

AdviserNet and Adviceguide

Abstract: This article by Paulette Storey describes the sources of information produced by the central Information Department of Citizens Advice. They are available to advisers, many of them volunteers, working in the various local bureaux across the country and dealing face-to-face and on the phone, with a huge variety of enquiries. Paulette explains how the databases are structured, their content and how the information within them is written and obtained.

Keywords: databases; general public; advice services; online services; legal information; access to justice

Introduction

I've found a dolphin on the beach – what do I do?

As an adviser in a Citizens Advice Bureau (CAB), during the course of the same day you might be asked for help from a client with thousands of pounds worth of debt, from another facing eviction from their home, and from someone else who has just been dismissed from their employment. The Citizens Advice Information Department has to make sure that it provides information to advisers in the Bureaux, as well as the general public, that can meet all these needs and many more.

Until as recently as 2005, the Citizens Advice information system was in paper format, taking up some seventy plus ring binders. An updating pack was sent out every month with replacement pages and instructions to amend the text by hand. This has now been replaced by AdviserNet, a comprehensive and online information system for Citizens Advice Bureau advisers and other advice agencies. Citizens Advice also produces Adviceguide, a free public information website.

Both AdviserNet and Adviceguide are web based information systems, and AdviserNet is also provided in CD Rom format. The online version of AdviserNet is currently available to bureaux only and the CD is available to other subscribers and used by bureaux as a back up, or for outreach work where an internet connection is not available. Adviceguide is freely available to anyone at www.adviceguide.org.uk.

Content

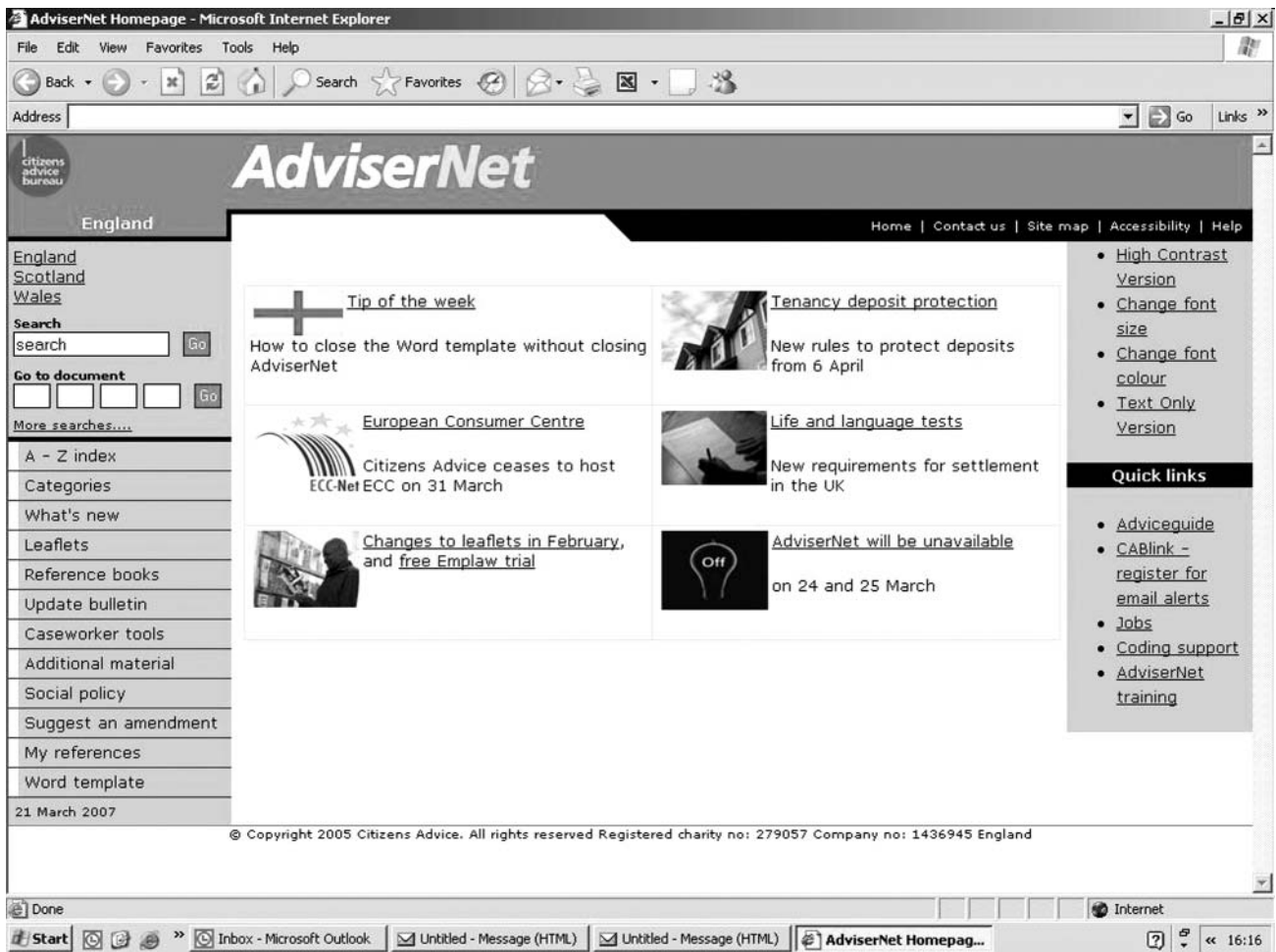
The bulk of information in AdviserNet is written by the CitA information department (advice documents), or is third party material which we include with permission from the publishers. This is the material which is used on a day-to-day basis by generalist advisers in face-to-face

