

Meeting Title:	Citizens Advice – Trading Standards Working Group
Date:	Tuesday 23rd January 2018
Time:	10:30 – 13:30
Location:	200 Aldersgate London
Attendees	<p>Citizens Advice: Karen Wilkinson , Tom Ballard, & Ella Blockley Jake Smith & Jo Orsler (GDPR) Mel McGinn and Alex Smith (Consumer Education) Lisa McLain (Caerphilly Delivery Centre Operations Manager) Carol Rice (BEIS), Gerry McNamara (CAD/CAS) Georgina Heath (Lincolnshire TS); Pam Wood (Lancashire TS); Ken Daly (SCOTSS); Gina Green (Bucks and Surrey TS); Elizabeth Smeed (Camden TS); Tracey Johnson (Gateshead TS/CS) ;Paul Dosanjh (Wolverhampton TS); Judith Gordon (Hertfordshire TS / EATSA); Julie MacCarron (East Renfrewshire TS).</p>
Apologies	<p>Ivan Hancock (Dorset) ; Andrew McConnell (Consumer, Competition and Regulation Unit); Simon Sumner (Staffordshire TS); Dai Jones (Wales); Elizabeth Shaw (Suffolk TS); Jenny Rawlinson (Stoke TS); Louise Baxter (East Sussex TS); Susie Child (London TS)</p>

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	Action: Email to the group and distribute when CSAT results are available. Update: Complete	JW
2	Action: To share summary of complaint re relationship between us and TSS - Gina Green Update: Complete	KW
3	Action : Share TSS audit results when they are available and Jon to add information into the 6 month review for BEIS Update: Complete	JW
4	Action: To update the group late Nov early Dec on the three areas noted/Service development Update: On the meeting agenda today	JW/AD
5	Action: Send out comms on protocols review to this group for distribution, adding a small detail on scope of the service Update: Complete	AD
6	Action: AD - To gather data/run a report from the case handling system - how many trader records have trader schemes attached and then how many cases/clients attached to these Update: Complete and details sent to CR	AD

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

Please see Consumer Education slides [attached](#).

Melanie McGinn discussed that Consumer Education (CE) moved into Financial Capability team (Fincap). They are developing CE training pack, in line with Fincap training. Give local Citizens Advice better idea of how Consumer advice incorporates with other areas. Local Citizens Advice can refer to Consumer service, TS or Consumer pages on the public site

There was a discussion of events being run by the CE team. More information on the attached slides.

Melanie McGinn discussed new materials from the CE team. The team worked in partnership with UK ECC and ASA to create resources for National Consumer Week. The campaigns team in Wales created a 'Pass the Parcel' advice tool. There is a new page where Consumer Empowerment Partnerships resources can be found.

Two Adviser magazine articles have been published - more details on slides. Melanie McGinn noted that TS involvement with this would be really helpful for insight. The editorial team meet twice a year and produce two articles every quarter.

Tracey Johnson expressed interest to join Editorial team for Advisor magazine Consumer articles

Georgina Heath suggested that Melanie McGinn and Kate Hobson could try and contact CTSI for additional insight as they cover similar topics in CTSI review.

Julie McCarron asked whether Advisor magazine goes out to CAS.
Melanie McGinn unsure.

ACTION: Melanie McGinn to check whether Advisor magazine gets sent out to CAS and send out email to CAS to confirm.

Carol Rice (BEIS) additionally noted that National Consumer Week went really well, good coverage on social media and a welcome campaign. Andrew Griffiths is the new DCMS minister at BEIS. CPP meeting 10th of January, Scams Awareness Month is the next focus - this is going to be in June. Next meeting of Comms group (BEIS) is in March and planning will begin for Scams Awareness Month then.

Alex Smith from the Campaigns team discussed the Consumer Empowerment Partnerships with local Citizens Advice - more information is on the slides. The aim of the partnerships is to offer resources and tools created for local offices use.

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.

