



**Scottish Accessible  
Information Forum**

**Standards for Disability  
Information and Advice  
Provision in Scotland**

## **Scottish Accessible Information Forum**

Standards for Disability Information and Advice Provision in Scotland

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This document is available on request in the following formats:

- braille,
- large print,
- audio tape/CD,
- electronic format,
- British Sign Language.

It can also be downloaded in PDF and Microsoft Word from the SAIF website.

## Foreword

Since they were first published in 1999 the SAIF Standards for Disability Information and Advice Provision in Scotland have been an extremely valuable guide to many information and advice providers in Scotland.

Information is not a luxury and if it is to be useful, it is vital that it is accessible. Getting the right information at the right time is particularly important for disabled people and carers who have often faced barriers in accessing the support and services they need. Exclusion from some of the most fundamental services contributes to feelings of isolation. Equality is central to all of our policies, and I hope our work together will continue to remove these barriers and encourage an inclusive society. Use of these Standards will help this happen.

Significant recent developments make this updated and more accessible edition of the SAIF Standards very welcome and relevant. Following changes to the Disability Discrimination Act in 2005, we now have a public sector Disability Equality Duty which requires public bodies in Scotland actively to promote equality for disabled people. Information that is accessible to all will help public bodies to engage meaningfully with disabled people, not just in consultation but in active involvement in planning and delivering services. It will also help public bodies to realise their goals of disability equality.

These Standards provide essential and straightforward guidance for service providers and planners who need to ensure that access to information becomes a reality for disabled people. Disabled people themselves have led the Standards development process and SAIF rightly promotes the importance of that approach if the best results are to be achieved.

I am extremely pleased to commend this new edition of the SAIF Standards to all information and advice providers and indeed all service providers with a role in providing information or advice.

Lewis Macdonald  
Deputy Minister for Health and Community Care

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## Acknowledgements

The Scottish Accessible Information Forum (SAIF) would like to thank Michael Bell Associates (MBA) and the Federation of Independent Advice Centres (now Advice UK) who, in partnership, initially developed these Standards on our behalf and according to our specification.

We wish to acknowledge the support of the Scottish Consumer Council which hosts SAIF and the Scottish Executive Health Department which funds our work.

In particular, we would like to thank all those disabled people who participated in the focus groups held by the consultants. We would also like to thank Grant Carson at the Centre for Inclusive Living in Glasgow and Bill Fisher at the Lothian Coalition of Disabled People who set up the meetings.

Similarly, we thank the 17 agencies that made a valuable contribution to these Standards through their participation in the seminars organised by the consultants.

We are also grateful to the 188 organisations which responded to our postal questionnaire and those organisations and individuals who have completed feedback forms and provided us with so many positive comments and suggestions.

The SAIF Standards Working Group has directed this work since 1999. Members of the Standards Working Group responsible for one or both of the first two editions of this publication in 1999 and 2004 were Grant Carson, Jean Dunlop, Kate Fearnley, Kirsten Anne Ferguson, Lionel Long, Lucie McKenzie and Shirley Young. The project workers were Steve Harvey and Sarah Smith.

One of the key reasons for the publication of this revised edition was a number of recommendations made to us by the Scottish Executive Sensory Impairment Action Plan Steering Group. Those recommendations have been incorporated.

We are grateful to the Scottish Executive Health Department Adult Support and Protection Unit which facilitated the process and to the organisations on the steering group that made an input into this third edition:

- The Scottish Council on Deafness,
- Deafblind Scotland,
- The Royal National Institute of the Blind.

With the support of the current SAIF project workers, Steve Harvey and Susan Burn, this edition has been developed by the members of the 2005/06 SAIF Standards Working Group:

- Jean Dunlop – SAIF vice-chairperson,
- Grant Carson – Glasgow Centre for Inclusive Living,
- Lionel Long – UPDATE,
- Lucie McKenzie – Citizens Advice Scotland,
- Nicola Noon – Scottish Council on Deafness,
- Marilyn Slavin – Common Knowledge,
- Sandra Wilson – Fife Employability Network,
- Carolyn Wyper – NHS Ayrshire and Arran,
- Mary Evans – co-opted from Dyslexia Scotland,
- John Whitfield – co-opted from Deafblind Scotland.

In particular we are grateful to Nicola Noon of the Scottish Council on Deafness and Mary Evans of Dyslexia Scotland for their work in completely rewriting the Standards in plain language and making significant improvements to their accessibility.

Again we are indebted to Lynn Welsh and Irene Henery of the Disability Rights Commission for updating the section on legislation.



Ben Forsyth  
Chairperson, Scottish Accessible Information Forum  
2007

### Background to the Standards

The Scottish Accessible Information Forum (SAIF) is a project funded by the Scottish Executive and based in the Scottish Consumer Council. It has a remit to carry forward recommendations made by the Scottish Working Group on Information Services for People with Disabilities and Carers. The development of these Standards was one of the recommendations contained in the working group's final report *Enabling Information* (1995).

This is the second revised edition of the SAIF *Standards for Disability Information and Advice Provision in Scotland*. The first edition was produced in 1999, before the implementation of the Disability Discrimination Act and the establishment of a Disability Rights Commission (DRC). The second edition was published in 2004.

The legislation, the Disability Rights Commission, the SAIF Standards and many other initiatives have led to increased accessibility over recent years, but wherever you look you see the need for more progress. Ongoing tasks for SAIF are to develop the Standards further and to continue to campaign for greater awareness and improvements.

This edition of the SAIF Standards is written in plainer language and restructured and redesigned to be even more accessible.

Again the Standards are written on the basis of a 'social model' rather than a 'medical model' of disability. As such, they are designed to encourage disabled people to make demands upon service providers and to take part in ongoing developments and improvements.

The Standards aim to address the accessibility concerns raised by disabled people:

- the design and layout of buildings,
- the range of formats available,
- the awareness, attitudes and knowledge of staff.

Some of these issues, such as the physical constraints of buildings, may raise resource issues. Others, such as staff attitudes, may reflect a lack of commitment on the part of management to ensuring the accessibility of services for disabled people.

## **The Role of the Standards**

The Standards are intended to help agencies in the voluntary, private and statutory sectors so that disabled people can access information and advice services easily.

The Standards recognise that disabled people access information and advice from a range of agencies:

- specialists in disability issues,
- general advice services which offer their services to all members of the public,
- agencies where information and advice form only a small part of their work.

The Standards are designed to apply to all of these agencies. However, they are particularly aimed at those agencies which provide a service to all members of the public. This is so that these agencies can provide a good service for disabled people.

The Standards are a way of establishing the boundaries of a service. They do not detail procedures and systems and they do not contain targets. They are designed to identify a range of indicators. They can also be used to develop performance targets that can be monitored and reviewed. They should be seen as a framework for continual improvement and development. Disabled people should be able to influence future changes.

The Standards are written so that they are relevant to all agencies. These can be large or small, urban or rural. Agencies should not feel that they are 'too small' or 'too under-resourced' to meet the Standards. All agencies should aim for the highest possible standards while innovative practices can extend the scope of even small and poorly resourced agencies. Many of the Standards can be achieved by taking time to look at good practice and then following it.

Similarly, we would like to stress that the Standards are not just the responsibility of individual agencies. Agencies can greatly improve their ability to meet the needs of disabled people by working together. The section called Local Information Strategies looks at the role that local authorities can take in helping agencies to comply with the Standards.

The Standards are designed as a tool for disabled people, service providers and service commissioners to help them achieve services which are accessible to everyone. They provide organisations with a means of reviewing past and current activities and developing services for the future.

The Standards aim to be dynamic. They include guidance on how to involve disabled people and their representatives so that they can provide feedback which will ensure that the Standards continue to develop in such a way that the needs of all disabled people are met.

The Standards include three separate sections:

- **Information and Advice Providers**

This section contains both the Standards and guidance for individual agencies on how they can meet the needs of disabled people. It includes advice on the ways in which disabled people should be involved in the planning and delivery of the services.

- **Local Information Strategies**

This section recognises that strategic planning needs to be done within local areas. This will strengthen the development of individual services so that all can be easily accessed.

- **Disabled People and their Representatives**

This section is for disabled people themselves. It outlines the minimum service that they should be able to expect and explains how they can complain and campaign if this level of service is not met.

Towards the end of the document we have included a useful self-assessment checklist.

## **The Role of Information and Advice**

The provision of good quality information and advice is central to any service. Everyone should have access to this information so that they can access services and exercise their rights. Information and advice play a key role in any strategy which promotes social inclusion.

Advice should offer more than just an opportunity to resolve problems. It should also present options. It should include identification of the following:

- needs,
- aspirations,
- problems,
- constraints,
- resources.

Disabled people can have highly individual needs. These can include communication support needs and preferred information format requirements.

## **Communication Support Services**

These should include the following:

- sign language interpreter,
- deafblind interpreter,
- lipspeaker,
- notetaker,
- speech-to-text transcription,
- loop system.

Staff should be aware of communication support services and how to access them.

## **Preferred Format**

This should include the following:

- large print,
- audio tape or CD,
- British Sign Language,
- braille and Moon,
- an easy-to-understand version in plain English with graphics, avoiding jargon and acronyms.

