

Meeting Title:	Citizens Advice – Trading Standards Working Group
Date:	Tuesday 17th April 2018
Time:	10:30 – 13:30
Location:	200 Aldersgate London
Attendees	<p>Citizens Advice: Karen Wilkinson , Tom Ballard, Jon Walters & Leanne Dullard (Minutes)</p> <p>Mel McGinn and Alex Smith (Consumer Education)</p> <p>Samantha Greenland (Torfaen Delivery Centre Operations Manager)</p> <p>Carol Rice (BEIS),</p> <p>Gerry McNamara (CAD/CAS)</p> <p>Pam Wood Representing the North West (Lancashire TS); Gina Green, South East (Bucks and Surrey TS); Tracey Johnson NETSA (Gateshead TS/CS) ; Ivan Hancock Rep SWERCOTS, ACTSO (Dorset), Judith Gordon & Susie Helliwell (Hertfordshire TS); Nicola Tudor rep LOTSA (Tower Hamlets TS), Jane Connor rep YAHTSG (Doncaster TSS)</p>
Apologies	Elizabeth Smeed, Simon Sumner, Andrew McConnell, Ken Daly, Georgina Heath, Dai Jones

UPDATE AND ACTIONS FROM THIS MEETING

1. Welcome and introductions (Karen Wilkinson)

Karen Wilkinson welcomed everyone to the meeting. Everyone introduced themselves.

2. Outstanding actions from last meeting

No	Action	Owner
1	<p>Melanie McGinn to check whether Advisor magazine gets sent out to CAS and send out email to CAS to confirm.</p> <p>Update: There are currently no subscribers to the advisor magazine in CAS and this is not a part of the membership package. If anyone does wish to subscribe, they can do so on an individual basis. Mel has since sent the link to Gerry so action Complete.</p>	MM
2	<p>Karen Wilkinson or Tom Ballard check whether we can get email addresses through reports on the Partner Portal.</p> <p>Update: Complete You can use the SEN02 - Case Enquiry report on the Partner Portal to get client's case information but this report <u>does not</u> provide an email</p>	KW / TB

	<p>address. If this information is need, you can contact the Operations team and they will look into it.</p>	
3	<p>Allison Dunstan or Karen Wilkinson look into the CA Consumer Service business process for adding trader information to cases on Flare and clarify the process.</p> <p>Update: Alli Dunstan has reviewed and updated the trader process however we are awaiting the outcome of GDPR before releasing the new version.</p>	AD / KW
4	<p>Karen to set TSWG dates for the year and send out a list of the dates to the group.</p> <p>Update: KW has confirmed verbally that the dates have been booked and has provided the dates in the meeting however an email will be sent to confirm them.</p>	KW

3. Consumer Education update, including an update from the Campaigns team

Please see Consumer Education slides [attached](#)

Melanie McGinn discussed that Consumer Education (CE) were delivering some training sessions to the network on What is Consumer Education, who is within the landscape and how important the intel from CE is to the consumer service and Trading standards.

Melanie McGinn discussed how the CE team were supporting the consumer network and more information on this can be found within the attached slides.

Alex Smith from the campaigns team discussed two adviser magazine articles have been published. The first relates to illegal streaming & Kodi boxes, looking at the impact that this has on consumers, the second article relates to Boiler Plus, looking specifically at the Government's response to Heat in Buildings consultation and how this impacts consumers.

Alex advised that work was underway to prepare for scams awareness month, with the education materials currently being developed. The team are hoping to have the material ready for the end of April.

Alex also added that the team were delighted to welcome Tracey Johnson to the Advisor Editorial Board consumer team.

4. Performance and operations update

Please see Performance and Operations slides [attached](#)

Karen Wilkinson discussed that the focus for Operations team remains on ensuring quality of advice, data and referrals meets expectations. Customer satisfaction and partner satisfaction levels remain high, and quality targets are now being met. The Operations team are focusing on enhancements to the service and development of staff.

