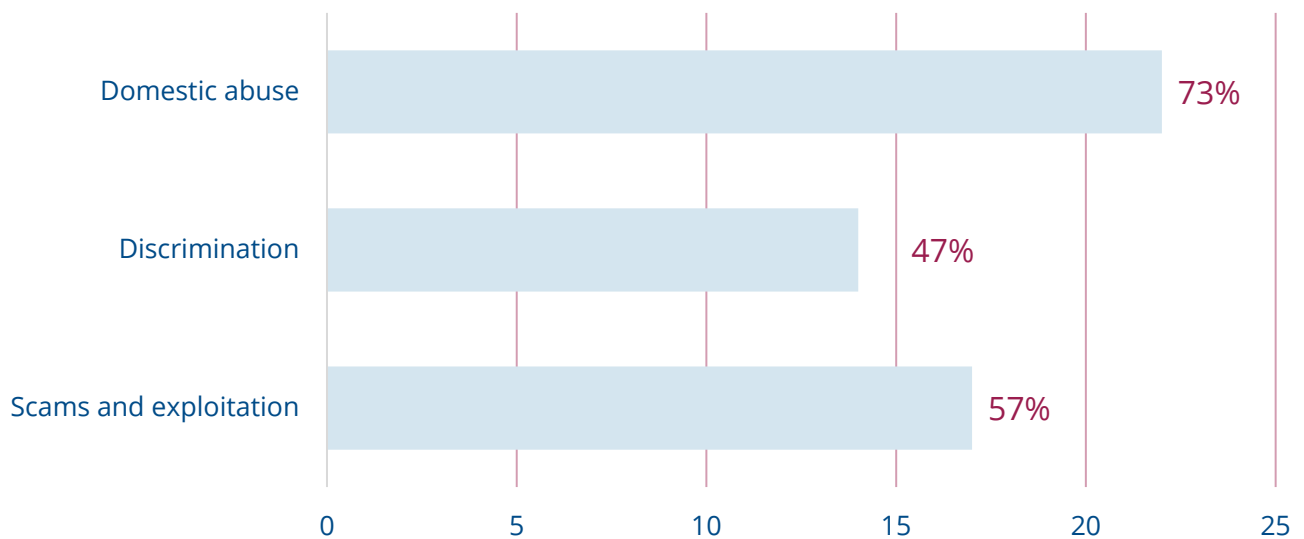
*Do you encounter people who are experiencing language or literacy barriers to accessing help from others?*