Staff should be aware that these formats alone may not be enough. It might be necessary to make arrangements to provide one-to-one communication support to enable access to routine information.

## **The Information and Advice Process**

It is vital to recognise that each disabled person has very specific needs. For example, each group is very different, especially in terms of communication and mobility. Further, each person who has one or more impairments has highly individual needs and different format requirements.

The term 'advice' can be used in a number of ways by different organisations and even within a single organisation. We have taken the term to relate to a range of complementary activities and processes.

One-to-one provision of advice should be used where available. Interpreting should be provided where required and information should be available in the preferred format.

We define advice as:

- listening to service users,
- identifying information needs,
- giving information in whatever format is preferred,
- advising on the options available,
- taking action on behalf of clients as requested,
- making referrals where appropriate,
- negotiating on behalf of service users as requested,
- representing service users' cases at tribunals and courts,
- enabling or empowering individuals to take informed action on their own behalf as appropriate.

The advice service will need to decide which of the above interventions it is competent to provide. Available resources should also be taken into account. The individual advisor should work with the client within this framework to assess which of the interventions is suitable.

Each of these activities may require either general or specific skills from the advisor.





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## **Information and Advice Providers**

Please make sure that all managers, staff and volunteers are aware of these Standards.

You should involve your service users at all stages.

Standard 4 offers strategies for involving disabled people.

## Information and Advice Providers

This section offers guidance for information and advice providers. It focuses on how to meet the needs of disabled people and also to ensure their involvement in the planning and delivery of services. It is particularly designed for generalist agencies that do not specialise in meeting the needs of disabled people. It is designed to provide such bodies with a range of tools to assist with compliance.

These Standards relate only to the provision of information and advice. Where an organisation provides a range of other services it is reasonable to only apply these Standards to the section of the agency providing information and advice. However, there may be aspects of the Standards, particularly those involving disabled people in planning services, which could usefully be applied to other areas of work.

The model we have used for the development of these Standards is a dynamic one that should allow for constant improvement. This means that the Standards are a tool to ensure a process that will help providers of services involve disabled people in both the planning and delivery of information and advice.

In developing this section we are aware of the financial pressures upon many agencies. Depending upon the circumstances in individual agencies there may be some cost implications in implementing the Standards. These costs will need to be balanced against both an agency's other priorities and the potential cost of non-compliance with the new legislation.

Funding is more likely to be released to support the work if an organisation has clear objectives and a clear strategy for realising these objectives. In addition, involving your users in the planning of services is likely to ensure that resources are allocated in the most efficient and effective ways.

These Standards are not designed to replace other standards or quality systems within which your organisation is currently working. They are intended to supplement these to ensure that disabled people can access information and advice in a way that is effective and meaningful to them.

The Standards are presented in four sections:

- Governing to Ensure Accessibility,
- Developing Your Service to Ensure Accessibility,
- Managing Your Service to Ensure Accessibility,
- Involving Disabled People and their Representatives.

In each section the Standard is presented in bold text followed by an explanation and good practice notes. A useful self-assessment checklist can be found towards the back of this handbook to help you monitor and review your agency's compliance with the Standards.

Resources currently exist, and others are being developed, to assist agencies in meeting these Standards. For example, HomePoint has developed training modules on working with staff and volunteers for information and advice providers. The Telephone Helplines Association provides guidance on standards for telephone and other electronic information services. Similarly, much is available from Advice UK and Citizens Advice Scotland and other advice networks. A contact list of useful addresses is provided at the end of these Standards. SAIF works with UPDATE, Scotland's national disability information service, developing additional resources for agencies.

## Standard 1 Governing to Ensure Accessibility

### 1.1 Defining Your Service

**You should have a clear statement of the values that underpin your service and the role that your organisation hopes to undertake.**

**Why are you providing a service?**

**Who is your service for?**

**What type of service are you providing?**

**What do you hope to achieve?**

**Staff, volunteers and managers must be aware of these objectives.**

Your statement needs to outline your aims and objectives simply and clearly.

- **Why are you providing a service?**

Are you an information or advice provider or is this offered as part of a wider service?

- **Who is your service for?**

Is it open to the general public or only specific sections of the public?

Is it open to everyone with a particular need or only to those within a specific geographical area?

Are you targeting specific sections of the community?

If so, how will you reach them and how will you monitor your success?

Will you meet the requirements of Section III of the Disability

Discrimination Act and other relevant regulations?

- **What type of service are you providing?**

Are you offering a general service or focusing on specific areas?

What level of advice are you providing?

Are you only offering information or are you also providing a casework service?

Can you offer support or legal representation as a follow-up service?

Are there areas of law that your service does not cover?

- **What do you hope to achieve?**

Is your agency well placed to deliver these aims and objectives?

## 1.2 Equal Opportunities

**You should have a clear statement for achieving equal opportunities in your employment practice, management structures and service strategy.**

**There should be a commitment to meeting the needs of all parts of the community. All disadvantaged groups and those experiencing discrimination should be included, unless your aims and objectives clearly define you as a specialist service for a specific sector of the population.**

**This policy should explain how you intend to implement it and how you will measure its effectiveness.**

**All your other policies and practices must be consistent with this.**

**All staff, volunteers and managers should be aware of this policy.**

A good equal opportunities policy will include these elements:

- a clear statement covering employment practice, management structures and the provision of services,
- compliance with the law in terms of disability, gender and race,
- the steps taken to comply with this statement,
- the ways in which progress on equal opportunities will be monitored and reviewed,
- a commitment to providing awareness development and appropriate training - you should include disabled people in the design and delivery of disability equality training,
- the responsibility of the individual within the agency - an active commitment is expected of all staff and volunteers,
- complaints, grievance and disciplinary procedures in respect of breaches of the policy.

## **1.3 Service Planning**

**You should have a clear service plan for using your resources. This should outline the service provided:**

**Is your service office based?**

**Do you have a telephone helpline, outreach services and/or home visits?**

**How widely available is your service, including opening hours?**

**What level of information or advice can you offer?**

**How many cases can each advice worker take on?**

**How many areas of information or advice can you cover?**

**How do you co-operate with other agencies?**

**Do you have any wider targets and if so, how will these be achieved?**

The skills and the resources within your agency should be used as effectively as possible. This should include the available financial, physical and human resources.

Good planning helps to identify the gaps in your resources. Planning may also show that better use can be made of these resources by moving them from one area to another within your service. Planning helps you to set objectives which can then be used to evaluate the service.

The service plan helps you to set individual work plans for staff and volunteers.

## 1.4 Service Review

**You should regularly review your work against the targets and indicators set in your service plan.**

**Your review should be available in accessible form at least once a year.**

Your annual review should look at the work of the past year. It should assess its effectiveness. This will help you build on the successes of the year and plan the work of the following year. Weaknesses in the past year can be remedied.

Longer-term aims and objectives can be adjusted as a result of this review. It can also be used to adjust individual workplans in order to address gaps identified in your service.

It can also be useful for you to review any changes in legislation or in the procedures and policies of your local authority as these may have affected your users. You should also consider the impact of any future changes and include these in your service plan.

This review process is part of your commitment to your users and the wider community. It will ensure your service meets the needs of your users and represents value for money.

## 1.5 Forward Planning

**You should have an outline strategy. This provides a background against which you can both review your performance and take decisions about the future.**

**The strategy should make it possible to decide on staffing levels, office locations, computer purchases and any other relevant matters.**

Planning for the future will help you to maintain a quality service.

The Forward Plan relates closely to your service plan and helps to set an overall framework. It looks at future needs, opportunities and resources within the context of your aims and objectives. It can take the form of a strategic plan and/or a more detailed business plan.

The Strategic Plan focuses on long-term issues. It answers questions such as 'Where do we want to be in five years time?' and 'Does this match our aims and objectives?'

The Business Plan focuses on short-term issues. It is often prepared for three years, but contains more detail for the first year. It should be subject to continuous review.

The Service Plan is prepared each year, along with the annual budget, and will include the items noted in section 1.3 above.

Planning is a demanding activity in terms of resources but the investment should pay off. It will enable you to avoid the stress of crisis management and enable you to meet your aims and objectives in the most efficient and effective way.

## 1.6 Independent Information and Advice

**You should comply with requirements for independent advice as set down by a relevant national agency.**

**You should also ensure that your users are aware of any limitations in the advice provided.**

Relevant national agencies include the following:

- Citizens Advice Scotland,
- UPDATE,
- Advice UK,
- Telephone Helplines Association.

You must be able to represent the interests of your users without fear or favour. Users must be confident that you are acting in their best interests and not providing advice which is for your advantage or for the advantage of a third party. If this is not possible, your users must be offered alternative sources of help. For example, an advice service based within a social work department may not be in a position to advise a disabled person that he/she could take action against the local authority for an act of negligence.

You should also note that, particularly in areas of financial advice, membership of certain bodies is a legal requirement and you are not permitted to give advice in these areas without such membership.

In addition to ensuring your freedom to act on behalf of the individual service user, you should ensure that your advice is not compromised by any conflict of interests.

