

Partner Readiness Pack

Citizens Advice consumer service

April 2017



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1. Introduction

This partner readiness pack is designed to provide you - our partners - with more information on the transition of the consumer service, and highlight any key areas of change that will directly impact you.

About the consumer service transition

Since 2012, the Citizens Advice consumer service has been delivered in England and Wales* by a third party commercial contact centre provider through 3 delivery centres. Their main contract with us ended on 31 March 2017, though they will continue to deliver some element of the service until July, to ensure a smooth transition to our new providers. From April 2017 the majority of the consumer service will be delivered through 7 new delivery centres, all within the Citizens Advice network.

The first of these centres went live in January and the last goes live in May.

We believe there are numerous benefits from bringing the consumer service into the Citizens Advice network, including:

- increased potential for greater regional engagement with Trading Standards and other stakeholders
- increased opportunities to examine referral routes within the Citizens Advice network to offer clients support on consumer cases or in other areas where appropriate

Further information on the project, including all of the updates we've provided so far, can be found on our [partner pages](#).

*Please note - the consumer service in Scotland (which is delivered on behalf of Citizens Advice Scotland by Citizens Advice Direct) is not included in this project and as such remains unchanged. The 2 centres in Scotland will continue to handle their existing contact volume for the service and there will be no changes to their service delivery arrangements. We will continue to provide a seamless GB wide service during and after the transition has been completed.

2. The consumer service transition: latest update

To ensure a smooth transition, we have been providing training for new advisers since January 2017. Some of the 7 new delivery centres have been taking calls since the end of February whilst our current provider continues to deliver the service.



After 1 April 2017, we will be retaining the services of our current provider for a short period to offer added stability while the new delivery centres become established.

Throughout the transition our aim is to preserve the existing delivery model, including retaining high levels of quality and satisfaction for partners and clients, and using existing business processes where they work well. We have committed to our funder - the Department for Business, Energy and Industrial Strategy (BEIS), our delivery partner Citizens Advice Scotland, and to you - our partners - that our service levels will be maintained and there will be no perceptible changes.

The table below illustrates how we are shaping the service across the centres and the planned 'go live' dates (when they'll start taking calls).

Delivery centre	Advice areas	Go-live dates
Gateshead	General consumer, energy, post	General consumer - 13/02/17 Energy and post - 23/1/17
Manchester (with Sheffield)	General consumer, energy, post	General consumer - 20/02/17 Energy and post - 27/03/2017
Caerphilly	General consumer	20/03/2017
Cardiff and Vale*	General consumer	27/03/2017
Staffordshire North and	General consumer	03/04/2017

Stoke-on-Trent		
Torfaen	General consumer	15/05/2017
West Lindsey	General consumer	15/05/2017

* Cardiff and Vale will also be responsible for delivering all elements of the consumer service in the medium of Welsh

We decided to take a staggered approach for go live dates so that we can offer sufficient support to each delivery centre (as outlined in section 4).

This ensures that each centre is as prepared as they can be, understanding not only the manner in which the service is delivered, but also the processes that underpin this, the partner relationships we maintain, and how we interact with each other.

3. Changes you might notice

1) Centre codes

Each centre has been allocated an identity code to allow cases to be tracked back to their centre of origin. This is the case now and we know it's important to you. This allows us to share your feedback with the right centres, monitor quality and complaints and track performance.

The codes for the new centres are as follows and should be referenced when providing case feedback to us centrally or when contacting a centre directly:

- ZG for Gateshead
- ZM for Manchester
- ZC for Caerphilly
- ZA for Cardiff
- ZS for Staffordshire North and Stoke-on-Trent
- ZT for Torfaen
- ZW for West Lindsey

Existing centre codes remain the same:

- AN for Cwmbran
- AW for Weston-Super-Mare
- AB for Barrow
- CG for Glasgow
- CS for Stornoway

The codes for Agilisys centres (Cwmbran, Weston-Super-Mare and Barrow) will remain in use until July, and from that point onward new cases will not be opened by our centres using these, as the transition will have been concluded.

Please use the new codes on your partner feedback forms where relevant when you send them to us at: operations@citizensadvice.org.uk

2) Reporting and statistics

As you will be aware, the partner dashboard has been replaced with project updates for the duration of transition of the service.

From April onwards, the dashboard will once again be circulated on a monthly basis to all our partners.

3) Anonymous cases

There are occasions where consumers choose to withhold their personal information when making contact with the service. Where this occurs we provide each centre with a unique way of recording this.

