

|                       |   |
|-----------------------|---|
| <b>Meeting Title:</b> | Citizens Advice – Trading Standards Working Group   |
| <b>Date:</b>          | Thursday 26 <sup>th</sup> Jan 2017  |
| <b>Time:</b>          | 10:30 – 13:30   |
| <b>Location:</b>      | 200 Aldersgate London   |
| <b>Attendees</b>      | <p>Citizens Advice: Jon Walters (JW) Karen Wilkinson (KW), Allison Dunstan (AD), Mel McGinn, Emma Saunders</p> <p>Carol Rice (BEIS), Daragh Galvin (BEIS),</p> <p>Ivan Hancock - Dorset TSS (rep SWERCOTS and ACTSO), Angela Currie - East Riding TSS,</p> <p>Gina Green, Bucks and Surrey TSS (Trading Standards South East), Pam Wood - Lancashire TSS, Simon Sumner - Staffordshire TSS (rep CEnTSA), Tracey Johnson - Gateshead TSS (rep NETSA), Stewart Gibson (CAS), Sue Bunney - Essex TSS, Ken Daly (National coordinator- Scotland), Liz Smeed, Camden TSS, (LOTSAs), Dai Jones, TSS Wales (rep WHOTS), Sue Wilson, rep EMTS</p> |
| <b>Apologies</b>      | <p>Kim Stephens, Andrew O’Connell, Scottish Gov, Kate Davies, Oxfordshire TSS, Leah Shaw - Norfolk TSS (EETSA), Rebecca Webb - Kent TSS, Georgina Heath - Lincolnshire TSS, Pam Stewart,(CAD)</p>   |

## UPDATE AND ACTIONS FROM THIS MEETING

### 1. Welcome and introductions

Jon Walters (JW) welcomed everyone to the meeting. Everyone introduced themselves.

### 2. Outstanding actions carried forward from previous meetings

All actions completed

### 3. Consumer Education update

including an update from the Campaigns team  
See Consumer Education slide presentation attached, which Mel McGinn presented.

Mel apologies for the delay in providing an update/results on the “Consumer Week Campaign” data, this is still being evaluated.

New format for the Advisor magazine - will be online and paper copy; this will allow for creating and publishing more content.

Edition 179 - 30th Anniversary of the magazine - The changing consumer landscape over the last 30 years, written by Jan Carton. CEP article - this was an additional item to update on the work of the CEPs and how the readership can engage.

Edition 180 - planning in progress - possibly add a Register My Appliance article.

In the next Advisor magazine there is planned to be an article on Trader Schemes - Mel ask the group if they would send her any feedback on the various trader scheme that are affiliated/approved by TSS.

Carol Rice asked – How would anyone get hold of a copy of the Advisor magazine?

Mel noted that the magazine itself is subscription based, but the online version will be free.

Scam Awareness week is in the early stages of being planned, detail is still being looked at and decided – Carol R added that the date would still potentially be July.

National Consumer Week – Nov last year - Be switched on to your rights and product safety when buying electrical goods

Carol Rice asked - is ticketing going to be covered?

CEP are completing some work in this area also there is a bit in the Advisor magazine about this subject. Mel notes that she is in a meeting next week with this on the agenda.

CEA - Twitter poster campaigns, planning for CEA conference - Health and Wellbeing linked to scams tbc

Support the CEPs to deliver their objectives - work with Coventry to develop questionnaire, work with Derby to create Secondary Ticketing toolkit, share links and resources with Stevenage

Promote the Friends of Scams project within the network.

CTSI conference – Harrogate – Health and wellbeing, which will link into scams

Carol Rice adds that she should have some figures/data surrounding NC Week and she can circulate these to the group when they are available – full report should be available by the end of Jan.

Ivan Hancock asked – Scams training seems to be focused in one area/region?

Mel adds that there is online training available, but if individual LA TSS want to make contact then the training can be tailored to each.