A number of issues can arise in respect of staff and volunteers. You need to ensure that the work undertaken by such staff and volunteers is done in an impartial manner.

For example, conflicts have arisen when staff or volunteers with allied business interests have inappropriately referred users to their own businesses or those of their relatives.

## **Standard 2 Developing Your Service to Ensure Accessibility**

### **2.1 Premises**

**You should review your premises at least once every two years. You should look at the following:**

- **suitability of location to your catchment area,**
- **accessibility for those with particular physical or sensory needs or with reading and communication difficulties,**
- **level of provision such as confidential interview rooms.**

**You should produce this as an action plan or strategy paper.**

**As a minimum all agencies providing an advice service on the premises must have the following:**

- **adequate public reception and waiting room,**
- **private interviewing rooms that are sound-proofed and not visible to other users,**
- **private office for follow-up work,**
- **accessible and adequate toilet facilities,**
- **means of occupying children of your users.**

#### **Location**

The quality and maintenance of your premises play a very important role in ensuring access to your service. Visiting a publicly-available service can be very stressful and intimidating, particularly if you are upset. Your premises should therefore be suitably located, easily accessible and welcoming.

#### **Accessibility**

Physical barriers to access can be one of the most difficult factors in reducing overall access to information and advice. It is important that agencies develop disability awareness in all aspects of their work, and this is particularly important in relation to premises. As well as wheelchair access, there are other things that should be considered. For example, careful use of lighting and colour with directional signs can help people with visual impairment. Induction loop systems can help hearing aid users.

## Provision

The layout of your reception area is important in order to ensure that people feel welcome. For example, the height of reception desks can make wheelchair users feel unwelcome.

The availability of confidential interview space has been set as a minimum standard to ensure that service users receive a confidential and private service. However, office-based advice sessions are not the only way of delivering a service. You may wish to consider other means of confidential service delivery such as home visits or telephone advice.

A private office for follow-up work helps to ensure confidentiality

You must provide toilets that both staff and service users can access, and one of these should be adapted for people with mobility problems. Disability groups can provide more detailed specifications. However, such toilets should provide wheelchair access, a raised seat, handrails, a wheelchair-level washbasin and a call system in case of emergencies. Ramps and doors with hinges that make entry easier are also important for people with mobility problems.

You should consider the needs of parents and children when planning your premises. Distractions for children, such as the provision of toys and books, may help the parent to access your service.

The involvement of disabled people can help avoid problems.

The adaptations that you make to improve access for your service users can be beneficial in terms of your staff and volunteers as well.

Improving disabled access to premises means that agencies can recruit both disabled staff and disabled volunteers.

Finally, the general aspect of premises is important. Very basic and cost-effective means of brightening up premises can make the centre a more welcoming place. Painting and decorating, using pictures and plants, and the arrangement of the furniture can all make a difference between a depressing environment and one that feels friendly.

## 2.2 Service Delivery

**Regularly review how you deliver your service to ensure both accessibility and the effective use of resources.**

Traditional office-based information and advice is still a key means of delivering services. However, you should examine your methods of delivery to ensure that these meet current and potential service users' needs.

The areas that need to be considered include the following:

- telephone/textphone helplines,
- email, fax and SMS enquiries,
- the internet,
- home visits,
- outreach premises.

All of these methods of delivery can improve access for groups of disabled people. However, such services need clear guidelines.

As a minimum, you must consider the following:

- how to publicise the service effectively,
- how to ensure the safety and confidentiality of service users,
- how to ensure the safety of staff (particularly with regard to services away from the office base).

The development of the 'right mix' of methods of delivery will be improved by direct consultation with your current and potential service users. You could also exchange ideas and experiences with other service providers.

## 2.3 Hours of Opening

**You should regularly review your hours of service to make sure that these meet the needs of your current and potential service users.**

Traditional office hours of opening may exclude some people from using your service.

When setting your opening hours, you could take into account the timing of local activities in your area, the opening hours of other organisations and the availability of public transport.

## 2.4 Service Promotion

**You should produce a marketing plan or promotional strategy as part of your service plan. It should meet your aims and objectives.**

**Your budget should include funding for promotional work.**

Your target service users should be aware of the services available. In order to achieve this, regular publicity is essential. Publicising the activities of your organisation ensures that you continue to reach people who may have a need for your service. It is possible that some groups are excluded from services through ignorance rather than need.

Instead of encouraging additional use, your promotional strategy may need to consider how to keep demand to a manageable level. For example, your service may experience peak periods of high demand. You may then decide to publicise recommended times for enquirers in order to avoid these periods.

Promotional material needs to ensure that you are not only publicising what your service does, but also when it is available and how it can be accessed. Specific parts of your service may be relevant to particular groups and should be publicised in different ways. For example, if you are open one evening each week specifically for people who are in work, you should ensure your publicity reaches these people. It should also be carefully worded to make clear the intentions of the session. Similarly, if you offer a home-visiting service your promotional material should explain who this is for to avoid inappropriate demands for this part of your service.

Publicity also ensures your accountability to the wider community. You can achieve this through annual reports to inform the wider community about casework and achievements during the year. It should also include details of any changes made as a result of user involvement and explain how people may become involved in future planning of services.

## 2.5 Alternative Formats

**You should be able to provide information in a range of formats which are appropriate to the needs of disabled people. These should include specialist one-to-one support where appropriate.**

**Provision of information in alternative formats should be prompt, with people being able to receive such information within a time agreed between the information provider and the service user.**

New technology has considerably reduced the costs of producing information in alternative formats. However, there can still be costs attached to this Standard. Service providers could make direct provision of information in a range of formats. Alternatively, they could establish a local network where, for example, one provider has responsibility for producing information in braille whilst another produces information on tape.

In partnership with SAIF, UPDATE publishes the *Scottish Formats Resource* which is a directory of transcription services providing information in a range of alternative formats. It is available free from SAIF - contact details are on page 2.

## 2.6 Interpretation

**You must have clear procedures for the use of interpreters. Interpreters must follow your confidentiality policy.**

**You should also ensure that information is available in appropriate community languages.**

You should be aware of the needs of people who may have difficulty with spoken and written English. This applies to people whose first language is not English and to those with other communication support needs. Interpretation should include all spoken and signed languages.

Your planning and consultation processes should enable you to identify current and potential levels of need in the community for this type of service. Even where planning has not indicated an existing need, you should consider how you would provide such a service if it is required. Again, the *Scottish Formats Resource*, available from UPDATE or SAIF, provides a directory of translation and interpreting services.

## 2.7 Information for Children and Parents

**You should ensure that all information that affects children directly is provided in a format that adults and children can look at together and/or that children can look at, read or listen to themselves.**

Any information which affects children directly – about their own health, education, welfare and legal rights – should be available to them. They should also be able to access services that cater for children and young people.

Grapevine, the Lothian Disability Information Service, has produced guidance on providing information to children. It suggests that information can be made accessible to children in a number of ways:

- Wherever possible, ask children what they think should be included in the leaflet, poster or tape. They will often have ideas on appropriate content, style and layout.
- Younger children will need simple language together with large bold print, short sentences and lots of pictures.
- Older children and teenagers will probably prefer cartoons and comic strip style layouts with a more sophisticated approach.
- When trying to explain technical or abstract things, use examples which children can understand.
- Include colouring in, puzzles or quizzes in the leaflet. This will not only help children to remember the message, but will also make it fun – a key requirement for children of all ages.
- Information for children should also be available in other formats and in appropriate languages.
- Make sure all information for children is displayed within their reach.

## 2.8 Referral Arrangements and Relationship with Other Providers

**You should maintain regular contact with other providers in your area.**

**Formal referral agreements should be established between providers to ensure service users receive a consistent, seamless service.**

It is essential to ensure that all people within the community have access to a range of good quality services.

The referral agreement should always include the way in which the referral is made. It should be to a named individual and should include the following:

- the dates and times of any appointments,
- the grounds for acceptance or rejection,
- the respective responsibilities of referrer and referred,
- the expected outcome of the referral,
- the right of the referred to return to the original service provider if he/she is not satisfied.

When referring to other agencies, you should have clear selection criteria. Where possible, you should consult with the service user. In complex cases, written instructions should be provided for the referral body.

## **Standard 3 Managing Your Service to Ensure Accessibility**

### **3.1 Managing Your Service**

**You should have a written description of your management structure and be able to explain this structure to staff, volunteers, service users and others who have an interest.**

**You should maintain an office manual giving details of office practice. This information must be easily available to all managers and staff and should be included in your induction process. Within the management structure, the person who is responsible for maintaining this manual should be clearly identified.**

Individuals will move on so the clear definition of roles, responsibilities and expectations is important for the long-term success of a service. Procedures and practices vary between services and will also be modified at times within a particular service so all members must be fully aware of what is expected of them at all times. Your office manual is the key to this.

## 3.2 Managing and Training Your Workers

### Job Description

### Performance Appraisal

### Training Policy

**You may be able to provide a high-quality service at present, but this may be due to the particular skills of individual staff. As all agencies experience turnover in both paid and unpaid staff, you will need a detailed procedure relating to staff recruitment.**

### Job Description

A job description details the skills, knowledge and experience required of all staff. It also covers the tasks they are required to perform.