Karen explained that the service was impacted by the “Beast from the East” adverse weather between 28th February and 2nd March. She advised that six of the ten centres in Scotland, England and Wales had to close during this time with many of the other centres running on skeleton staff due to limited public transport and staff childcare affected as schools were closed. Karen went on to explain that a decision was taken to utilise callbacks throughout the 1st and 2nd of March, as a contingency to allow us to handle the volume of calls received and help those most vulnerable as a priority. Once all of the centres were operating again, the call backs were distributed nationally to ensure that all clients received a call back to resolve their problem as quickly as possible. Lines regarding the extended response times to webforms were added to our website to manage client expectations during that time and as a result, no complaints were received.

Karen explained that following on from the weather issues, it allowed Citizens Advice to review their Business Continuity plans in case of any similar issues in the future. She also added that despite the problems with the weather the Operations Team were all able to support each delivery centre remotely and were able to continue to operate as normal despite the weather.

Karen explained that in March there was a Team Leader away day to allow Team Leaders from each of the delivery centres the opportunity to share best practice, understand how each of the delivery centres manage their teams and also build on their relationships to be able to support each other in the future. Karen advised that the day was greatly received and well attended with representatives from each of the centres in Scotland, Wales and England. Since the meeting a Team Leader hangout group has been created to allow for questions to be asked, hints and tips to be shared and additional support to be offered where required. Subsequent conference calls have also been arranged since the meeting to discuss improving quality.

Karen explained that KPIs are monitored on a weekly and monthly basis. Case notes have been a focus with a mini project put in place to help improve the quality of the notes taken by advisers. The project has proven successful so far and there is more information about this under the case notes agenda item.

Tom Ballard and Karen Wilkinson noted the performance figures for March despite the poor weather conditions at the beginning of the month, were looking much more positive. They added that the quality KPI had been achieved by the service for six consecutive months. They also went on to add that PSAT levels had been achieved and that it was encouraging to see the partner feedback levels decreasing across the service. Karen advised that referral levels have remained consistently high at 40% nationally which is great to see from the delivery centres.

The consumer service is due to migrate to the new telephony platform in June. The new platform will offer much more functionality for the centres.

Samantha Greenland introduced herself as the Operations Manager for the Torfaen Citizens Advice consumer service delivery centre. She spoke about her experience of working as part of Trading Standards in previous roles and how that experience helped her move in to the role of Operations manager for the delivery centre. Sam added that the main point that struck her once the centre was live is how difficult the adviser role is. She went on to explain that the amount of information that the advisers need to absorb in order to provide accurate advice and ensure that their notes and RNS action is correct is something she did not expect to be so difficult and she has the utmost respect for her advisers in what can be challenging circumstances. Sam believes that the partner feedback is invaluable to the team in order to continue to improve their quality and has welcomed any trading standards officers to visit her site at anytime to see how the service is managed.

5. Case Notes Mini Project

Please see the slides for the case notes mini project [attached](#)

Leanne Dullard explained that there had been a variation in case notes between the delivery centres and advisers for a period of time. Case notes have historically scored lower on the partner satisfaction surveys and on Trading Standards audits, so we recognised that this area in particular needed to be addressed and some consistency sought.

Leanne went on to explain that the key messages delivered to the centres was that our partners require clear case notes in order to make the most of the shared intelligence, clients can request to have a copy of their case notes so we must ensure that the information documented is factually correct as these could be used in court and finally that case notes must be impartial and a true reflection of the conversation held with the client.

Leanne went on to discuss the actions taken so far with the project and also the longer term aims. This information can be found in the attached slides.

6. Referrals and Notifications

Please see the referrals and notifications slides [attached](#)

Tracey Johnson has undertaken some work in this area following on from the January meeting. In that meeting referrals were tracking at 41.74% of complaints to the service. Tracey was keen to understand whether or not the service was selling themselves short by not including notification data in the figure of complaints reported.