interviews or on the telephone. In addition, there are specialist materials aimed at caseworkers, including summaries of cases and links to other caseworker tools, such as standard checklists, letters and forms to be used in discrimination casework. By means of alerts on advice documents, advisers are reminded of areas where Citizens Advice is collecting evidence for its social policy work. The information in AdviserNet is supplemented by a range of reference books supplied to subscribers as part of their subscription: for example, *Police Law*, *Magistrates' Court Guide* and *Whitakers Almanac*. These books are referred to from links in advice documents, the A-Z index and Search, the link taking the user to a page with brief information about the book.

Adviceguide covers a similar range of subjects to AdviserNet but, as it is designed to be used directly by a member of the public without the aid of an adviser, the level of content is determined accordingly. It includes standard documents as well as a range of factsheets in pdf format, designed to be printed out and Frequently Asked Questions. Some of this material is also available on the site in a range of other languages (Bengali, Gujarati, Punjabi, Urdu, Chinese, Arabic, Polish, Russian, Lithuanian and Portuguese).

A content management system (CMS) was introduced in 2005 to manage the content of AdviserNet and publish to the website. In addition to the standard CMS functionality, there are some bespoke tools, which enable us to manage and produce an A-Z index and record sources for all our changes. This CMS is used by Citizens Advice for all its websites, promoting the development of knowledge and expertise in its use across the organisation.

The online version is updated continuously and each month a replacement CD is issued. There are hundreds of amendments every month. A change might be the simple addition of a figure in a tax table, an update of some existing content (for example, rules have recently changed on the recovery of tax credit overpayments), the complete rewrite of a topic (for example, the information to support



debt advice, taking into account current practice), or brand new content (for example, on the age discrimination legislation which was introduced in October 2006).

Information Department

Content development and updating is the responsibility of the Citizens Advice Information Department. The department has a mixture of full and part-time members of staff - just fewer than thirty in total. Specialist teams within this department focus on writing, editing and information management, with administrators and web assistants carrying out the technical and administrative tasks, and managers taking a strategic role.

The team of writers has responsibility for writing the information which appears in both AdviserNet and Adviceguide. These writers are appointed for their skills in quickly assimilating complex material (such as primary legislation), interpreting it and writing information in clear English for use by CAB advisers (many of them volunteers). A small number of the writers have a legal background, far more have experience of giving advice in a CAB, or other advice agency, and therefore understand the needs of advisers and the pressures under which they operate.