Each new delivery centre has been allocated their own anonymous code which you will see appear in cases as detailed in this table:

Centre	Anon Code
Gateshead	AnonGat
Manchester/Sheffield	AnonMan
Caerphilly	AnonCae
Cardiff	AnonCar
North Stafford/Stoke	AnonSta
Torfaen	AnonTor
West Lindsey	AnonWes

Anonymous cases from our Scottish delivery centres will continue to be recorded as AnonCAD.

4) Portal reports

You will be able to access partner portal reports as usual during transition. The data being recorded by the new centres will be added to the portal in the same way as existing cases are.

For the reports which include a Case Reference/Case Region/Adviser code, you may notice a new prefix - 'Z' - which applies to all the new centres as outlined above in the section on 'Centre codes'. The prefix denotes the centre that originally created the case.

5) Contact information

You can continue to contact our Operations team to offer feedback on cases, to check information or reports, or with general queries via telephone (0300 5000 0922) or via email (operations@citizensadvice.org.uk).

Sometimes, as outlined in our [feedback process](#), you may need to speak to a delivery centre directly. This will be in situations where it is necessary to obtain information from the centre to fulfil any commitment or work you wish to pursue on the case, or if we need to take any corrective action. If you do need to contact centres directly, these are their numbers:

Centre	Centre prefix	Telephone number
Gateshead	ZG	0191 4907786
Manchester/Sheffield	ZM	0161 6720520
Caerphilly	ZC	02920 855222

Cardiff	ZA	01446 502072 01446 704990
Staffordshire North and Stoke-on-Trent	ZS	01782 408790 01782 408793
Torfaen	ZT	01633 876121
West Lindsey	ZW	01427 810914
Existing provider	AB, AN, AW	020 3103 5226
Citizens Advice Direct (Scotland)	CG, CS	01851 708429

4. Our implementation support for delivery centres

We have conducted a number of activities with all of our new delivery centres to help prepare them for the transition.

General support

Examples of some of the general support we have offered includes:

- Regular Operations Working Group meetings taking place with the managers of each delivery centre to ensure they are working to timescale and that focus on the key functions necessary for delivery is being maintained.
- Working with each delivery centre's management team to support their learning and understanding of our key business processes. Adherence to these will be audited at each centre within 3 months of go-live.
- Members of the operations team conducting on-site workshops on quality management, complaints, referrals and reporting.
- Providing go-live support teams to be on-site at each centre on week 1, including implementation and operations resource.

Workstream support

We also have specialists overseeing each workstream within the transition. Below we have outlined in more detail our approach to each of these areas, to assure you that we have worked closely with centres on all facets of the service.

We are also undertaking a number of additional quality processes during transition to ensure we have a full understanding of each individual centre's output, support and development needs and are working closely with each of them to ensure they utilise this data fully.

Referrals:

On-site training has been provided for each delivery centre's management and quality team, outlining the importance of the quality of referrals and how to drive and monitor performance. Best practice materials from existing suppliers have been shared with the new delivery centres, and performance trackers have been devised for us to track centre performance.

Complaints:

On-site training has been provided for each delivery centre's management team on the consumer service complaints process and resolution of informal and formal complaints. Complaints champions have been nominated in each centre and a user group will be set up to analyse complaints and review trends.

Systems:

We have ensured that managers and advisers working in the new centres have been granted access to the right systems to support them in delivering the consumer service. This has included overseeing the installation and testing of the Flare case management system and a new telephony system to ensure they operate as expected.

Energy and post:

We have ensured that the new centres delivering energy and post advice are aware of the importance of this advice and it's context within the wider landscape. This has been delivered through training and presentations within the centres as well as visits from the Extra Help Unit (EHU) and Ombudsman Service: Energy. These visits have involved training and ensuring that processes are implemented as agreed. In addition, following go live, there has been a robust case checking process completed by both centres and the operations team to ensure consistent delivery of advice as per process.

Quality:

All delivery centres have been fully briefed on our current quality monitoring process and framework, and on-site training has been provided. We will continue to work with all centres to support their understanding, benchmark scoring and drive continuous improvement.

5. Our engagement with you

Engagement throughout transition

Since the transition project began we have kept you - our partners - up-to-date with our progress through:

- regular [updates](#) (which we continue to send)
- engagement workshops (which we held in November 2016)
- speaking to a number of you at the Trading Standards Conference last June
- Trading Standards and other working groups
- referral checks being undertaken by our team and liaison with partners on these where necessary

Your feedback on the content of these communications has been positive and we will be considering your suggestions on how to enhance the service once the new service has been established.

We also continue to engage with BEIS, Citizens Advice Scotland, the National Trading Standards Board and other forums to provide updates on our progress.

We have recently produced a [short film](#) about the transition which can be cascaded by you to key staff to provide them with a greater understanding of what we are doing and how it is being managed.