### Performance Appraisal

A performance appraisal system for staff and volunteers allows you to measure performance against an individual's responsibilities and objectives. You should introduce a means by which you can act upon these appraisals.

Your agency meets service users through your staff. The quality of an individual's work and his/her skills should be regularly assessed. Appraisal, linked to regular supervision, can be a positive tool that not only gives you a regular overview of how someone is performing, but can also help you to look at future training needs and areas of personal development.

Disabled people highlighted negative staff attitudes as one of the key reasons why they chose not to use certain agencies. Dealing with these attitudes is a management issue that can be identified through appraisal.

## Training Policy

You should have a written training policy that ensures the following:

- advisers are trained to a level of competence appropriate to their work,
- training and development needs, which are regularly reviewed, are assessed for each person in the agency against service objectives,
- written training records are maintained,
- a budget is identified and maintained for this purpose,
- in the event of new legislation, you should have a contingency plan that affects the areas of advice undertaken.

To continue delivering a quality service, the skills and knowledge of new and existing staff should be updated. Your training policies and training needs should be considered as part of your planning process. Overall training areas should be identified for planning purposes under a number of headings:

- induction training,
- 'on the job' training,
- specialist skills training,
- core skills training,
- personal development training.

Core training areas should include the following:

- agency awareness - the aims and values of your agency,
- interviewing skills,
- analytical skills,
- disability equality,
- cultural awareness,
- customer care.

Disabled people can often make a valuable contribution to disability equality training. UPDATE or Inclusion Scotland will be able to suggest appropriate organisations to assist in this area. A list of contact details can be found at the end of this handbook. It should also be noted that the type of staff recruited can transform the culture of an agency. As part of the process of getting rid of discriminatory practices, you should recruit disabled people as information and advice providers.

### **3.3 Confidentiality and Access to Information**

**You should have an effective policy on confidentiality. This should describe the circumstances in which information may be passed on. It should also explain how breaches of this confidentiality will be dealt with. The policy should include the required forms of authority which will allow your service to act on behalf of service users. All service users must be kept informed of any information that has been passed to others.**

**You must also have a clear policy on access to information. This should explain what information is held about clients and how service users can access this information.**

Every service user has the right to expect that the service which he/she receives is provided in confidence and that any records kept by the agency are fair and accurate. The service user should have access to any records kept about the case. Service users have a legal right to access information kept on file about them.

You must provide confidential interview space. Service users have the right to be advised confidentially and in private.

Your Confidentiality Policy should make clear the level of information a service user may be asked to give in a public reception area. Interview procedures, case files and enquiry records should also be included.

The need for confidentiality should not prevent discussion of a case within the service. Casework audits should be carried out and the Confidentiality Policy should allow for assessments to be made as to whether standards of advice are being met. You should be clear about the distinction between confidentiality and anonymity. A client-centred service must balance respect for the personal details provided with steps to ensure that the service user's needs are met in the most effective way. If service users are kept informed of the way in which information is being used and agree to this then confidentiality should not hinder the advice process.

Consent forms must be signed so that the service user gives permission for details to be passed to a third party when necessary. You must make sure that the service user is fully aware of what he/she is signing.

If there is a clear danger to the service user or to someone else, you may need to breach confidentiality.

Ensuring confidentiality in some localities, particularly in rural areas, can raise broader issues in relation to access. A specific service, for example a Debt Support Unit, which identifies the problems of people visiting the service, may have a low take-up. In order to preserve confidentiality in these cases, it may be necessary to provide non-specified sessions or to work through other agencies.

### **3.4 Information Resources**

**You should have access to up-to-date and appropriate reference materials. In addition, your service plan should indicate who is responsible for maintaining and updating information resources within your service plan.**

**Using information resources that are out of date can be worse than having no information at all.**

Good information and advice depends on access to up-to-date and accurate information. Without adequate resources, the quality of the information and advice that can be given will be reduced.

Access to reference materials and other information depends upon the systematic organisation and updating of these resources, together with appropriate training in their use. In larger organisations, an information officer could carry out these duties.

For smaller agencies, it may not be possible to appoint a full-time information officer. However, one person should be given key responsibility for this vital area of work and sufficient time should be given to him/her to maintain this task.

Providing a comprehensive information library for staff and volunteers carries resource implications. Resources can be increased if you make these materials publicly available.

Through your website, you can make information both widely available and accessible. Maintaining and updating this information does, however, come at a cost.

You should consider subscribing to UPDATE, Scotland's national disability information service. UPDATE provides accurate and relevant disability information to providers throughout Scotland, in fully accessible formats.

## 3.5 Case Management

**Only services providing an advice service need case management systems. It is not needed for those providing an information service.**

A range of Standards has been developed in this area by various advice-giving bodies. This Standard is a summary of best practice.

You should have a case management system that allows you to do the following:

- identify and trace all documents relating to a case,
- identify conflicts of interest,
- monitor the number and type of cases undertaken by each advisor to make sure that they are within his/her capacity,
- record centrally any key dates to ensure that action is taken in appropriate time,
- ensure that any action taken can be easily checked,
- ensure that there is proper authorisation and monitoring of all actions undertaken by your service.

You should have systematic ways of handling cases so that you can do the following:

- identify the needs of the service user,
- identify what action is to be taken,
- identify who will be responsible for the case,
- identify key dates in the case,
- identify how and when the service user will be kept informed,
- report and confirm in writing to the service user on the outcome and explain any action the service user should now take,
- return to the service user any original documentation except where the service user has agreed that your service should keep this information.

The delivery of a quality advice service depends on good and consistent case management. An effective system will make sure that each service user receives a service that is in line with other policies. It also means that service delivery is consistent and there is less risk of discrimination.

### **3.6 File Review**

**You should arrange for case files to be reviewed. This should be done by a supervisor or other adviser who has not already been involved in the case.**

All advisers make mistakes from time to time. You should have procedures in place to ensure that such mistakes are spotted as soon as possible and action taken. File reviews also help service providers to satisfy themselves, their funders and other stakeholders that effective and appropriate intervention is taking place.

### **3.7 Identifying Outcomes**

**You should try to identify, record and report on all the outcomes of your work.**

This can be a difficult area for advice providers but you should take it into consideration. Any system will probably need to take into account both the objectives and the way in which your service organises its work.

## **Standard 4 Involving Disabled People and their Representatives**

Services must become involved with their current and potential service users. Your service should be developed as a result of this consultation. In the Local Information Strategies section on page 49 we have suggested the development of forums for consultation. Individual services can also improve their own consultation processes.

### **4.1 Feedback from Service Users**

**You should make sure that you have procedures for actively encouraging feedback from your service users. A systematic way of monitoring this feedback and incorporating it into your service plan should be in place.**

**You should publicise any changes to your services which arise from feedback from service users.**

Your service exists to meet the needs of current and potential service users. It will be more effective if it has mechanisms through which it can both listen to and act upon the opinions of these service users. Disabled people should be seen as a specific group of current and potential service users.

Disabled people's opinions should be asked for on a range of questions which should include the following:

- the type of service provided,
- how they feel about the location of the service,
- the quality of the information, advice and other services provided,
- how safe the service feels and whether it excludes anyone because it is not user-friendly,
- the quality of the reception service and the waiting time,
- the level of advice provided – for example, the capacity to provide follow-up work such as legal advice,
- whether there are adequate relationships with other services to which efficient and effective referrals can be made,
- whether there are changing levels of need about which service users can tell the service provider.

There are many ways of listening to service users. You should consider using a variety of different methods, depending on the particular objectives you have set. Methods include the following:

- Customer feedback and survey forms which are given to each service user. They are usually anonymous.
- Small surveys of users conducted face to face – for example, exit interviews. If this method is used, it is important to make sure that people feel safe in answering questions honestly and that any information given will not affect them as service users.
- Involving service users in Users' Forums which may be organised on a regular basis.
- Inviting service users to sit on committees or working groups, including possible membership of the Management Committee.
- Involving service users in review and evaluation processes.
- Through Annual General Meetings and any other forums open to the public. Annual General Meetings can be opened out to include discussion time, with views and questions being invited from the floor. All such events should be held in venues which are accessible to everyone.

## 4.2 Complaints and Rights of Redress

**You should have an effective complaints procedure. This must be published and made available to all service users in an accessible format.**

**Information from complaints needs to be analysed and monitored then incorporated into the service plan if appropriate. Any changes in service arising from complaints must be publicised.**

**All advice providers must make sure that they have adequate professional indemnity insurance. This ensures that service users are not disadvantaged if service providers make mistakes.**

When things go wrong, you must make every effort to ensure that service users do not pay for the service providers' mistakes. Mistakes must be dealt with promptly and service users must be adequately recompensed.

Complaints can provide a valuable feedback. This can help with the planning and development of services so that they respond to needs and are accessible to all.

The Complaints and Redress Procedures should contain the following elements:

- what a service user can complain about – general level of service; the behaviour of a member of staff or volunteer; wrong advice; how easily the user can access the service,
- how they can complain – to whom they can complain; whether there are forms; how these can be obtained; whether they can be accessed in another format or communication method,
- how the complaint will be dealt with – how quickly; by whom; how the user will be involved,
- what they can expect as a result of their complaints – apologies; compensation,
- what action might be taken to change the service as a result of the complaint.