Discussions surrounding the various Approved Trader schemes take place – Mel ask the group if they would be willing to review the Advisor magazine Article on this subject, group agree.

Mel discussed Consumer Empowerment activities as per slides.

**Action: Mel to provide links – see below:**

Advisor magazine -

Advisor magazine provides independent expert views on welfare benefits, consumer, employment, housing and money advice. A selection of articles is available online for free at [www.medium.com/adviser](http://www.medium.com/adviser).

If you'd like to read more, a hard copy is available to purchase.

Consumer Education resources

[www.citizensadvice.org.uk/about-us/how-we-provide-advice/our-prevention-work/education/](http://www.citizensadvice.org.uk/about-us/how-we-provide-advice/our-prevention-work/education/)

#### **4. Performance and operations update (JW) (KW)**

See slide presentation attached, presented by JW.

The service has entered transition, and quality, client and partner satisfaction have remained high during the period. Gateshead Centre went live with Energy and Post on Monday the 23<sup>rd</sup>.

Wait times have increased overall but this was expected and the level has plateaued – Jon noted that this has not affected Scotland centres.

Volumes of contacts in terms of demand has fluctuated, with December in particular being lower than forecast, however December is generally a quieter month.

Contingency measures remain in place with additional options ready for

deployment as required and are proving effective in supporting client journeys.

An example is the priority options we have in place on the system for doorstep and safety calls - in December in excess of 5000 calls used this option and the average speed to answer was 18 seconds.

We have used similar high priority option for disconnection cases on our Energy service to similar effect.

Other contingency measures include telephone messaging and recorded advice options and internal re-deployment of resources at Agilisys.

Advisers at new delivery centres will take some time to reach full proficiency however Agilisys will continue to provide telephone resource until July to support overall performance. Once transition of the service concludes, we will be able to return to standard performance dashboard reporting to partners

Client Satisfaction - Qualitative (survey completed on client journey), survey results will possibly be ready by the next meeting to share with the group. Client satisfaction and quality remain good; BEIS have standards that we have to adhere and to deliver to.

Website Volumes - December saw a decrease in overall access to the consumer pages in line with seasonal trends, however numbers of total users were seven percent higher than December 2015

Reporting issues to Trading Standards continues to be the page that receives the greatest number of visits

Volumes are expected to remain consistent with the latter part of 2016 (excluding December) in early 2017.

Reporting portal is still on our radar and being discussed.

**Action: Jon notes that we can try and see if we can arrange a member of the content team to attend the next group meeting.**

Complaint levels from clients have remained low - Karen – we have not seen any significant rises in complaints and none recent upturn in complaints relating to calls being abandoned or clients being unable to contact the service through increased wait times.

Carol Rice asked – How can clients complain? Verbally, in writing/email etc.

Karen explains it will depend really on how the client initially made their complaint but the consumer service can offer anyone of those options.

Complaints are on the whole resolved quickly and informally in centres.

The consumer service has its own complaints process split into 3 stages.

The first stage is informal resolution and is implemented internally by current suppliers in centres.

Stage 1 complaints between Oct - Dec 2016 averaged around 30 - 35 per month for the service as a whole

Of note CAD handle 15% of the total call volume therefore their complaints are usually proportionate around five per month.

Stage 2 complaints are escalated into Operations and volumes for these on average are about one per month.

Stage 3 complaint is where the complaint is passed to an independent adjudicator - the consumer service had just one last year, concerning policy not advice Karen explained that the centres would deal with initial first stage complaints and that Ops deal with escalated complaints. Operations funnel the stage 1 complaints back through to the centres. Some of the complaints may contain different elements such as a complaint about a bureau and the consumer service.

Carol Rice asked- what is Stage 3 complaint is – This is where the complaint in its entirety would be looked at by someone independent of the service.

Carol Rice asked – MP complaints? We do receive complaints from MP about their constituents; these are dealt with in a very similar way.