There was the usual seasonal dip in the volume of calls over the festive period in December as expected. TSS audit results consistent with other audits.

Karen Wilkinson explained the relationship between Grant Managers in the Citizens Advice consumer service operations team and the delivery centres in England and Wales.

Karen noted that there has been an increase in collaboration between delivery centres which is really encouraging.

Karen explained that KPIs are monitored on a weekly and monthly

basis. Average Handling Time (AHT) has been a focus with a mini project put in place to address it. The project was successful, a toolkit was developed and centres shared best practice with each other. There is now a Casenotes mini project ready to launch end of January - there is more information about this under PSAT agenda item.

Tom Ballard noted the performance figures so far for January have been positive. Karen noted that the delivery centres have been running recruitment days / open days for new advisors.

A new telephony platform was piloted with Consumer delivery centres in England and Wales. Citizens Advice Adviceline goes live on the new platform at the end of January. Consumer centres due to go on platform in March / April time. The new platform will mean increased functionality for the delivery centres.

Leanne Dullard the former Client Services Manager for Agilisys has recently joined the Citizens Advice consumer service Operations team and is visiting the delivery centres in England and Wales. She brings her experience as having run the service previously and is making observations and recommendations to support the delivery centre management teams.

Lisa McLain introduced herself as the Operations Manager for the Caerphilly Citizens Advice consumer service delivery centre. There are several other telephone projects delivered in their call centre and they have years of experience of working with National Citizens Advice. She spoke about the experience of setting up and delivering the project and lessons learnt. They have 21 full time consumer advisers, 3 team leaders and 1 trainer delivering the service. Advisers are not set targets, the focus is on their quality of advice and advisers behaviours are monitored closely on calls and coaching is provided to improve and support this. Lisa believes this correlates with a high staff retention rate. Partner feedback is invaluable for improving quality of advice

given by advisors. Focus going forward for Caerphilly (and the other delivery centres) would be collaboration between delivery centres and TS in the form of visits and training.

5. New Google feedback form (KW)

Please see Google Feedback Form slide [attached](#).

The operations team are looking to encourage more uptake of the partner feedback form and as such, when a LA sends an old excel form in with feedback we are promoting the benefits of using the new form and sending them a link.

Tracey Johnson noted that she has noticed that a few TS in North East have been unable to use the new feedback form on iPads, but are able to use it on other devices). She also noted that from a delivery centre perspective it is a lot quicker to handle feedback with the new form.

Pam Wood asked whether TS feedback is meant to be added to the case notes as its been noted this does not happen on every occasion. Tom Ballard stated that the wording of feedback does not need to be put into the casenotes verbatim, but a summary of actions taken should be included. The guidance to the delivery centres is that all the relevant information should be in the casenotes, but there is not a firm rule as on occasion it may not be appropriate to do so. Clients can request access to their casenotes so it is not always appropriate for feedback to be pasted in entirety on casenotes.

6. PSAT

Please see the Partner Satisfaction slides [attached](#).

Karen Wilkinson went through the aims of the Case notes project, summarising that the aim is to achieve more consistency with case notes. Lisa McClain asked whether TS will be involved with this review. Karen Wilkinson confirmed Tracey Johnson will be providing support

with the project. It was discussed that there are differences between TS with regards to expectations and perceptions for the quality of casenotes. Tom Ballard noted that this is something that the team will address through the project as its presented before in the regional variance of scoring of cases in TSS audit.

Pam Wood raised a request as to whether it was feasible for car registration numbers to be mandatory on relevant cases. Karen Wilkinson noted that whilst it is not a mandatory field it is a requirement for advisers to get this information in case notes and will be marked down on QA if missing.

Julie McCarron asked about what case information you can access via the Partner Portal if a case is received through SPO / Datamotion Adapter with missing information. Karen Wilkinson and Tom Ballard confirmed you can get all the information through reports on the Partner Portal.