You should also have a strategy for publicising any changes made as a result of complaints. This should include information about how and why the complaints have occurred.

Your users must have clear information about how to complain about the attitude or behaviour of staff or volunteers. This can be a very difficult area and users should not feel intimidated.

## 4.3 Planning with Disabled People

Throughout this document we have explained how important it is to consult current and potential service users about the planning and development of individual services.

It is worth noting that disabled people are not a single group. The needs of one group of disabled people will not be the same as the needs of other groups. The needs of individuals within a group will also vary. When you are considering involving disabled people, you will need to be aware of the varying needs of many groups and individuals.

These will include the following:

- people with a visual, hearing or dual sensory impairment,
- people with impaired mobility,
- people with learning difficulties,
- people with specific literacy difficulties, for example dyslexia,
- people with limiting illnesses, for example HIV or epilepsy,
- people with mental health difficulties,
- representatives of disabled people.

There are four key stages. Different organisations will be at different stages.

Information      Consultation      Participation      Management

### The Minimum

- You must ensure that disabled people receive information about services.
- You must consult with disabled people on any service developments.
- You should secure the participation of disabled people in the planning and delivery of services.
- If you are mainly serving disabled people you should aim to place disabled people in positions of management.

The SAIF *Guide to User-Led Reviews* is a supplement to these Standards. It is designed to help agencies to assess how well they are implementing the Standards through the involvement of disabled people and is available free from SAIF. Contact details are on page 2.





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## **Local Information Strategies**

## Local Information Strategies

This section of the Standards is designed to provide a context in which individual information and advice providers can develop their services. The section on legislation outlines the context and framework for the provision of information and advice to disabled people. Parts of this legislation are likely to apply to the funders or commissioners of services as well as to the providers.

This section is also intended for those whose role it is to plan and fund information and advice services. It is designed to provide such bodies with a range of tools to assist with compliance.

Within this section it is recognised that strategic planning on a locality basis should underpin the development of individual services in order to ensure equitable access. It aims to place disabled people at the centre of the planning process for information and advice services.

The model we have used for the development of these Standards is a dynamic one which should allow for constant improvement. It suggests a process that will see both service planners and providers of services involving disabled people in the planning and delivery of information and advice.

In developing this section we are aware of the financial pressures upon statutory agencies. Depending upon local circumstances, there may be some cost implications to other Standards. This will need to be balanced against both other priorities and the potential cost of non-compliance with the new legislative framework.

In our experience of developing local strategies for accessible information and advice, funding is more likely to be made available from other areas to support this work if the objectives underpinning the provision of information and advice are clear and the framework is robust. In addition, we consider that involving existing service users and other disabled people who are potential service users is likely to ensure that resources are allocated most effectively.

## Strategic Responsibilities

Local authorities currently have duties with regard to the planning of services for disabled people. In accordance with the 'Disability Equality Duty' (2006), this should be seen to extend to the provision of accessible information and advice. The key areas of responsibility are as follows:

- undertaking demographic profiling to establish the number of disabled people in the locality and the nature of their impairments,
- using this information to assess the need for information and advice and the ways in which such information and advice can be made accessible to disabled people,
- preparing a plan to ensure that in the locality there is a suitable range of services that are sufficiently well co-ordinated to meet these needs,
- contributing to and encouraging others to contribute to the funding of such services,
- ensuring that groups that are funded to provide information and advice comply with these Standards – the self-assessment checklist may be adapted as a monitoring tool,
- keeping these plans under review in order to meet changing and emerging needs,
- collating this information in a way which could inform social policy development on a Scotland-wide basis.

## The Process for Planning and Review

The way in which these responsibilities are carried out is also important. The process should cover the following:

- All key funders and commissioners in the area should be involved. As a minimum it should involve representatives from the local authority and the health board.
- Providers of services should be involved to ensure that there is a seamless service for disabled people. For small organisations, compliance with Part III of the Disability Discrimination Act with regards to the range of impairments may prove difficult if they work alone. However, by working together in a co-ordinated way a range of agencies may be able to meet these needs. For example, one agency may take a lead in services for the visually impaired whilst another could address the service needs of people with impaired mobility.

- It is very important to involve disabled people in both the planning and review processes.

Where forums of disabled people exist, these should be formally involved in the planning process. Where these do not exist they should be established. The make-up and manner of operating will need to take account of what exists and what can work within the specific location. These forums could also help statutory bodies to fulfil their obligations with regard to consultation with service users in other areas such as community care.

In addition to this consultative role, the active involvement of disabled people in such forums can be valuable where these forums have another role. We suggest that funding for a community advocacy role should be considered.

This could include the following:

- promoting access to mainstream services for disabled people,
- collating this information to advise service providers on ways in which policies and practices could be developed to improve the services received by disabled people,
- acting as a resource for other agencies with regard to disability equality training and accessibility audits for materials and premises.

A supplement to these Standards is *Barrier Free Information – How to Develop Your Local Accessible Information Strategy*. It is a practical guide for local authorities and others and is published by and available free from SAIF. Contact details are on page 2.



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## **Disabled People and their Representatives**

## Disabled People and their Representatives

This section of the Standards is designed for disabled people and their representatives. It outlines the minimum service that you should be able to expect and how to complain and campaign if this is not met.

The new legislation was one of the factors prompting development of these Standards. We all know that it is relatively easy for the Government to give people rights in legislation. It is often much harder for people to access these rights and for these rights to impact upon their daily lives – hence the existence of information and advice services.

The purpose of this section is to tell you the minimum service standards you should expect from organisations providing information and advice and also from local authorities and others which plan and fund these services.

We are not simply telling you what you can expect from these services. We are also telling you how you can become involved in the delivery, management and planning of these services.

Please remember that you will need to be actively involved in putting these Standards into practice. Information and advice providers will only be able to fully respond to your needs if you make clear your demands to be treated equally as a member of society.

The final part of this section looks at how you can get involved so that all disabled people can access good-quality information and advice when they need it.

### Reception Standards

You need to be able to access the services of information and advice providers. Organisations must provide a service that does the following:

- clearly defines the types of information and advice provided and the ways in which it is provided,
- provides its service in a physically accessible building,
- is available at a time that is appropriate to you.

## Process Standards

Once you have gained access to the service you need to be confident that you will be treated with respect by people who have the skills to help you. You should be able to expect individual organisations to provide a service where the following is the case:

- staff have the knowledge to meet your requirements for information and advice,
- staff have been trained in disability equality issues appropriate to your personal circumstances,
- information will be available in a variety of formats within an agreed time.

## Standards of Service

Policies and procedures should be in place to ensure that the advice you receive is accurate, timely and appropriate. You should be able to expect individual organisations to provide a service that does the following:

- works in your interests,
- has adequate policies and procedures to safeguard your confidentiality,
- provides you with access to information that the service keeps about you,
- has adequate information resources to meet your needs,
- has adequate case management systems to ensure the smooth running of any casework undertaken on your behalf,
- has adequate relationships with other service providers to ensure that if you are referred from one agency to another you continue to receive a seamless service.

An organisation that works in your interests may be an 'independent' organisation not controlled by any vested interest. If it is part of a larger organisation such as a local authority this should be made clear to you. Any limits to the advice that can be given should also be explained to you.

## **When Things Go Wrong**

If you are unhappy with the service you receive, you should find that the organisation has the following in place:

- a complaints procedure that is simple to use and which allows you to continue using the service,
- the means to compensate you for any loss arising from their negligence or poor advice,
- a method for informing you of any changes that they have introduced as a result of your complaint.

Details of the complaints procedure should be made available to you in an accessible format.

## **Getting Involved**

Individual organisations should have a method for keeping you informed and consulted about the following:

- current services,
- plans for the future,
- the ways in which services are delivered,
- the place from which advice is delivered,
- the priorities for future services.

As a disabled person, carer, or the parent of a disabled child your local authority should have established a method for informing and consulting you about the following:

- its plans for the provision of information and advice,
- problems and shortcomings in current services,
- future priorities for the development of information and advice.

In **Local Information Strategies**, we suggested that each local authority should establish or support a disabled persons' forum to oversee and advise upon the implementation of these Standards. You should be invited to participate in this body.

In addition, if you are not satisfied with the range of services provided in your locality, or feel that you do not have adequate access to information and advice services, you should be able to voice these concerns through that group.

Your local authority should be able to provide you with details of how to contact this group. If no such group exists, contact SAIF. Details are on page 2.





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## **Legislation and the Standards**

## Legislation and the Standards

The first edition of these Standards was produced at a time of great change in legislation regarding the rights of disabled people and the structures of Government.

Most notably this included the following:

- devolution and the establishment of the Scottish Parliament,
- the establishment of the Disability Rights Commission,
- the implementation of the Disability Discrimination Act 1995.