*“Covid and the change to remote support has made this more of an issue”*

*“70/30 have issues – and need support”*

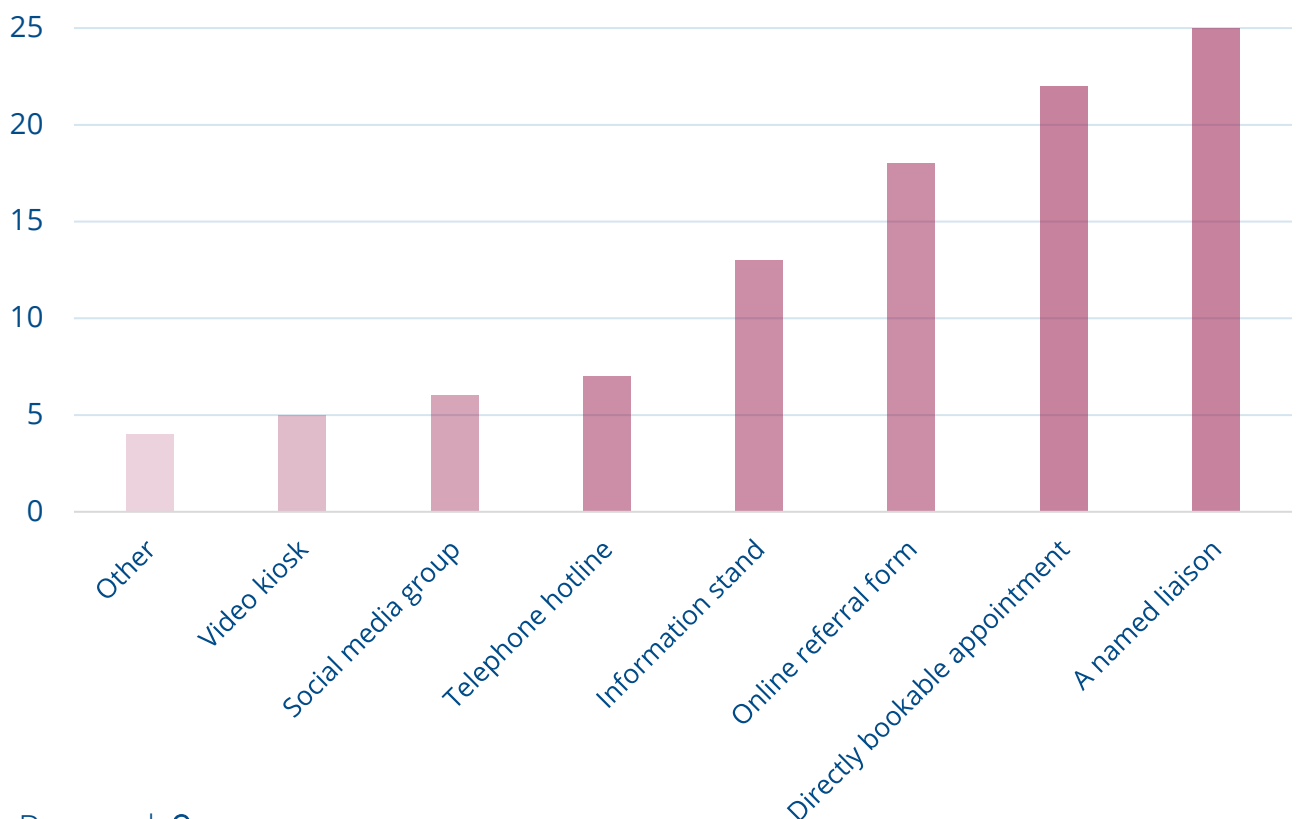


*Have you met people who have expressed concern about any of the following issues?*



29 out of 30 respondents said they might or would need further help from organisations like Citizens Advice.

*If yes or maybe - which of the following sounds like a good way for us to reach your clients who need help with advice issues:*



*Is there anything further you would like to share on behalf of your organisation on 'barriers to advice' and vulnerable clients?*

"We have been organising "teams meetings" it would be great to be able to use something like that. We really want to increase links for the best outcomes for our customers"

"When it's not face-to-face, it's hard to deal with forms/documents - Hard to those people who have hearing difficulty. Few calls received from clients about not being able to get in contact with CA quickly"

"As a Nepali speaking staff, I support many Nepalese clients on our service. We have seen that Nepali clients' worry about their confidentiality. As mental health is largely stigmatised, a lot of people are reluctant to seek help. A few people have refused my service as they feared that a Nepali staff might leak their confidential information to other Nepalese people. This also prevents them from talking honestly about their mental health with respective professionals. There is a strong need to inform people that confidentiality is taken seriously by the services"

"Often clients are reluctant to contact CA directly as they feel there are barriers to being able to be seeing someone in their community such as pointed to advice online or use of national number. With current social distancing it is more difficult to support a client to view and access your online information remotely. We would normally sit with the client and help them navigate"

"If you could, make more staffs available every day to access these peoples at any time they need advice"

"A one day, or half Day training session for us to get to know all the advice points/information that you can offer to vulnerable people"

"People need advice on severe poverty, when we are at the end of how we can help financially, people need help to put food on table, sometimes begging for money. Also, mental health issues, a lot of systems are in place but sometimes they are out of the door and down the road before we can trigger them"

