



## Evaluation summary: Managing Migration pilot

<p><b>Project Background</b></p>	<p>Universal Credit will require those receiving the new benefit to make and manage claims online, as well as adapt how they manage their finances. We recognised that many people, including existing or potential Citizens Advice clients, might struggle to do this successfully without the right information and support systems in place.</p>
<p><b>Aims</b></p>	<p>In March 2013, we ran a six month ‘managing migration’ pilot project to understand the level and nature of support our clients would need in making the transition to Universal Credit. The pilot evaluation was designed to understand:</p> <ul style="list-style-type: none"> <li>● how many of our clients would be affected by Universal Credit</li> <li>● client needs for the transition to Universal Credit, as identified by capability measures in 5 key areas</li> <li>● what services are needed to provide these clients necessary support and how effective are they at improving client capability</li> </ul>
<p><b>Methodology and approach</b></p>	<p>This evaluation used three local Citizens Advice sites to gather practical and useful information about the needs of our clients to help inform our network about what support might be effective for clients transitioning to Universal Credit. The three sites were chosen because they reflected the diversity of our service – operating in rural and urban environments with differing client profiles and resources. Project delivery was split into three phases and evaluative data was collected during each. The phases were:</p> <ul style="list-style-type: none"> <li>● Client identification (and baseline of capability)</li> <li>● Support and interventions</li> <li>● Client follow up</li> </ul> <p>During the first phase, client capability was assessed on a standardised 1-5 scale in five capability areas. Those who scored 3 or less on any of these areas were considered ‘not ready’ for the transition and were offered CAB advice and support interventions. After each intervention, and during follow up, clients were rescored on the same capability areas and scales. Identified barriers to improvement were also recorded.</p> <p>We worked with 1,746 ‘Universal Credit’ relevant clients who completed an initial assessment (from a total of 3,460 clients during this period) – with 1,342 going on to receive the intervention. This represents a statistically valid sample of our overall client base, representative of the client profile we see each year.</p>



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<b>Findings</b>	<p>This project set out to understand the needs of our clients who will transition to Universal Credit, and what role our services might play.</p> <ul style="list-style-type: none"><li>● 9 out of 10 clients will need support to manage the transition in one or more of the following capability areas: managing monthly payments, budgeting, banking, staying informed and getting online.</li><li>● It is not just those that are vulnerable that will need support. Initial support needs across the capability areas were the same for all profile characteristics, with 38 per cent of clients needing support across all five capability areas.</li><li>● After receiving advice and support from the CAB service over half of clients improved skills in all five key areas.</li></ul>
<b>Impact of the project</b>	<p>This project was instrumental in highlighting the difficulties many of our clients are likely to face with the introduction of Universal Credit. Crucially, by focusing on looking at clients' capabilities and knowledge, we were able to gain insight into levels of need and demand in advance of Universal Credit rollout, informing service planning and our policy insight. This pilot showed that our advice and tailored support helped the majority of clients to improve their skills and abilities.</p> <p>The <a href="#">full report</a> is on the Citizens Advice website.</p>
<b>Our learnings about evaluation delivery</b>	<p>During the delivery of this project, we found that some clients disengaged, not feeling that the service was relevant to them at the time. This highlighted a challenge of managing the timeliness of support services for a changes that have not yet taken place.</p>

At Citizens Advice we are committed to understanding what works and ensuring organisational resources are responsibly invested into worthwhile services. Our Impact and Evaluation team are responsible for customer insight research, assessing service effectiveness, and demonstrating the impact and value of the Citizens Advice service through evidence and analysis. When evaluating our services, this includes:

- **Evaluations of direct service delivery** - understanding what works for who and why, informing organisation decision-making and resource-use.
- **Shared outcomes measurement** - designing clear outcomes measures that can be used by the 300+ local charities that make up the Citizens Advice service
- **Equipping local Citizens Advice to undertake outcomes research** - providing guidance on theoretical and practical considerations of local service evaluation
- **Evidencing the impact and value of our work** - findings from specific evaluations help us build-up our evidence on the impact and value of the Citizens Advice service

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