

CAB Perth & Kinross and The Support & Connect Approach

Citizens Advice Service

in Scotland



Network of 59 independent Citizens advice bureau.



Charity. Started in 1939.
Perth opened in 1974



Advice delivered by volunteers (30) and paid staff. (32)



Part of what we do is raise social policy issues to drive change where there is unfairness. Campaigns.



Covid changed service delivery and the way clients access the service.



How CAB Can Help

We can provide advice on the following topics:

- Money and debts
- Benefits
- Cost of Living
- Consumer
- Immigration
- Energy costs
- Housing
- Employment
- Family
- NHS Complaints

2024/25

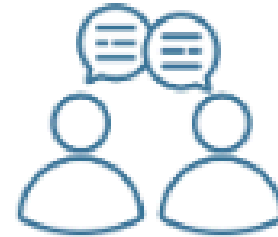
Our Impact



9088
Clients
Supported



30481
Issues
Advised on



33,093
Contacts
with clients



5622
New
Clients



£6,081,104
Total Client
Financial
Gain



£4,717,027
Benefits
Financial
Gain



£1,033,172
Debt
Financial
Gain



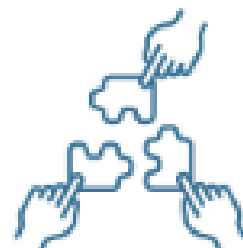
£123,370
Energy
Financial
Gain



£7,958,500
Value of
Debt
Advised on



187
households
Prevented
From Facing
Homelessness



1500
Referrals
to Partner
Services



500
clients
supported
out of
crisis



Our Approach

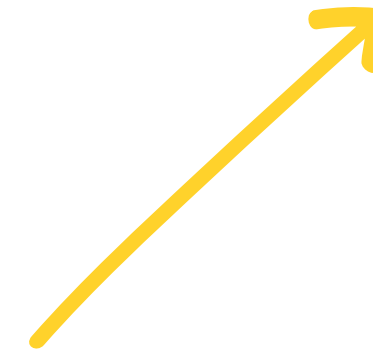
Whole Person
Support - Not just
Financial Relief



Support

&

Connect



Driving structural
change, not
replacing it

Support -
conversations and
social needs
screening

Connect - FORT,
network and the
website/directory

SUPPORT:

- Support & Connect Training - ensuring that services and frontline workers are able to take a **holistic and preventative approach** through accessing pathways to support for clients
- Introduction of the Social Needs Screening Tool and ways to address unmet need tailored to fit within services and their processes.
- Co-designed tool with 66 frontline staff who helped shape changes and improvements to better serve clients
- 97% of over 100 participants said that the training helped to develop their knowledge around the support and help available and how to access and refer to that support.
- More Support & Connect Training to be delivered in the new year, as well as Leadership training to help Leads and Managers to truly embed this into their teams and practices

The Five Pathways



Financial Insecurity



Housing Instability



Personal
Development



Wellbeing



Safety and Security

What participants said:

How do you envision this course impacting the way you approach whole person support in the long term?

- “It means that we have a bigger chance of getting it right for every person and they all get offered the help available.”
- “Building networks of professionals that want to work to develop whole person approaches.”
- “I think that it has helped reinforce the need for a whole person approach at all times.”
- “Being more knowledgeable about services and support and more appropriate referrals.”
- “We are actively working as an organisation to implement this as we realise how important it is.”
- “Knowing that these questions need to be asked even if it is uncomfortable for worker/client.”
- “Easier to identify needs, nothing slipping through the cracks.”

CONNECT:

www.supportandconnect.org

Connecting services to build a Community through the FORT shared referral system and the directory

- **77 organisations/services** engaged in FORT
- Over **380 people** referred
- Increased reach of the FORT shared referral system and **actively receiving referrals** between partners (including locality housing and central arrears, financial inclusion projects with other partners (HEAT for example)
- **Future funding** has been secured allowing the project to continue
- **Building interactive directory** - Support & Connect - merging the Whole Family Support Directory. Allows practitioners to search/filter for and find information that can assist families and individuals with a range of issues - using the pathways on the tool as a dropdown