# Participant Community Groups or Partners

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Homegroup (Previously Stoneham)  
Farnborough Primary Care Network  
Community Mental Health Teams (CMHRS & EIIP)  
Home-Start Hampshire  
Chautari Group  
Greater Rushmoor Nepali Community  
North East Hampshire and Farnham CCG  
Surrey Heath CMHRS  
Family Action  
NHS  
Family Action  
Gurkha Welfare Advice Centre, Aldershot  
NatWest Bank  
Recovery College  
Shiva Cultural and Community Centre Aldershot  
Step by Step  
Sanctuary Housing Association  
Farnborough Rotary Club  
Community Mental Health Recovery Services  
Parity for Disability  
Rushmoor Borough Council  
Alzheimer's Society  
Andover Mind (H&R Wellbeing Centre)  
United Muslimah  
Rushmoor borough council  
VIVID  
Maddhat Shamhat (Nepalese Help) & (EGNA)  
Henry Tyndale School  
Princes Gardens Surgery  
New Testament Church of God

# Adviser team survey

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## 1. How are you adapting advice for clients facing digital barriers?

"Sometimes printing out forms, post or hand deliver forms through doors, once I left it hanging on a gate post!"

"PIP/MR/Appeals over the phone takes a long time, breaks are needed, I ask clients to put aside "windows of time" for calls and check in with clients before telephone appeals to talk through niggles or worries."

"Bringing people into office who genuinely can't cope using video calls it's labour intensive (lots of sanitiser) but we are doing it."

"Use family email addresses for useful links, sending pictures of forms over email, Viber, post or dropping in forms."

## 2. What concerns do you have for vulnerable clients who are digitally excluded and how could we work to overcome them?

"Benefits transitioning online, Covid has not changed that but it is just our vulnerable clients can't now drop in."

"Clients may have phones, but no credit. A recent client, with a SSCS1 appeal, he'd phoned and come through on advice line. Adult Social Services spoke to him and said they couldn't help or see him because of COVID19, it was terrible. They just said try again. If he could've emailed them, it may have been easier."

"This is particularly an issue when clients need to claim new benefits, as they may struggle to complete these processes. If clients have been claiming for some time they would likely be set in their ways, and they would know how to manage in that system. Sometimes we do not hear back from clients after we have sent relevant information via email, and it is not possible to determine whether they received it and were able to action it."

# Research & Campaigns evaluation

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## *Research Highlight*

*In our vulnerable client survey 87% of respondents felt they had got all the help they needed using our phone service.*

*In our research with the Adviser & Caseworker Team, they spoke of the challenges faced if clients lack phone credit, and the ability to receive or make calls.*

*Our vulnerable clients, who had felt they hadn't received all the help they needed via our phone service raised confidentiality and difficulty with dealing with paperwork.*

*Our research with the Advice & Caseworker Team also raised these issues - particularly difficulty dealing remotely with forms and letters.*

## *Recommendations*

*Freephone advice service targeted towards our most vulnerable clients during COVID19 Pandemic.*

***Action taken by Innovation Lab:*** 500 bus headrest stickers to be released across Rushmoor Stagecoach bus routes advertising our freephone helpline numbers.

*Explore new ways of dealing remotely with paperwork for vulnerable clients.*

*Include a message within our telephone advice that addresses confidentiality concerns with alternative options available where needed.*

***Action taken by Innovation Lab:*** Viber and instant messaging apps are being used to enable clients to "show" their paperwork. Early results show increased training support and awareness is needed.

*Targeted training for vulnerable clients in digital skills to deal with paperwork e.g., a series of simple "How to..." videos in Nepali.*

*In our vulnerable client survey respondents most frequently said they turned to family, the local authority and friends for help with problems.*

*82% of our vulnerable client survey said they had a smart phone.*

*50% of our vulnerable clients however did not have access to the internet at home, relying on mobiles, the library or not using internet.*

*("Using top up cards so limited internet and experience with internet or technology")*

*15 out of 23 (65%) vulnerable clients used instant messaging platforms (Viber, WhatsApp or both).*

*Over half of those surveyed used Facebook, half used email.*

*Half of our vulnerable client survey respondents said it would be helpful to provide materials in other languages or formats.*

*Raise awareness of our ability to support vulnerable clients successfully via our freephone advice service. Local campaigns on social media and press – so family and friends know we are providing tailored help.*

*Strengthen our referral process from Local Authorities and other local community groups.*

*When we share information with vulnerable clients understand the limitations of internet access over the phone.*