Engagement going forward

We will continue to engage with you through our existing channels (as outlined below) through transition and beyond.

- **CTSI Conference**
We regularly have a stand at the Chartered Trading Standards Institute conference and hope to interact with those of you who will be attending this event.
- **Working Groups**
The Citizens Advice consumer service holds 3 regular meetings with a number of partners where we discuss performance and other matters of mutual interest.

1) Trading Standards Working Group

- **Attendees:** This meeting is organised and chaired by the consumer service operations team, and brings together regional co-ordinators from each Trading Standards region, Scotland and Wales along with key personnel from within Citizens Advice and Citizens Advice Scotland. BEIS also attend.

- **Agenda items:** Standard agenda items include performance, consumer education and training. We also update on key projects or campaigns being undertaken either by attendees or Citizens Advice and have detailed discussions around issues or challenges facing the consumer landscape and their impact on respective services. We also invite relevant guest speakers from other organisations or within Citizens Advice to present to and work with the group.
- **Location and frequency:** Citizens Advice offices, on a quarterly basis.

2) Energy Liaison Group

- **Attendees:** This meeting is jointly held by us (the consumer service) and the Extra Help Unit (EHU) based within Citizens Advice Scotland (CAS). Invitations are extended to Ofgem, energy suppliers and other relevant organisations from the energy sector including Ombudsman Services:Energy. BEIS are also invited to attend.
- **Agenda items:** The agenda provides an opportunity for Citizens Advice more widely, and the consumer service in particular, to provide updates on performance and answer questions from suppliers about this, along with discussing topical issues facing the sector.
- **Location and frequency:** Meetings are held in London and Glasgow alternately, on a quarterly basis.

3) Postal Operator Liaison Group

- **Attendees:** This meeting is held by Citizens Advice. Postal operations are invited as well as Citizens Advice Scotland, Alternative Dispute Resolution schemes, BEIS, Ofcom and the Consumer Council for Northern Ireland.
- **Agenda items:** The meeting focuses on data from the consumer service postal enquiries and also discusses consumer service operations and postal policy work.
- **Location and frequency:** Meetings are held in London twice a year.

In addition to these 3 groups:

- Citizens Advice Scotland (CAS) meets the **Society of Chief Officers of Trading Standards in Scotland** (SCOTTS) quarterly to update on performance and discuss topical areas as required.
- There is a **consumer service liaison group** meeting between Citizens Advice Direct (who deliver the service in Scotland), CAS and operational Trading Standards staff in Scotland to ensure working relationships are maintained and client journeys are as streamlined as possible.

- **Data sharing**

Data and information collected by the service is used by our partners including:

- Trading Standards Services (TSS)
- Energy Suppliers
- Extra Help Unit (EHU)

- Regulated Postal Operators (Royal Mail)
- Alternative Dispute Resolution schemes (Energy Ombudsman, Motor codes)
- Regulators (such as the competition and Markets Authority, Ofcom and Ofgem)
- Other data users (such as the Insolvency Service)

A number of you have access to consumer service data, for intelligence or enforcement purposes. Access to this is provided through our partner portal, which is an online site with a suite of reports that allows data to be interrogated and downloaded. Issues accessing this data or questions around the reports are guided to the duty inbox (operations@citizensadvice.org.uk).

Energy and Post suppliers and the Citizens Advice Extra Help Unit receive reports from the service's case handling system regarding referral numbers as the data for these aspects of the service does not import into the partner portal.

- **Citizens Advice partner pages**

We have developed these [partner pages](#), following feedback from you, to make the consumer service information you need and want to access more wide-ranging and easily accessible.

The pages now host a significant level of information about how we operate the service (including reporting, client and partner satisfaction information and quality) along with other business process information.

We will also host all information regarding the transition of the service on these pages for reference purposes, to allow you to access this if needed once the implementation has been concluded.

- **Local engagement**

There is a level of local engagement activity that currently takes place, specifically in Scotland (through colleagues at CAS) and also in Wales, and at other regional meetings by request where we are able to facilitate this.

It is our intention to utilise the increased number of delivery centres in England and Wales to further support this engagement. We also want to seek alternative ways in which we might engage with you once the transition has concluded and we turn our attention towards service development.

6. How you can support the transition

Feedback

There are instances when you may wish to feedback to the consumer service regarding cases which have been received via a referral or a notification. Any feedback shared is recorded as a key indicator of performance and provides vital intelligence to measure and improve the quality and consistency of the service.

Guidance on how to provide feedback to the consumer service can be found on our partner pages under the [Business Processes section](#), as can the relevant forms.

The feedback process provides valuable information to our centres and in turn to our advisers so that they become more skilled at advising. The themes gathered from feedback are used to inform and drive improvement areas, and complement the significant amount of data we collect internally from our quality review processes.