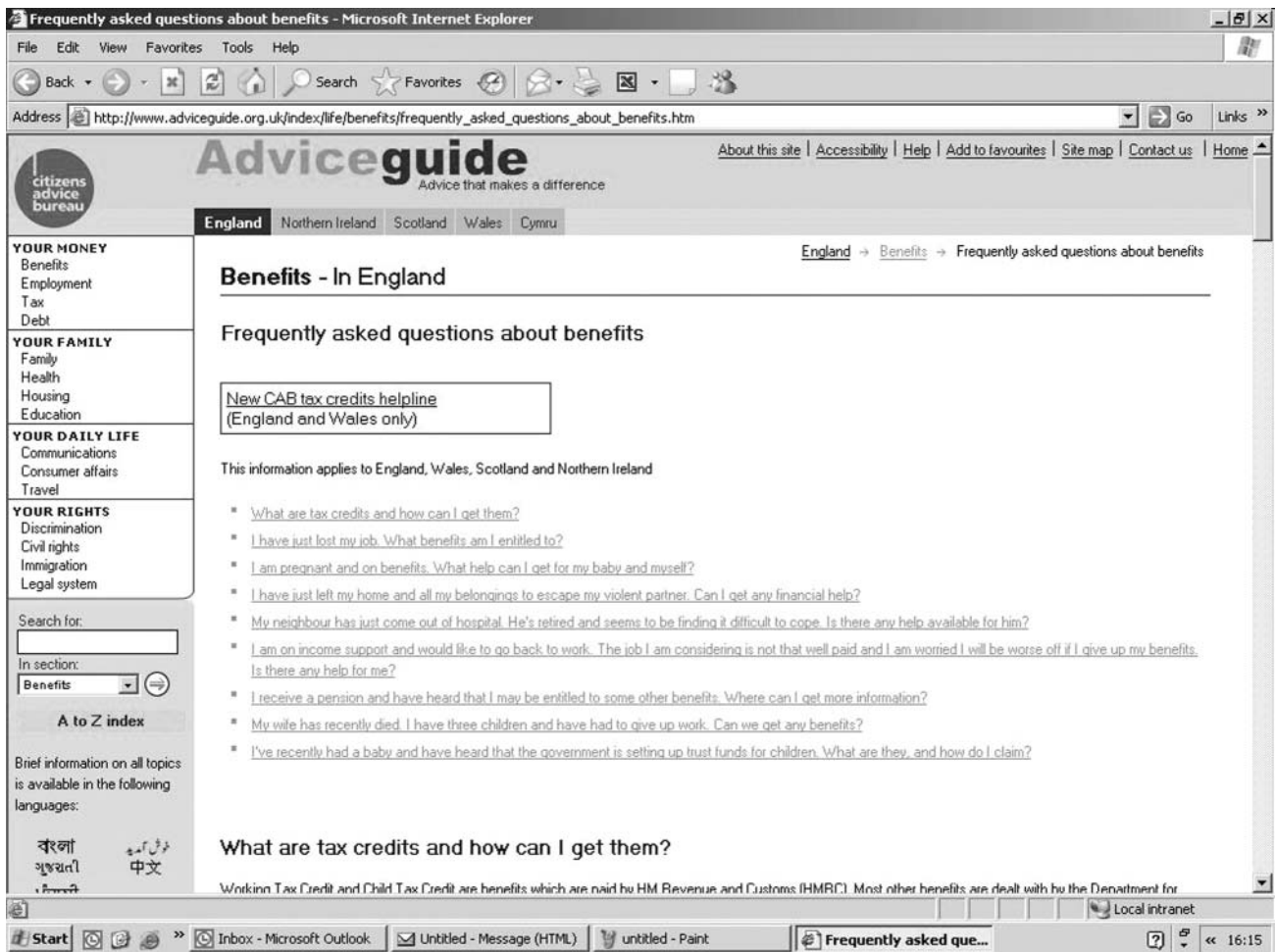
In an advice session, the adviser, who will have completed standard training and who is supported by an

advice session supervisor, will typically be helping the client to explore the problem, consider what outcome they want, analyse the options available, and decide on action to be taken potentially by both the client and the adviser. The AdviserNet material is written to support this process and may include both factual and tactical information.

AdviserNet is an integrated information system, with references throughout to other topics which might be of relevance. For example, information on debt advice will alert the adviser to the need to check that clients are maximising their income, and refer to the information on benefits and tax credits.

Given that resources are limited, we cannot write on every subject and must prioritise. Where there is useful material written by a third party, we may include this in AdviserNet. For example, we have included on the site a pdf of the leaflet from the Information Commissioner's Office on how to stop unwanted marketing materials. In this case, we will make this available via a standard front page with a link to the pdf. In other subject areas, we may link to a relevant website or refer to a recommended specialist organisation.

There is a different focus for the publicly accessible Adviceguide. Here, care is taken to differentiate between straightforward information and areas of complexity, where an enquirer would benefit from seeking help from an adviser.