*These include:*

- *Data limits*
- *Suitability of webpages*

*Explore ways to provide free Wi-Fi across Rushmoor for people relying on their phones for internet use. Locations for local free Wi-Fi points could include parks, shopping centres, Princes Hall theatre.*

*Support connectivity innovation projects and national campaigns for universal access.*

*Provide basic skills training for Wi-Fi with vulnerable clients so they can make use of this facility.*

*Target support and awareness campaigns to these platforms for vulnerable clients.*

*Build on digital skills being developed via messenger apps and social media platforms, with basic digital skills training*

*Continue to provide materials to clients in a range of formats and languages.*

*Campaign for simpler IVR messages on national helplines.*



All community groups surveyed supported vulnerable people in Rushmoor with over 80% attributing vulnerability to income, poverty and mental health.

3 in 4 community groups saw vulnerable people facing isolation, 2 in 3 facing physical disabilities.

9 out of 10 organisations encountered people without access to internet.

1 in 2 organisations encountered people without access to a mobile phone (even if only occasionally).

Over 90% of community groups reported they were asked questions outside of their immediate scope.

Over 2 thirds were asked about benefits, over 50% had been asked for help with family issues and 1 in 2 about debt.

28 out of 29 organisations felt they could benefit from increasing links with advice organisations.

3 out of 4 thought a named liaison would be a good way to contact us.

Over 2 thirds favoured directly bookable appointments, 3 out of 5 an online referral form.

Concerns were raised by some organisations about "getting through to Citizens Advice".

Our advice and case worker team research raised the length of time telephone advice calls can take. Especially when completing complex benefit forms, appeals and reconsiderations.

Work collaboratively with local groups in Rushmoor to provide unified support to vulnerable and digitally excluded clients in our community.

**Action taken by Innovation Lab:**

- Steering group - community groups – overcoming barriers to advice

Strengthen or increase referral, signposting routes with local community groups.

**Action taken by Innovation Lab:**

- Postal mailing shot to local partners detailing our new freephone advice number, our online referrals form via our website and work on a new online booking system.

Investigate option of providing a named liaison for local community groups to target effective referrals (could be on rotation to help with resource demands).

Ensure extra timescales are built in for clients facing digital exclusion. Explore what extra help may be available to vulnerable clients to provide support with this process (e.g., befrienders).

*It was described as an intense and tiring experience for both advisers and clients.*

*Advisers highlighted the sometimes very negative impact on outcomes for digitally excluded clients, when:*

- clients face digital barriers and delay to dealing with their issue across multiple agencies*
- there is a delay to us receiving, processing and accessing paperwork during COVID 19 pandemic*

*Concern was raised for our 'regulars' - vulnerable face-to-face clients who we are not seeing during COVID19 pandemic.*

*Fear expressed there may be a build-up of problems for clients while we are on hold during COVID 19.*

*The research was well supported across local community groups, vulnerable clients and the Citizens Advice and Caseworker Team.*

*The combined working approach of Research and Campaigns and Innovation Lab team has been successful, allowing early research results to be quickly fed into action.*

*Link into national campaigns during COVID 19 to improve outcomes for our clients.*

*Basic digital skills and training for vulnerable clients to help them manage their lives and overcome barriers.*

*Reach out to 'regular' pre-Covid clients with a Rushmoor CA check-in.*

*Consider an awareness campaign – "don't put things off... what can you do today?"*

*During continued turbulence of Covid 19 Pandemic, Brexit transition and recession build on joint working and approaches that support innovation to meet the needs of our local client community.*

### Next steps:

We are preparing a customer experience project to undertake in depth interviews with clients over the year, to understand better the barriers and issues faced in accessing help from us. We have recruited 3 volunteer experienced social researchers, who have prepared screening questions, identified clients from different demographics and advice issues, for a good cross section. We will be taking the community champions programme forward and looking to put into practice other recommendations from the research report. We will continue to have monthly meetings of the partnership steering group, to test and learn, share best practice and new ideas.

# Citizens Advice helps people find a way forward.

We provide free, confidential and independent advice to help people overcome their problems.

We are a voice for our clients and consumers on the issues that matter to them.

We value diversity, champion equality, and challenge discrimination and harassment.

We're here for everyone.



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