This process of change has continued with the following:

- further implementation of the Disability Discrimination Act (DDA) and enhanced rights for disabled people in employment, introduced in October 2004,
- a new Disability Discrimination Act in 2005 which has already made changes to the definition of disability and which will over the next few years make other substantial changes to what is covered by discrimination, as outlined below,
- a rewriting of education and special educational needs legislation in Scotland with the Additional Support for Learning Act 2005 which introduced changes from November 2004,
- the new Mental Health (Care and Treatment) (Scotland) Act 2003 coming into force.

### Disability Rights Commission

The Disability Rights Commission (DRC) officially opened its doors in Scotland in December 2000. Its job is to address the following:

- eliminate discrimination and work towards equal opportunities for disabled people,
- encourage good practice in the treatment of disabled people,
- review the DDA in practice,
- investigate and take action in discrimination cases and manage a conciliation service.

The Commission offers a number of services:

- a website with all the relevant legislation and guidance, all the DRC publications available to download, and up-to-date news and information on the work of the Commission – [www.drc-gb.org](http://www.drc-gb.org),
- a helpline which provides advice and information to all callers, whether disabled people or employers and service providers:  
phone 08457 622 633, textphone 08457 622 644,  
email [enquiry@drc-gb.org](mailto:enquiry@drc-gb.org),
- a casework service to help disabled people who feel they have been discriminated against to try to resolve their issues – contact the helpline to access this service,
- legal representation in courts and tribunals for disabled people whose cases are of strategic importance and will test or change the law.

The Government has announced plans to merge the DRC, the Equal Opportunities Commission (EOC) and the Commission for Racial Equality (CRE) into one Equality and Human Rights Commission, probably in late 2007. It is presently unclear what effect this will have on the service available to disabled people.

## **Recent changes to the Disability Discrimination Act 1995**

### **Definition**

The definition of disability was changed on 5 December 2005:

- the requirement that mental illness be clinically well recognised was removed,
- any person with cancer, HIV infection or multiple sclerosis is deemed to have a disability effectively from the point of diagnosis.

During 2006 the DRC will be consulting on what further changes might be made to the definition of disability.

### **Education**

The Education (Additional Support for Learning) (Scotland) Act 2004 introduced from November 2005 a new framework to replace the previous scheme based on Record of Needs. The term 'Additional Support Needs' covers any child or young person who, for whatever reason, needs extra support, long term or short

term, to 'benefit from school education'. The aim is to give children and young people the opportunity to develop personally and help them work to achieve their full potential, and is not just about academic achievement. The new framework includes duties on education authorities to assess and make arrangements for children or young people who have enduring, complex or multiple barriers to learning and who require support from at least one service from outwith education. These children and young people must have a new statutory Co-ordinated Support Plan. There is a new Additional Support Needs Tribunal to deal with disagreements about Support Plans. The Code of Practice 'Supporting Children's Learning' was published in August 2005 and is available on [www.lts.org.uk/inclusiveeducation](http://www.lts.org.uk/inclusiveeducation).

For further and higher education, the duty to make physical alterations came into force in September 2005. Since then, education providers have had to make reasonable adjustments to their premises where there are physical features that are placing disabled students at a substantial disadvantage.

## **Goods and Services**

From October 1<sup>st</sup> 2004 service providers have to have taken reasonable steps to remove, alter, or provide reasonable means of avoiding physical features that make it impossible or unreasonably difficult for disabled people to use a service. What this actually means in practice has not yet been tested in court, although the DRC is supporting a case in which court proceedings have recently been raised.

The Disability Rights Commission has revised the existing Code of Practice, which gives practical guidance on the Disability Discrimination Act to providers of goods, services and facilities to include the new duties on landlords and private clubs which come into force at the end of 2006.

A new Code of Practice explaining the new laws regarding discrimination and transport has now also been issued, with the law coming into force at the end of 2006.

A new questionnaire procedure was introduced from 5<sup>th</sup> December 2005 for court actions raised under Part III of the DDA, similar to the questionnaire procedure already available in employment tribunals.

## **Employment**

From October 2005, direct discrimination has been covered under the employment provisions in the DDA. It is direct discrimination to treat a disabled person less favourably, on grounds of disability, than a person not having a disability whose relevant circumstances including his/her abilities, are the same as, or not materially different from, those of the disabled person. Direct discrimination cannot be justified. Direct discrimination occurs when the reason for the less favourable treatment in question is the disability, while disability related discrimination occurs when the reason relates to the disability but is not the disability itself.

Harassment is now a specific separate head of claim. It is defined as unwanted conduct for a reason relating to the disabled person's disability which has the purpose or effect of violating the disabled person's dignity, or creating an intimidating, hostile, degrading, humiliating or offensive environment.

Important changes have also been introduced to allow claimants at an employment tribunal to have the burden of proof shifted to the respondent. Such a request can be made if the claimant proves facts from which the tribunal could conclude, in the absence of an adequate explanation, that the respondent has acted in a way which is unlawful.

## **Public Sector Disability Equality Duty**

The DDA 2005 introduces the public sector disability equality duty from December 2006. Under the duty, public bodies will be required to carry out their functions with 'due regard' to the need to: eliminate discrimination against and harassment of disabled people; promote greater equality for disabled people; promote positive attitudes to disabled people; and encourage disabled people to participate in public life. The disability equality duty is broadly similar to the race equality duty already in place. An equivalent gender equality duty will be introduced in 2006.

## **Right to Apply to Carry Out Work on Private Rented Property to Accommodate Disability**

The Disability Discrimination Act 2005 added a right for tenants in the private rented sector to apply to carry out disability-related work in England and Wales. However, since housing is a devolved matter, this is an issue which the Scottish

Parliament have legislated on for Scotland. The Housing (Scotland) Act 2006 has given private tenants in Scotland the right to apply to carry out work needed for the accommodation, welfare (including wellbeing), or employment of a disabled occupant. The landlord cannot unreasonably withhold his/her consent to the work. Again, this should come into force at the end of 2006.

## **Other Relevant Legislation**

### **Care Management and Assessment - Summary of Practice Guidance**

Published by the Department of Health, the Social Services Inspectorate and the Scottish Office Social Work Services Group (1991), this guidance is concerned that services should strive to meet the needs of disadvantaged individuals more effectively.

*'In the past mainstream services have not satisfactorily addressed the needs of disabled people and those from black and minority ethnic communities...if agencies are to take full advantage of the opportunities offered by care management to rid themselves of discriminatory practices they will require policies, priorities and objectives framed with representatives from these disadvantaged groups.'*

It should be noted that people have a legal right to have access to information held about them by social work departments and health boards etc.

### **Access to Personal Files (Social Work) (Scotland) Regulations 1989**

As far as social work files are concerned this is the relevant legislation. It was added to by the Scottish Office Guidance to Local Authorities from the Social Work Services Group (Circular SW2/89).

Under these two pieces of legislation people have a right to see and, if requested, have copies of information held by the Social Work Department, including files, Community Care Assessments etc. There are some restrictions on the type of information, for example, if a third party is identified his/her permission must be obtained before disclosure. The same applies to information provided by other professionals, for example, General Practitioners and others. The Social Work Department must respond within 40 days.

## **Access to Health Records Act 1990**

As far as health records are concerned, this is the relevant empowering legislation and specifically in Scotland, **Access to Health Records (Steps to secure compliance and complaints procedure) (Scotland) Regulations 1991, Statutory Instrument 1191/2295**. Applications have to be in writing and a response should be received within 21 days if it is recent information or 40 days otherwise. It is important to note that people do not have a right to information older than 1<sup>st</sup> November 1991, the day the Act came into effect.

## **Chronically Sick and Disabled Persons Act (Scotland) 1972**

Anyone who uses any social work service is entitled to be told by the Social Work Department of any other services which the local authority provides which might be relevant to his/her needs. The Department is also expected to inform people about any other services that they are aware other organisations provide.

## **Disabled Persons (Services, Consultation and Representation) Act 1986**

S1(2)(b) of the Chronically Sick and Disabled Persons Act (Scotland) 1972 as amended by S9 of the Disabled Persons (Services, Consultation and Representation) Act 1986. This is potentially important as it says that there is a clear duty on social work departments to 'ensure' that people receive this information (rather than, for example, leaving it up on notice boards).

## **Children (Scotland) Act 1995**

The Regulations and Guidance to this Act state that local authorities must have published information about relevant services they provide for children, including disabled children, by 1<sup>st</sup> April 1998. By this date they must also have produced children's services plans. Information should also include details of services provided by voluntary organisations or others, if those services are ones which the authority has the power to provide.

## **Freedom of Information (Scotland) Act 2002**

The Scottish Parliament passed the Freedom of Information (Scotland) Act 2002, and it came into force in January 2005. This means that all Scottish

public bodies must provide information to members of the public when it is requested, with very limited exceptions. Where reasonable, there is a duty to provide the information in alternative formats. There is also a specific duty to assist individuals who may need help to make their request and a recognition that not all requests will be in writing.

## **Data Protection Act 1998**

Under the Data Protection Act 1998 individuals have the right of access to records kept about them, and the right to prevent or stop processing of personal data that is likely to cause damage or distress.

Individuals are entitled to know what information is held about them, how it is used, and who it may be passed to.

Explicit consent is needed to store or process 'sensitive personal data'. That is, information relating to the following:

- racial or ethnic origin,
- political opinions,
- religious beliefs,
- trade union membership,
- health,
- sexuality and sex life,
- offences and convictions.

