<u>KEY STATISTIC QUARTERLY / ANNUAL REPORTING DASHBOARDS</u>

CANS uses the Citizens Advice national client management system known as *Casebook*. All management information gathered through *Casebook* is analysed and presented using *Tableau*, a powerful and customisable data visualisation tool.

Key Statistic Dashboards are created for the following:

- By Ward
- By Town Council
- By Parish Council
- By Constituency

These reports are based upon the client's postcode and will cover the whole CANS service.

- By Office / Outreach – based upon where the client was seen
- By Project – based upon each individual funder
- By Core Service – based upon clients helped within our Generalist Service
- By whole service – covers all clients helped regardless of funder

Summary

<u>Clients – *How many people have we helped?*</u>

This allows us to look at the reach within the local community and understand what proportion of local people we have helped.

A count of 'unique clients' is a count of individuals helped in each reporting period. Each individual is counted only once regardless of how many times they were helped in that given period. So for example, for each quarterly report you receive no matter how many times we see an individual client in that 3 month period they will only be counted once. However, the quarterly reports should not be used to calculate the annual unique client count. This is because an individual client may be seen in different quarters of the financial year and they will be counted in each quarter. The annual count may therefore be less than the sum of each quarterly report.

<u>Issues – *What issues are clients presenting with?*</u>

Counting issues presented with provides insight into the range, complexity and prevalence of the issues clients are facing. A client may present with multiple issues and each separate issue will be counted in the reporting period.

Analysis of the change in issue mix over time can point towards evolving client need, or provide evidence of the impact of local and national policy change.

<u>Activities – *How are our Advisers spending their time?*</u>

Counting activities recorded by advisers provides insight into workload. The three types of activities that we record are: 1) interactions with clients; 2) interactions with third parties; 3) administrative work on behalf of a client. Client interactions are the most frequently reported activities and we are able to report on channel used: Face-to-face; Adviceline (telephone); webchat; email; and letter.

Cases – What cases are our clients presenting with?

A case is a 'virtual file' collecting the various issues, contacts, outcomes etc. associated with the client's current situation.

Outcomes – *What difference are we making?*

Measuring outcomes helps us to understand and measure the changes resulting from the advice we provide to our clients. Outcomes cover financial and non-financial outcomes.

Outcomes are counted based on the date the Outcome is recorded regardless of when the Issue or Case was created. This means the reported Outcome could be as a result of work completed in an earlier reporting period. The Outcomes reported in the Key Statistics data relates only to financial outcomes.

Channel

CANS helps clients through the following channels:

- Face to Face
- Adviceline (telephone)
- Email
- Home visits
- Letter

Issues

This section provides information about the top issues across all subject areas and more specifically the top Benefit and Debt issues.

Profile

This section provides profile information in respect of age, gender, disability / health, and ethnicity.