Types of Support available

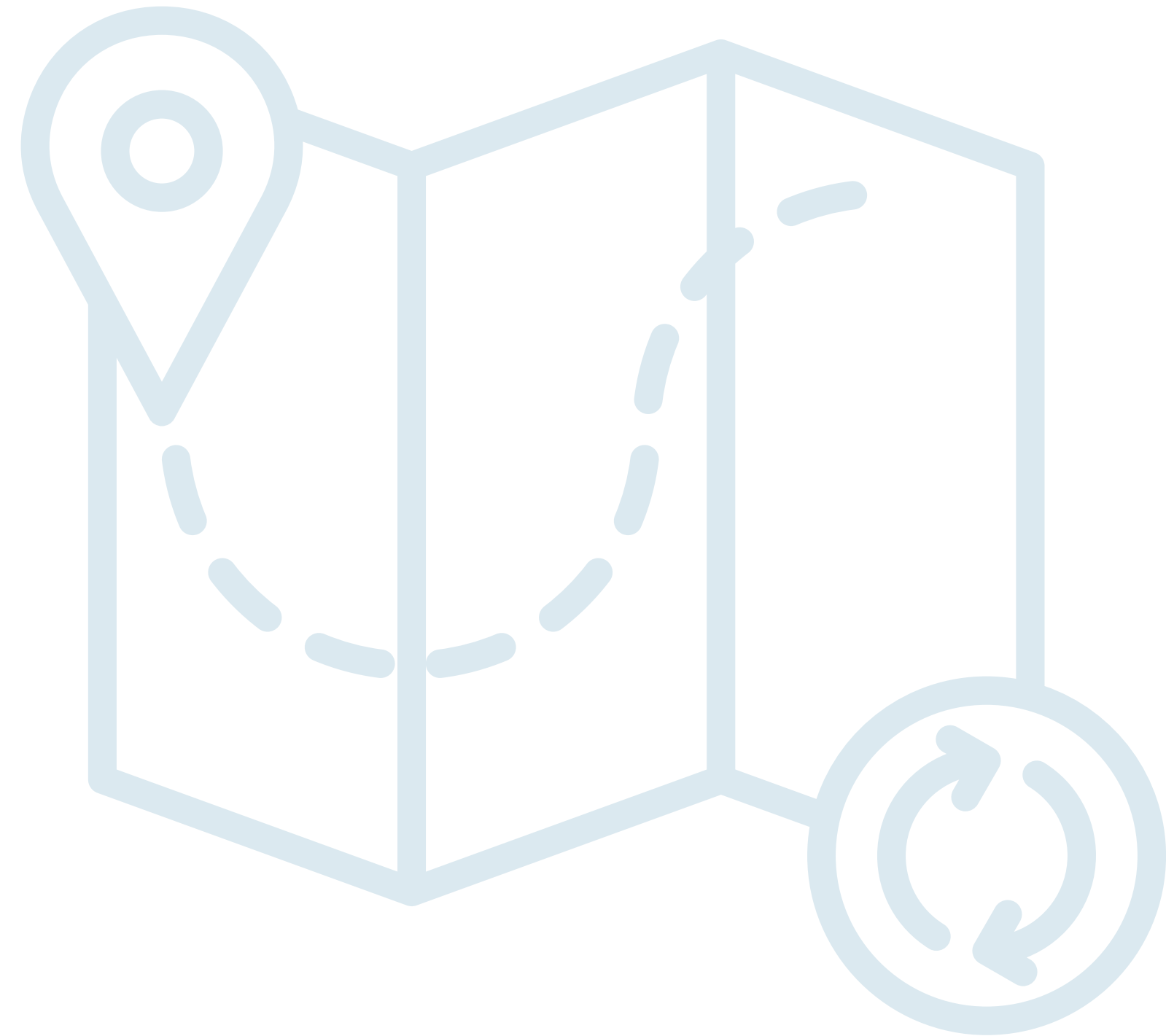


What Partners told us about FORT:

- **Easy to Use & Understand** - Users liked the simplicity and having a standardised referral process.
- **Better Access to Services** - The central directory helps frontline staff quickly find and connect people to the right support.
- **Clear Communication & Visibility** - Messaging tools and email updates keep users informed and referrals on track.
- **Saves Time, Reduces Hassle** - Reduces paperwork and simplifies onward referrals—key for busy teams.
- **Flexible & Future-Proof** - Users liked that the bespoke referral questions could be easily updated/changed and that there is the potential for growth.
- **Encourages Collaboration** - Helps build stronger networks across services and manage workloads more effectively.
- **Support Makes a Difference** - Training and hands-on guidance (e.g., from support staff like Michelle and dedicated project lead Sarah) have been well received.
- **Partners Are On Board** - Organisations are actively embedding FORT into their daily workflows and promoting it internally.

Updates and project development

- **System development and training** is planned for the upcoming year – including an action plan taken from feedback given to us by partners.
- This is all part of a **phased development of the system** that aims to ensure that we are tracking the client journey, as well as learning together and collaborating with partners to build a network and the reach of the system.
- We will also **continue to work closely with stakeholders** and partners to develop a roll out to other departments and organisations that work within Criminal Justice, Mental Health, Employability and Education sectors.
- We will be delivering **Leadership Training** to help with the implementation of Support & Connect, FORT and the change management implication.



What does a holistic client journey look like?

Client presents to worker at local service (Letham4All at the Hub) where they are comfortable and feel safe. They are running out of money regularly.



CAB adviser introduced and interview arranged

Needs assessed and identified - Life-altering event, client left with no income



Client has been living with long-standing physical and mental health challenges but had not sought support as they didn't know where to turn



The Adviser worked closely with them to explore ways to maximise their income



They received assistance to apply for UC and the adviser supported them to navigate the Work Capability Assessment, successfully securing ADP.

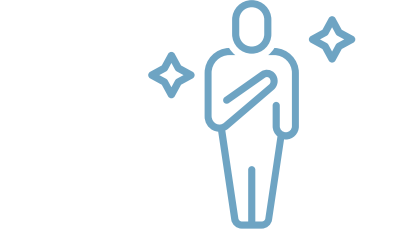
Achieving a Client Financial Gain in excess of £10,000 per annum, the client has achieved financial independence and now enjoys a stable income.



The other service is supporting the client with trauma-focused counselling, group wellbeing sessions, ongoing support for a year after completion of the sessions and ongoing opportunities for training (even leading to becoming a Peer Group facilitator if the client wishes).



The client opened up and discussed long held emotional issues and – with their permission - the Adviser made a referral through the FORT system to a trauma counselling organisation based on the client's circumstances.



Adviser able use trust built with client to explore other areas identified by the social needs screening tool

The adviser also facilitated an application for council tax reduction and explored Discretionary Housing Payment to help cover a shortfall in rental costs.





GOT QUESTIONS?

Contact us.



0808 196 9440 (Freephone from mobile & landlines)



advice@perthcab.org.uk



Chatbot 24/7 at www.perthcab.org.uk



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advice
bureau**