During the first quarter in 2016 Stage 1 complaints were rising in centres as monthly volumes for the service were averaging around 60 per month. Complaints handling workshop was delivered by Operations to the Agilisys managers, Team Leaders and senior advisors and a review of their process took place. Since then improvement actions and further reviews have taken place monthly and volumes have decreased on the whole.

These complaints workshop training sessions will be delivered to each new centre for consistency

Each centre will have its own complaints champion and a complaints working group will be set up. A shared log has been devised to enable smooth handover of complaints between centres where calls and advice have been delivered from multiple sites as part of the client journey.

Best practice is shared with the Scotland Centres.

JW reassures the group that although wait times have increased, overall performance is not being affected.

Ivan added that there has been some excitement on the performance figures and yes TSS were being patient, however is encouraged for anyone to make contact with CitA over concerns and that the information is shared.

## 5. Transition (JW)

See slide presentation attached, presented by JW.

Overall progress against the project timeline and implementation plan is on schedule with minimal issues arising.

Energy and Post Gateshead went live this week – Monday; we used a staggered approach with advisors taking very limited calls to start with but already this has progressed to some advisors taking in excess of 20 calls per day.

**The large lots** – Gateshead and Manchester - All advisers, management structure and associated roles have been successfully recruited including two from Agilisys. Advisers are currently in training and modular assessment scores have been of a good standard.

Systems installation is almost complete (Flare) and systems testing are underway.

**Standard Delivery centres** - All advisers, management structure and associated roles have been successfully recruited including some from Agilisys

Advisers commence training in February - training plans have been agreed and materials are in place

Accommodation is in place, equipment is currently being procured, installed and tested

Systems installation has commenced and log-ins for the telephone platform have been created.

Carol Rice asked – Has recruitment been easy?

JW responded that some centres are fully resourced, although some found it more of a challenge.

**Small development centres x2** - Recruitment for advisers and team leaders is underway and accommodation arrangements for both training and operations are

being finalised. The equipment and infrastructure is being ordered and delivery/installation dates agreed.

Gateshead Energy and Post went live on Monday 23<sup>rd</sup> Jan – Very positive start. We staggered the calls coming into the centre to start with, although by day 2 the advisors were up to taking 15-20 calls per day.

Quality checks and assessments have and are being undertaken and the whole centre is very enthusiastic.

JW announced to the group that Tracey Johnson (Gateshead TSS) has been appointed as the Relationship Manager – to act as a link between TSS and CitA Gateshead/consumer service more widely. It was agreed that this a very positive step towards working together and it is very good to have someone from this group to enable the information to be shared etc.

Carol Rice asked - which will be the Welsh Language centre.

Cardiff will be the Welsh Language centre. The Welsh centres on the whole have benefited from having many of the Agilisys staff transfer over.

Karen W- It has been very encouraging and very positive so far with 6 Welsh speakers being recruited. Welsh centre generally takes 100 calls per week and has a Service Level of 96% - team leader from Agilisys is transferring over to Cardiff centre and this is very reassuring for us all.

Carol Rice asked – The group have previously held the meetings in a centre, maybe this is something that can happen again?

JW – Yes this is something that can be looked at and arranged.

Centrally we are working with each delivery centre's management team to provide them to support their learning and understanding of our key business processes. Members of the operations team will be on site in the coming weeks to conduct workshops on quality management, complaints, referrals, and reporting. Go-live teams have been assembled to be on-site at each centre on week one, including Implementation and Operations resource.

Floorwalkers are in place for each delivery centre for a number of weeks after go-live for subject matter related assistance.

The partner engagement workshops through November were conducted and feedback from all attendees was positive.

Monthly communications around the progress of the project continue to be sent. We continue to engage with BEIS, National Trading Standards board and other forums to provide updates.

We will circulate a short film for partners with information around transition, (Ivan Hancock was involved in the making of this film), and a partner readiness pack, in February.