Consent is not required to store information that is not classed as 'sensitive personal data'. For example, name and address, as long as only accurate data that is necessary for a service to be provided is recorded.

Further information on the Data Protection Act is available from the Information Commissioner at [www.informationcommissioner.gov.uk](http://www.informationcommissioner.gov.uk)

The Scottish Information Commissioner is responsible for enforcing the new right to access public information created by the Freedom of Information (Scotland) Act. Further information is available at [www.itspublicknowledge.info](http://www.itspublicknowledge.info)

## **The Human Rights Act 1998**

This Act provides rights to disabled people, though in fairly limited circumstances. Perhaps some of the more important are the following:

- the right to life,
- the right to private and family life,
- the prohibition of torture and inhuman and degrading treatment,
- the right to non-discrimination (though this is only triggered where another right exists).





**Scottish Accessible  
Information Forum**

## **Self-Assessment Checklists**

## Self-Assessment Checklists

These self-assessment checklists are designed to help you evaluate your present service against the Standards. There is a simple yes/no box and we have also included boxes which will help you plan future development. You can list the file or reference number of any supporting documentation that shows how you meet the Standard.

We hope the checklists will help you to review your service on a regular basis.

The checklists are available in a database format on CD Rom with a built-in reporting facility to help you monitor progress in implementing the Standards.

## Checklist 1 Governing to Ensure Accessibility

The Standard	Yes No	Target Date	File/reference number
<b>1.1 Defining Your Service</b>			
Do you have a clear statement of the values that underpin your service and the role that your organisation hopes to undertake?			
Does this include: <ul style="list-style-type: none"> <li>• why you are providing a service?</li> <li>• who your service is for?</li> <li>• the type of service you are providing?</li> <li>• what you hope to achieve?</li> </ul>			
Are all staff, volunteers and managers aware of these objectives?			
<b>1.2 Equal Opportunities</b>			
Do you have a clear statement of intent with regard to achieving equal opportunities in your employment practice, governing structures and in your service strategy?			
Does this include a commitment to meeting the needs of all parts of the community including disadvantaged groups and those experiencing discrimination (except where your service is clearly defined as for a particular sector of the community)?			
Does your policy explain how you intend to implement it and how you intend to measure your effectiveness in implementing this policy?			
Are all of the other policies and practices within your agency			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference number</b>
consistent with your equal opportunities policy?			
Are all staff, volunteers and managers aware of this policy?			
<b>1.3 Service Planning</b>			
Do you have a clear service plan for using your current resources?			
<p>Does this include an outline of the service to be provided:</p> <ul style="list-style-type: none"> <li>• is it office based, do you have a telephone helpline and do you provide an outreach service and/or home visits?</li> <li>• when your service is available, what are the opening hours?</li> <li>• the levels of information or advice you offer?</li> <li>• the number of cases each advice worker can take on?</li> <li>• the areas of information or advice which you cover?</li> <li>• how you co-operate with other agencies?</li> <li>• any wider targets which you have and how these will be achieved?</li> </ul>			
<b>1.4 Service Review</b>			
Do you regularly review your work against the targets and indicators set in the service plan?			
Are the results of such reviews made available in a publicly accessible form at least once a year?			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference number</b>
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The Standard	Yes No	Target Date	File/reference number
<b>1.5 Forward Planning</b>			
Do you have an outline strategy to provide a background against which your agency can both review its performance and take decisions about its future?			
Is this sufficient to inform decisions about staffing levels, office locations, computer purchases etc?			
<b>1.6 Independent Information and Advice</b>			
Does your service comply with requirements for independent advice set down by an appropriate national agency? (e.g. Citizens Advice Scotland, UPDATE, Advice UK and the Telephones Helpline Association)			
Do your users know of any limitations in the advice you provide?			

## Checklist 2 Developing Your Service to Ensure Accessibility

The Standard	Yes No	Target Date	File/reference number
<b>2.1 Premises (only for organisations providing public access to their premises i.e. not helplines)</b>			
Do you have procedures to review the appropriateness of your premises regularly?			
Do these include: <ul style="list-style-type: none"> <li>• a suitable location that it is relevant to the agency's catchment area?</li> <li>• accessibility for those with physical or sensory impairments or reading and communication difficulties?</li> <li>• adequate resources such as confidential interview rooms?</li> </ul>			
Is this produced as an action plan or strategy paper?			
Do your current premises have: <ul style="list-style-type: none"> <li>• adequate public reception and waiting room areas?</li> <li>• private interviewing facilities that are sound-proofed?</li> <li>• a private office for follow-up work?</li> <li>• accessible toilet facilities?</li> <li>• the means of keeping children accompanying their parents occupied, e.g. crèche facilities or toys?</li> </ul>			
<b>2.2 Service Delivery</b>			
Do you regularly review the delivery of your service to ensure access and the effective use of resources?			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference number</b>
Does this include consideration of delivering your service through: <ul style="list-style-type: none"> <li>• telephone/textphone helplines?</li> <li>• email, fax and SMS enquiries?</li> <li>• the internet?</li> <li>• home visits?</li> <li>• outreach premises?</li> </ul>			
<b>2.3 Hours of Opening</b>			
Do you regularly review your hours of service to ensure that these meet the needs of your current and potential service users?			
<b>2.4 Service Promotion</b>			
Do you produce a marketing plan or promotional strategy as part of your service plan?			
Do you have a separate budget head for all promotional work?			
<b>2.5 Alternative Formats</b>			
Are you able to provide information in a range of formats that are appropriate to the needs of disabled people?			
Are service users aware how long they are likely to wait for information in alternative formats?			
<b>2.6 Interpretation</b>			
Do you have clear procedures for the use of interpreters to ensure that they accept and abide by the agency's confidentiality policy?			
Do you make information available in appropriate community languages?			

The Standard	Yes No	Target Date	File/reference number
<b>2.7 Information for Children and Parents</b>			
Do you ensure that all information that affects children directly is provided in a format that adults and children can look at together and/or that children can read or listen to themselves?			
<b>2.8 Referral Arrangements and Relationships with other Providers</b>			
Do you maintain regular contact and liaison with other providers in your locality?			
Have you established formal referral agreements with other agencies to ensure that service users receive a consistent and seamless service?			
<p>Do these formal referral agreements include:</p> <ul style="list-style-type: none"> <li>• how the referral will be made, including that it is to a named individual and the date of any appointment?</li> <li>• grounds for acceptance or rejection?</li> <li>• the respective responsibilities of referrer and referee?</li> <li>• any information the referring body can expect at the end of a particular case?</li> <li>• the right of the individual to return to the original agency if they are not satisfied with the referral?</li> </ul>			

## Checklist 3 Managing Your Service to Ensure Accessibility

The Standard	Yes No	Target Date	File/reference Number
<b>3.1 Managing your Service</b>			
Do you have a written description of your management structure?			
Do you maintain an office manual that collates details of office practice and that is readily available to all staff and managers?			
Is responsibility for the maintenance of this manual clearly assigned in your management structure?			
<b>3.2 Managing and Training Your Workers</b>			
Do you document, in a job description, the skills, knowledge and experience required by advisers and other staff, and the tasks they are required to perform?			
Do you have an annual performance appraisal system for staff and volunteers? Do you evaluate performance against each member of staff's responsibilities and objectives? Do you have a method by which you can act upon these appraisals?			
Do you have a written training policy that ensures that: <ul style="list-style-type: none"> <li>• advisers are trained to a level of competence appropriate to their work?</li> <li>• training needs are assessed for each person against your agency's service objectives and reviewed at least annually?</li> </ul>			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference Number</b>
<ul style="list-style-type: none"> <li>• written training records are maintained?</li> <li>• a budget is identified and maintained for this purpose?</li> <li>• your agency has contingency plans in the event of new legislation being introduced that affects the areas of advice undertaken?</li> </ul>			
<b>3.3 Confidentiality and Access to Information</b>			
<p>Do you have an effective policy on confidentiality that details:</p> <ul style="list-style-type: none"> <li>• the extent of the policy and the circumstances under which information may be passed on?</li> <li>• what these circumstances may be?</li> <li>• how breaches of confidentiality will be dealt with?</li> <li>• the forms of authority required that will enable the agency to speak or act on behalf of the service user?</li> <li>• how service users will be kept informed of any information that has been passed on to third parties?</li> </ul>			
<p>Do you have a clear policy on access to information including what information is held about clients, and how the service user may access this information?</p>			
<b>3.4 Information Resources</b>			
<p>Do you have arrangements to ensure that advisers have ready access to up-to-date reference materials and appropriate journals?</p>			
<p>Do you clearly designate, within your services plan, responsibility for</p>			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference Number</b>
maintaining and updating information resources?			
<b>3.5 Case Management</b>			
<p>If you are an advice provider do you have a case management system that allows you to:</p> <ul style="list-style-type: none"> <li>• identify and trace all documents relating to a case?</li> <li>• identify conflicts of interest?</li> <li>• monitor the number of cases and type of case undertaken by each adviser to ensure that they are within his/her capacity?</li> <li>• record centrally any key dates in cases to ensure that action is taken in appropriate time by the adviser, or, in his/her absence, the agency?</li> <li>• ensure that action taken can be easily verified?</li> <li>• ensure that there is proper authorisation and monitoring of undertakings given on behalf of the agency?</li> </ul>			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference Number</b>
<p>If you are an advice provider, do you have a systematic means of handling cases that can:</p> <ul style="list-style-type: none"> <li>• identify the needs of the service user?</li> <li>• identify what action is to be taken?</li> <li>• identify who will be responsible for the case?</li> <li>• identify key dates in the matter?</li> <li>• identify how and when the service user will be kept informed?</li> <li>• report and confirm in writing to the service user on the outcome, explaining any action the service user should now take?</li> <li>• return to the service user any original documentation except where the service user has agreed that the agency should maintain this information?</li> </ul>			
<b>3.6 File Review</b>			
<p>Do you have arrangements for case files to be reviewed by a supervisor or other adviser who has not been involved in the day-to-day conduct of the case?</p>			
<b>3.7 Identifying Outcomes</b>			
<p>Do you identify, record and report on the outcomes of your work?</p>			

