

## Case study: Citizens' Advice Manchester

### Building trust and delivering value to people and organisations through facts and evidence

Citizens' Advice Manchester (CAM) is one of 280 independent charities under the Citizens' Advice banner. They offer free information and confidential advice on a wide range of subjects, including money, renting, access to benefits and legal support. CAM helps 60,000 to 70,000 clients across the Greater Manchester area every year, with a team of 150 people made up of paid staff and volunteers.

Chief Digital Officer, Stuart, has been working at CAM for 17 years. Although he has an understanding of data, he does not have a 'traditional' data-analysis background. He says:

"One of the challenges that is probably replicated across the voluntary or social sector, particularly around data and for small and medium charities, is we often don't have the luxury of having our own dedicated data analyst or data scientist."

CAM's Contact Centre Team, whose main role is to help people with issues over the phone, sits on a very rich dataset. They take about 48,000 calls per year, recording information such as 'purpose of call', 'help provided' and 'call length', along with some very granular data on things like demographics and information about the issues people are presenting with. They also collect direct feedback from clients about the service they received.

Stuart understood that this information could be put to more use – for delivering reports to funders, to help improve their service delivery, and for campaigning and lobbying activities:

"Like a lot of charities, we...are looking to better understand our data and how we can use it to improve our service. I found Open Data Manchester surgeries a great help. It provides a great jumping off point as you start on your data journey. They helped with what useful data is out there and could help us, providing some insight into what to look for and what tools are best for getting started."

They also used a tool to complete a data maturity assessment, which helped them to get a better picture of where they were on their data journey, and showed them where they needed to improve. By including managers and trustees in this process, they were able to see the value of having an organisation-wide approach to understanding data and how it might be used.

Working with a volunteer who had some data knowledge, they pulled together some of the datasets that showed the potential of what they had. The idea was to make the Contact Centre Team's data available to the whole organisation, including the staff and volunteers who handle the calls.

A vast array of data has now opened up to the team in an easily accessible format and managers have been able to make more-informed decisions, more quickly. Using their new insight, the team was able handle a 12% increase in calls during 2019, without the need for additional staff.

It wasn't all plain sailing, however. With such detailed analyses of data, there was some resistance due to a 'big brother' perception, where staff and volunteers felt the data was being collected to keep watch on them. One of the ways they overcame this was to use the data in the creation of the team's KPIs. The whole team was able to take part in these discussions. Whereas previously, the figures might have felt somewhat arbitrary, they were now being based

upon the information derived from the data. This, coupled with the increase in number of calls handled, fostered greater trust in the way the data was being used.

Decisions are now made based on what the data is telling them, and staff and volunteers continue to be included in performance and delivery-based decisions, which ultimately results in a better service for the people who come to them for advice