Liz Smeed asked about getting client email addresses through the Partner Portal, as their authority have been unable to do this. Tom Ballard and Karen Wilkinson unsure so this will be checked.

ACTION: Karen Wilkinson and Tom Ballard to check whether we can get email addresses through reports on the Partner Portal. Update: You can use the SEN02 - Case Enquiry report on the Partner Portal to get client's case information but this report does not provide an email address. If this information is needed, you can contact the Operations team and they will look into it.

Gina Green noted that her authority would like questions to be added to Flare or the Partner Portal but she knew it would be unlikely we could change our systems on the request of just one LA.

Gina Green asked whether there was any capacity for Partner Portal training for TS. Tom Ballard noted we cannot run data on behalf of TS, but TS can contact the operations team for assistance and there is also

guidance on the Partner Pages.

Tracey Johnson raised that it would be helpful for delivery centres to have clarity on what Trader details need capturing as there is confusion as to whether the Trader Name is required.

ACTION: AD / KW to look into business process for adding trader information to cases on Flare and to clarify the process.

7. General Data Protection Regulations - GDPR

Please see the GDPR slides [attached](#).

Jo Orsler is leading on the Consumer service workstream of the Citizens Advice GDPR project. If TS have any questions regarding GDPR these can be channeled to Jo Orsler via the Operations mailbox. Jake Smith was also in attendance from Citizens Advice as he is leading on GDPR for the organisation.

Tom Ballard noted that there is a comms plan for partners being developed for GDPR, the comms will include Q & As and will be circulated.

Gina Green raised a query on behalf of one of her authorities - if Citizens Advice share data with TS, does client consent cover TS potential use of data. There was no firm answers to this query, answers are to be confirmed and communicated when aforementioned comms are sent out.

Liz Smeed asked about sensitive client information in the case notes, asked whether TS need to do anything with this information when it hits their organisations databases. Jake Smith noted Citizens Advice will ensure clear guidance is given to advisers about sensitive information in free text; TSS need to ensure that this sensitive data is protected.

Gina Green asked whether personal data consent applies to sole traders and how would this be approached. Jo Orsler noted that

guidance on this would be beneficial and will be shared.

Carol Rice asked about CA raising awareness about GDPR for the general public. From a consumer service perspective work will be done with the advisers to ensure consent is captured from clients with regards to their data.

8. TSS Audit

Please see TSS Audit slides [attached](#).

Georgina Heath discussed the findings from TSS Audit by going through the report which was shared in December.

Karen Wilkinson noted that the cases that were scored as red have been sent to the delivery centres and cascaded out as feedback.

Karen also noted that if when using the feedback form if TS notice a trend is occurring in the feedback, if they make the Operations team aware of it and the team can address it.

Regional variation in the audit results was noted, it may be that this could relate with a variation in individual TS expectations and perceptions of service.

9. Consumer service development plan

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

Tom Ballard is responsible for the 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.

Liz Smeed noted that - with regards to the potential to data share Consumer data collated from local Citizens Advice with TS - intelligence from local Citizens Advice would be something that would be invaluable for particularly for London TS.

10. CSAT

Please see Customer Satisfaction Survey slides [attached](#).

Headline figures from the survey are as follows:

- 2,789 of 3,392 respondents (82%) said that it was 'Easy' or 'Very easy' to access the consumer service.
- 2,800 out of 3,400 respondents (82%) said that they were 'Satisfied' or 'Very satisfied' with the overall service.
- 1,958 out of 3,354 respondents (58%) said that their problem was 'Completely' 'Mostly' or 'Partly' resolved.

11. AOB

No AOB.

Next TSWG if Tuesday 17th April 2018, and the following Tuesday 17th July 2018.

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	Melanie McGinn to check whether Advisor magazine gets sent out to CAS and send out email to CAS to confirm.	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 address. If this information is need, you can contact the Operations team and they will look into it.</p>	KW / TB
3	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.	AD / KW
4	Karen to set TSWG dates for the year and send out a list of the dates to the group.	KW