Around the table discussion took place to understand if the rest of the group felt that notifications were important and more so if they were relevant. Some authorities advised that due to a lack of resources they

were unable to spend as much time as they would like on their notifications and in comparison other authorities confirmed that they regularly checked theirs and found the data very useful. Carol Rice (BEIS) added that it would be good to see the full picture in terms of how many notifications are being sent on a monthly basis.

Tom Ballard suggested that it might be useful for one of the authorities to produce a case study or something similar on how notifications are used which can then be presented at the next meeting.

Action: Tom Ballard and Jon Walters to think about how notifications can be reported and both will be happy to look at possible ways to include the data moving forward. Both will also look at the possibility of producing an impact report as the group confirmed that it would be good to see where a case started and follow it through to completion including how any funding impacted the case

Action: TS authorities to agree who will produce a case study on the use of notifications and confirm that they will present to the group in the next meeting.

7. Consumer service development plan

Please see the consumer service development plan slides [attached](#)

Tom Ballard is responsible for the development plan for the service however now that Jon Walters has returned from parental leave he will be taking more of a lead on driving the project. The consumer service will be attending the TSI symposium in June and will be talking with partners on our development plan for the service.

With regards to Web Intelligence development plans, Tom discussed that the development of online tools will be based on the pre existing Second Hand Car Tool. This tool will be enhanced to capture client data which can then feed into TSS as intelligence. The Second Hand Car Tool

will act as a pilot initially, with the potential to expand to other tools like faulty goods covering different areas.

Karen Wilkinson noted that there was a review of the Citizens Advice consumer service training in December with the aim of streamlining the material as it has not been reviewed for a while. There is also now a Training User Group set up which Ailsa Dent is leading on.

Trader referrals were covered in the section above

8. GDPR

GDPR was discussed as per slides of previous meeting in January. The message from Tom Ballard was where possible authorities will need to try and locate their own data sharing agreements as these will be very difficult for us to obtain given they are off site and all paper based. Authorities will need to look in detail at their end for these agreements as we had expected authorities to retain their own copies.

Where this is the case and they do not have a copy we will begin the process of obtaining them from our side although cannot guarantee this will be ahead of 23 May.

Once you have located your agreements, Please read through them carefully and make any necessary changes. Internally the team are working hard to ensure that the consumer service is GDPR compliant ahead of 29th May. Our business processes are being reviewed in line with the guidelines. Once the full details are confirmed we will be in contact to confirm our position.

9. AOB

Tracey Johnson asked if each authority could look to ensure that the telephone numbers listed on their protocols particularly for the duty officer are correct. She has witnessed instances of advisers in Gateshead not being able to contact key contacts listed on protocols as the numbers appear to be incorrect. She has also witnessed instances of advisers getting through to switchboards but being prevented from

being able to select the correct option. It was discussed that this could simply be an issue with the Gateshead telephony platform however it would be worth double checking.

The new green paper for consumer rights has been released. Any comments on this need to be received by 7th July.

Action: Please could all authorities check their key contact telephone numbers are up to date and accurate on their protocols.

Action: Please could a note go out to all delivery centres to add in to their case notes a reason why a case could not be transferred to TS as required - was nobody available, did the phone cut off, did the numbers not work correctly etc. This is useful information for each of the authorities.

The next meeting will be held on Tuesday 17th July

ACTION: Karen to ask Alli Dunstan to set TSWG dates for the year and send out a list of the dates to the group.

Summary of actions from today's meetings:

No	Action	Owner
1	Tom Ballard and Jon Walters to think about how notifications can be reported and both will be happy to look at possible ways to include the data moving forward. Tom and Jon will look at the possibility of producing an impact report as the group confirmed that it would be good to see where a case started and follow it through to completion including how any funding impacted the case	TB/JW

2	Please could all authorities check their key contact telephone numbers are up to date and accurate	All TSS
3	TS authorities to agree who will produce a case study on the use of notifications and confirm that they will present to the group in the next meeting.	All TSS
4	All delivery centres add in to their case notes a reason why a case could not be transferred to TS as required - was nobody available, did the phone cut off, did the numbers not work correctly etc. This is useful information for each of the authorities.	LD