The writing team work in small groups of two or three, taking responsibility for specific subject areas. It is their responsibility to ensure the information system is accurate in their subject areas. They keep up-to-date and monitor forthcoming changes by consulting and subscribing to a wide range of materials, including online legislation and case law databases, government press releases and guidance, email groups and newsletters and a wide range of websites, the daily press, books and specialist journals. We maintain a small library in the department, which includes hard copies of the main reference materials in our subject areas, such as *Woodfall on Landlord and Tenant*, *Harvey on Industrial Relations and Employment Law* and *Clarke, Hall and Morrison on Children*.

Controlling the quality

Our definition of quality includes timeliness, accuracy, relevance and usability of information and ease of retrieval.

Accuracy is ensured by using reliable and authoritative source material and by getting information checked. We work with various government departments who review draft material and comment on it. We also work closely with many specialist organisations, including Child

Poverty Action Group (CPAG), Shelter and the Joint Council for the Welfare of Immigrants (JCWI), who all contribute to both the accuracy and relevance of our material.

One of the real strengths of the Citizens Advice service is the information reported back to us by the individual bureaux, about the advice they give to clients. When the same issues are being reported across the country (for example, problems with exploitation of migrant workers), this evidence is used by Citizens Advice in its campaigning work on social policy issues. These reports are also used by the Information Department to help ensure AdviserNet and Adviceguide contain information which is relevant to the current needs of clients. Citizens Advice collects a range of statistics from bureaux, including client profiles and issues on which they have given advice. We know, for example, that 30% of clients received advice on benefits and tax credits and 22% received debt advice in the 2005–2006 financial year. In addition, individual bureaux are asked, and are always keen, to review draft material and submit their comments on its relevance and usability.

An in-house team also reviews the material, checking and adjusting its structure, ensuring consistency of terminology, clarity and relevance of references, and its usability as a web-based information system.

All changes to the content of AdviserNet are reviewed and approved by editors, who ensure compliance with departmental writing and layout guidelines.

There is an online feedback facility on AdviserNet which bureaux use to send in feedback and suggestions. In addition, all members of the team carry out a number of visits to bureaux each year, in order keep up-to-date with current advice practice and procedures and get feedback on AdviserNet.

On both AdviserNet and Adviceguide, our aim is to give a range of options for users seeking information and we therefore provide a search tool (powered by Ultraseek), an A-Z index and a subject category option.

A team of information management specialists is responsible for ensuring quick, precise and relevant retrieval. All changes to content are reviewed by this team, who manage the metadata which supports the search using our in-house thesaurus. This team also maintains the A-Z index, which is a key tool for many users, and the taxonomy used to classify the information.

Material on both websites is organised using our in-house taxonomy, the top level categories of which are as follows: 1 Communications; 2 Travel and Transport; 3 Immigration and Nationality; 4 Administration of Justice; 5 Education; 6 Employment; 7 National and International issues and Human Rights; 8 Family and Personal; 9 Welfare Benefits and Tax Credits; 10 Health; 11 Housing, Property, Land and Environmental issues; 12 Tax; 13 Consumer issues and debt; 14 Leisure. This three tier classification scheme is used on the AdviserNet website to give unique numbers to the advice documents used by advisers and has almost become a language in its own right. For example, it is not uncommon in the department to hear someone refer to 'the sixes' when they are

talking about the employment information (or when they are referring to the writers who are responsible for the employment information).

The A-Z is a two tier tool, with headings and sub headings. The principle of the A-Z is that users are directed to the point in AdviserNet or Adviceguide where they should start to consult the information to deal with their query. The compilation of the A-Z therefore relies on the indexer's knowledge of the information system and how the various documents work together.

Conclusion

In a short period of time, AdviserNet has become an indispensable tool for local Citizens Advice Bureaux. It is now used by over 17,000 advisers, many of whom are volunteers, to advise around two million clients a year with one or more new problems. In addition, it is used by almost 700 other advice agencies

Adviceguide is currently the most used website in the advice services sector, with year-on-year usage having grown at an average rate of 50% since Spring 2003. The website is set to achieve just over six million visits for the year 2006–2007.

What to do with that dolphin

An adviser using AdviserNet would be able to advise the client in seconds to report the find to the local coastguard, as a dolphin is Crown property.

Biography

Paulette Storey is currently Head of Information (Infrastructure) at Citizens Advice central office. She has been at Citizens Advice for a number of years, previously working as both a writer for the CitA information system and an information management specialist. She has a postgraduate qualification in Information Studies and Librarianship from (what is now called) Manchester Metropolitan University and previously worked as an Information Officer for a regional charity in Manchester.