**Brief for Digital Transformation Partner for Citizens Advice Bucks**

**Background**

Citizens Advice Bucks is a newly merged charity of three former Citizens Advice Services, creating a county wide advice service that helps well over 10,000 people a year with advice. Our core offer includes projects like:

* Help to prevent tenancies or mortgages from failing, preventing homelessness and helping those who are homeless to secure the help they need to get back up on their feet, or helping with issues between tenants and their landlords
* Pension Wise, which helps people manage their finances in later life
* Extensive help with employment issues, like bullying at work, discrimination, unfair dismissal, or helping people to bring about tribunals for employment issues against their employers.
* Help to claim- supporting people who find online systems or applications difficult, by either walking or talking them through the process, and sometimes helping do the forms on their behalf when literacy or ability to complete them is an issue, often because they are sick or disabled
* Supporting families: Helping advice on process of getting a divorce, death and wills, gender based or domestic violence, supporting families through child abuse, helping people who are fostering or going through adoption process, child maintenance, education and discrimination in education, preventing Female Genital Mutilation or child abuse.
* Money advice service- we provide assistance helping people to manage debt that has created financial shocks in their lives, for example CCJ’s, court orders, insolvency orders, debt relief or bankruptcy advice, help developing budgets or applying for benefits
* Support with applying for blue badges for people with any kind of disability
* Help to people on claiming asylum, or changing their visa statuses
* Supporting carers: Helping carers to apply for benefits, secure support from adult social care and put in place permanent care arrangements
* Consumer problems: Helping people to return faulty products or get refunds for poor services, help with choosing energy providers and support with securing fuel vouchers,
* Healthcare: Help with patients rights, cost of health and lobbying for payment of healthcare provision under NHS, help to complain if something goes wrong with treatment

Our beneficiary end users of our services span a wide demographic; from those literacy poor to those with communication issues, to those who are confidently able to communicate but might have other forms of disabilities like mental health or complex needs. Some of our beneficiaries have complex disabilities and a portion of our service users are digitally illiterate and over 70. We help people from aged 18 upwards.

**Our goals for our digital transformation**

During Covid-19, we haven’t yet fully embraced digital in ways that other organisations may have because of the crisis running in parallel to our merger. However, we have opened an AdviceLine, webchat and email advice line which has been successful to a degree. However, we have seen a drop off in both the number of clients and some of the vulnerable clients we would usually expect to see. In the next phase of our work, we would like to determine ways to support our clients as set out below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **One to many**  How can we help multiple clients at once with advice where this is relevant and their needs are low. E.g. Group calls, video lives on social media | **One to one digital face to face**  Providing video advice and jointly working together through their issues | **Blended approaches**  Providing digital support with some in person follow up, much like doctors surgeries are currently operating | **Online servicing**  Supporting people to find out information for themselves through our digital spaces and get the help they needc | **One to one support**  Help for our most vulnerable, complex needs and emergencies, as well as those with the greatest difficulties communicating |

We know that at the moment; our clients range from the digitally competent to digitally non-competent, and from wanting to actively engage with us online, to being completely unwilling (often even if they are competent to some degree). Many of our beneficiaries feel frightened by form filling and conventional processes.

**Our team**

Our staff team range from those that are highly digitally capable, to people who have few or limited skills. We have recently moved to SharePoint and Office 365 for our internal systems, and we are still in process of adoption and learning. Some of our staff have never worked with Microsoft packages. We employ around 80 volunteers who work as Advisors and receptionists of all ages including predominantly post retirement, which can mean adoption of new technologies can be an unwelcome change, and there is real worry and concern for moving some aspects of our work digital about how this will affect the most vulnerable groups.

**What we are looking for from a digital partner**

We are seeking quotes from prospective partners to help us manage the shift of elements of our services to digital.

* The first element of this is to develop a digital road map and service user design workshops with our staff, volunteers and beneficiaries, to determine which services or aspects of services are equipped with online self-servicing in a phased approach.
* Work with us to develop the look and feel of digital interfaces on our website over time, most likely with an annualised contract to build self help modules and the capacity of our webchat, email support, and integrated and blended learning
* We are looking for a digital partner that can help us make off the shelf software work for us, and help us to evaluate, procure and adapt the software for our use.
* It is important that year one of the project for which we are seeking quotes for would identify costings for future service years and a phased project management cycle that places emphasis on impact evaluation on beneficiary engagement
* It is important that disability, diversity and protected characteristics are taken into account in the design of outputs, focusing on ensuring all resources are accessible to those who are Hard of Hearing, physically disabled, mental health or learning disabled, and that inclusive designs are technically important.
* Has a good understanding of how to motivate staff and volunteers to participate in digital transformation who might not be keen to accept changes and is able to positively motivate and support staff to engage with the change management process.

We are looking for quotations and brief proposals as to a scheme of work to put forward to funders to fund this work as an urgent priority and therefore at this stage we are interested in creating a shortlist of potential providers who can ideally deliver on the entire scope of this work. Experience of developing other inclusive websites, inclusion service design and experience of working with large teams towards digital transformation would be a distinct advantage, and further in the selection process we will need to have references, samples of recent work that must still be in use and you would have to pass a provider selection process.

For more information please contact [anna.day@bacab.org.uk](mailto:anna.day@bacab.org.uk), Head of Development and Communications.