**Protocols** - Last year we undertook some analysis of the variance in protocols across our trading standards partners – JW shows the group the analysis chart that was formulated and discussion over the protocols took place.

**Action: JW to share the Excel document of the protocols analysis with the group**

Carol added that she will go back and speak with the policy group as she was provided with this analysis of the protocols previously, however she is unsure if these have yet been looked at.

## **6. Training**

See slide presentation attached, presented by JW.

We have been approached by the national Scams team, as they are keen to offer such training to our advisers

We wanted to hold a discussion with this group to consider any other areas that might be beneficial and consider how these might be prioritised

We would also like to adopt a model of having a local Trading Standards partner visit each of the delivery centres following their go-live.

JW – we would welcome feedback from the group – the group then discuss and various options are put forward.

Safety and Doorstep main priorities at a local level.

Ken Daly notes that Scotland has an Ops group that work between Cita and CAD and TSS – will this training include Scotland? JW- Yes

The new delivery centres training teams will work closely with their counterparts at CAD to consider additional training needs that would benefit the advisers and the service more widely. We are keen to have partners increase their involvement in providing areas for this additional development, in the same way we have conducted sessions in the past and for ease logistically we will largely adopt a ‘train the trainer model.

## **7. Psat**

See slide presentation attached, presented by JW.

The most recent partner satisfaction survey was circulated in November 2016, through email distribution lists and also via our consumer service partner pages. In total we received submissions from 149 respondents, which was an increase from the previous survey where we received 121.



The total satisfaction for each question is listed on the following pages, along with the trend against the previous survey's results in that area.

This will also include a summary of actions recently undertaken in relation to

partner satisfaction. We are working closely with our new delivery centres to ensure they understand the importance of partner relationships and satisfaction

Satisfaction rates will be one of the key measures for the service when gauging the success of transition.

The analysis of the results will be shared with partners, and hosted on the partner pages, in a new format in the next few weeks.

### **8. Service Development – Discussion:**

JW – Transition will need to be the priority, however the consumer service has now been around as a service for over 10 years and generally has been in the same format completing the same things. This discussion follows on from the previous workshops on vulnerable clients and referrals.

Flare enhancements – suggestions

How we handle Web-forms

JW will circulate to the group a list of developments and for the group to look at what's possible using the current resources –discussion at the next meeting to go through this.

Carol Rice –This could be added to the yearend service review.

### **9. Witness service**

See slide presentation attached, presented by David Kenyon - [david.kenyon@citizensadvice.org.uk](mailto:david.kenyon@citizensadvice.org.uk)

Group are welcome to use the contact details noted to share and gain any information.

### **9. AOB**

Gina Green asked about amendments to the portal and if a LA TSS amended and paid for that who would own the report – JW suggested contact with the portal business owner – Jo Orsler.

Liz Smeed added Referral and Notification numbers have been a concern for London – City of London has been in touch over their concerns.

JW- provision of specifics so that the team can investigate – work has already been undertaken with the City of London - Post Transition we can take a look again.

JW asks the group - Codes feedback, please pass on to Operations.

**Next meeting room 1 Aldersgate, this was booked for 18th Jan 2017 but this is going to change to the Tuesday 28<sup>th</sup> March 2017 in room 1.**

JW closed the meeting and thanked everyone for attending.

JW closed the meeting and thanked everyone for attending.

**Summary of Actions from today's meeting:**

| No | Action   | Owner        |
|----|--|--------------|
| 1  | <b>Action: Resource link to be distributed to the TSWG to be supplied by Mel McGinn - completed</b>      | <b>MM/AD</b> |
| 2  | <b>Action: Possibility to arrange a member of the content team to attend the next group meeting.</b>     | <b>JW</b>    |
| 3  | <b>Action: To share the Excel document of the protocols analysis with the group</b>                      | <b>JW</b>    |
| 4  | <b>Action: Circulate service development suggestions for the group to consider ahead of next meeting</b> | <b>JW</b>    |