## Checklist 4 Involving Disabled People and their Representatives

The Standard	Yes No	Target Date	File/reference number
<b>4.1 Feedback From Service Users</b>			
Do you have procedures for actively encouraging feedback from service users?			
Do you make provision to ensure that consultation includes people: <ul style="list-style-type: none"> <li>• with a visual impairment?</li> <li>• with a hearing impairment?</li> <li>• with dual sensory impairments?</li> <li>• with impaired mobility?</li> <li>• with learning difficulties?</li> <li>• with specific literacy difficulties such as dyslexia?</li> <li>• with limiting illnesses such as HIV or epilepsy, etc?</li> <li>• with mental health difficulties?</li> <li>• who are representatives of disabled people?</li> </ul>			
Do you have a systematic means of monitoring such feedback?			
Do you have a means of incorporating such feedback within your service plan?			
Do you publicise any changes to services arising from feedback from service users?			
<b>4.2 Complaints and Rights of Redress</b>			
Do you have an effective complaints procedure, which is publicised and made available to all service users in an accessible format?			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference number</b>
Do you have systematic means of analysing and monitoring information from complaints?			
Is information from complaints incorporated into the service plan?			
Are any changes in service arising from complaints publicised?			
Do you have professional indemnity insurance that ensures service users are not disadvantaged by any mistakes your agency may make?			
<b>4.3 Planning with Disabled People</b>			
<p>In the past 12 months have you made any provisions to supply information about your service to people:</p> <ul style="list-style-type: none"> <li>• with a visual impairment?</li> <li>• with a hearing impairment?</li> <li>• with dual sensory impairments?</li> <li>• with impaired mobility?</li> <li>• with learning difficulties?</li> <li>• with specific literacy difficulties such as dyslexia?</li> <li>• with limiting illnesses such as HIV or epilepsy, etc?</li> <li>• with mental health difficulties?</li> <li>• who are representatives of disabled people?</li> </ul>			
<p>In the past 12 months have you made arrangements to consult about your service or service developments with people:</p> <ul style="list-style-type: none"> <li>• who have a visual impairment?</li> <li>• who have a hearing impairment?</li> <li>• who have dual sensory impairments?</li> <li>• who have impaired mobility?</li> </ul>			

<b>The Standard</b>	<b>Yes No</b>	<b>Target Date</b>	<b>File/reference number</b>
<ul style="list-style-type: none"> <li>• who have learning difficulties?</li> <li>• who have specific literacy difficulties such as dyslexia?</li> <li>• who have limiting illnesses such as HIV or epilepsy, etc?</li> <li>• who have mental health difficulties?</li> <li>• who are representatives of disabled people?</li> </ul>			

## Useful Contacts

This section includes some addresses that may be useful to you in developing the Standards in your organisation or locality, or in ensuring access to information and advice services.

### **Advice Services Alliance (ASA)**

*The ASA is the umbrella organisation for independent advice services in the UK. It has carried out research into the application of Standards and Quality Assurance systems by information and advice providers.*

12<sup>th</sup> Floor, New London Bridge House, 25 London Bridge Street,  
London SE1 9SG

Tel: 020 7378 6428  
Fax: 020 7407 6822  
Email: [info@asauk.org.uk](mailto:info@asauk.org.uk)  
Website: [www.asauk.org.uk](http://www.asauk.org.uk)

## **Advice UK**

*Advice UK is the UK's network for independent advice centres. It provides a range of training and support services to information and advice providers.*

12<sup>th</sup> Floor, New London Bridge House, 25 London Bridge Street,  
London SE1 9SG

Tel: 020 7407 4070  
Fax: 020 7047 4071  
Email: [general@adviceuk.org.uk](mailto:general@adviceuk.org.uk)  
Website: [www.adviceuk.org.uk](http://www.adviceuk.org.uk)

## **Citizens Advice Scotland (CAS)**

*CAS is Scotland's support service for Citizens Advice Bureaux, providing training and other support services to CABx in Scotland.*

1<sup>st</sup> Floor, Spectrum House, Powderhall Road, Edinburgh EH7 4GB

Tel: 0131 550 1000  
Fax: 0131 550 1001  
Email: [info@cas.org.uk](mailto:info@cas.org.uk)  
Website: [www.cas.org.uk](http://www.cas.org.uk)

## **Disability Rights Commission (DRC)**

*The DRC is an independent body established by Act of Parliament to eliminate discrimination faced by disabled people.*

DRC Helpline, FREEPOST, MID 02164, Stratford upon Avon CV37 9BR

Tel: 08457 622 633

Fax: 08457 778 878

Text: 08457 622 644

Email: [enquiry@drc-gb.org](mailto:enquiry@drc-gb.org)

Website: [www.drc-gb.org](http://www.drc-gb.org)

## **HomePoint**

*HomePoint aims to improve the scope and quality of housing information and advice throughout Scotland. It has developed the National Standards for Housing Information and Advice Providers.*

Communities Scotland, Thistle House, 91 Haymarket Terrace, Edinburgh EH12 5HE

Tel: 0131 313 0044

Fax: 0131 479 5355

Email: [homepoint@communitiesscotland.gsi.gov.uk](mailto:homepoint@communitiesscotland.gsi.gov.uk)

Website: [www.homepoint.communitiesscotland.gov.uk](http://www.homepoint.communitiesscotland.gov.uk)

## **Information Commissioner**

*The Information Commissioner oversees the Data Protection Act 1998 and maintains the Data Protection Register.*

Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF

Tel: 01625 545 700

Fax: 01625 524 510

Email: [mail@ico.gsi.gov.uk](mailto:mail@ico.gsi.gov.uk)

Website: [www.ico.gov.uk](http://www.ico.gov.uk)

## **Scottish Accessible Information Forum (SAIF)**

*SAIF promotes and provides guidance for the provision of accessible information for disabled people and carers.*

The Scottish Consumer Council, Royal Exchange House, 100 Queen Street, Glasgow G1 3DN

Tel: 0141 226 5261

Fax: 0141 221 0731

Text: 0141 226 8459

Email: [info@saifscotland.org.uk](mailto:info@saifscotland.org.uk)

Website: [www.saifscotland.org.uk](http://www.saifscotland.org.uk)

## **Telephone Helplines Association**

*The Telephone Helplines Association assists helplines to develop services, providing guidance and quality standards.*

Citizens Advice Direct, 2<sup>nd</sup> Floor, 88 Bell Street, Glasgow G1 1LQ

Tel: 0141 553 5532

Fax: 020 7089 6320

Email: [info@helplines.org.uk](mailto:info@helplines.org.uk)

Website: [www.helplines.org.uk](http://www.helplines.org.uk)

## **UPDATE**

*UPDATE collates and disseminates disability and impairment-related information to first tier information providers throughout Scotland.*

27 Beaverhall Road, Edinburgh EH7 4JE

Tel: 0131 558 5200

Fax: 0131 558 5201

Text: 0131 558 5202

Email: [info@update.org.uk](mailto:info@update.org.uk)

Website: [www.update.org.uk](http://www.update.org.uk)

## Other Useful SAIF publications

- Making E-communication Accessible,
- Guide to User-Led Reviews,
- Scottish Formats Resource - CD Rom,
- Barrier Free Information – How to Develop Your Local Accessible Information Strategy,
- Making Information Accessible – poster,
- Using an Information or Advice Service – easy-to-understand A5 booklet,
- What Disabled People Should be Able to Expect from Disability Information and Advice Services - A5 booklet.

In addition to the alternative formats for these Standards, they are also available on a double CD Rom. On these CDs are the Standards in Microsoft Word, HTML, PDF and audio, together with a database and reporting facility for the checklist.

All of these and other SAIF publications are free and available directly from SAIF – contact details on page 2.

## Feedback

SAIF is very keen to get your views on these Standards. Please email any comments you have to [info@saifscotland.org.uk](mailto:info@saifscotland.org.uk), use the feedback form on our website at [www.saifscotland.org.uk](http://www.saifscotland.org.uk), or write to us at the address on page 2.