We would actively encourage you to offer as much feedback as you are able to during these next few months.

TSS audit

As part of our partner satisfaction strategy, Trading Standards Services (TSS) oversee and conduct a yearly audit of the consumer service as another means of measuring case quality. We work in partnership to produce a report on the results.

All TSS are actively encouraged to participate in the audit which consists of reviewing and grading a sample of cases using a Red/Amber/Green status. Categorisation of cases and feedback is provided by partners on case quality as part of this process. The survey results inform our future quality and improvement initiatives.

It was agreed at the Trading Standards Working Group that the next audit should be scheduled for after the transition in quarter three of 2017 once the new centres have all gone live and been established. This approach was agreed as being beneficial to all parties, but will be invaluable for us in the development of our advisers and the service as a whole.



Please provide support to the audit when it happens (as per details above), resource permitting.

Visits to delivery centres

We understand that you may have an interest in visiting the new delivery centres to meet the teams and see them in operation once they are established. We would be pleased to host these visits and would actively encourage you to engage in this way.


It is likely that we will also hold some of our partner based working groups and other meetings in the delivery centres to facilitate this engagement in the future.

 If you would like to arrange a delivery centre visit please email operations@citizensadvice.org.uk and we will arrange it at a mutually convenient time.

Adviser visits to Trading Standards offices

In the past, advisers have had the opportunity to visit Trading Standards offices. These visits have proved mutually beneficial in building relationships with delivery centres and increasing adviser appreciation of the wider consumer landscape and the importance of the intelligence gathering work our partners do.

We would actively encourage any of you that are local to the new delivery centres to get in touch with us if you would be willing to host adviser visits and we can coordinate these centrally.

 If you would like to offer to host an adviser visit in the next few months please email operations@citizensadvice.org.uk and we will arrange it at a mutually convenient time.

7. An introduction to the 7 delivery centres

We wanted to take this opportunity to provide some more detail on each of the new delivery centres. They have provided a summary below:

Citizens Advice Gateshead

Citizens Advice Gateshead has been helping people in Gateshead to solve their problems since 1957. Our service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities.

With the addition of the consumer service we now employ 117 individuals and have supported 62 volunteers to become Citizens Advice advisers. Last year we provided advice and education across key areas such as benefits, debt, housing, and employment, to over 10,000 clients.

In early 2015 we successfully secured the contract to deliver the national Adviceline service and in April 2016 we added the Witness Service National Contact Centre to our Telephone Services team. These opportunities provided us with the confidence and experience to successfully apply for the consumer service delivery centre. With 64 staff members our Telephone Services team employs over half our current work force.

We are looking forward to developing strong working relationships with our partners and continuing to help clients stand up for their consumer rights.

Citizens Advice Manchester (in partnership with Citizens Advice Sheffield)

Citizens Advice Manchester has existed since 1939. We have a long history of responding to the needs of the times and working with our diverse local communities.

In recent years we have adopted a service delivery model that places telephone, email, web and digital access as the gateway to advice. We currently operate from 2 permanent locations and over 25 community access points across the city and deliver over 20 individual projects.

We have over 15 years experience in delivering local and national telephone advice lines. These services provide both initial advice and casework services tailored to client groups with specific needs and vulnerabilities.

We strongly believe that our partnership with Citizens Advice Sheffield and their similarly extensive experience will provide a first class consumer advice service for the public that will contribute to the continued development of the service.

Effective partnerships are a key element of both our approaches to service delivery. Between us we work with over 40 organisations and we are looking forward to working with our new consumer service partners.

Citizens Advice Caerphilly

Citizens Advice Caerphilly Blaenau Gwent employs over 110 staff and around 80 volunteers to deliver a range of services across South East Wales and nationally. Our face to face services operate from 3 main offices and over 30 outreach venues, helping around 11,000 people each year.

Our dedicated contact centre has been growing for the last 4 years and includes 6 seats for Adviceline Cymru, 14 seats for the national Adviceline service, 13 seats for the Witness Service, another 9 seats for the MAS funded Specialist Debt Advice Service. consumer service staff take an additional 21 seats.

Over the last 12 months we have dealt with around 250,000 telephone clients and expect that to rise to 375,000 in 2017/18.

We already have a fantastic relationship with our local Trading Standards Office and look forward to building relationships with new partners nationally.

Citizens Advice Cardiff and Vale

Citizens Advice Cardiff and Vale was created from the merger of separate local Citizens Advice in the Vale of Glamorgan in 2001 and then again (with Cardiff) in 2011. We currently employ 89 staff and have 46 volunteers. We have 2 main offices - in Cardiff and Barry - and deliver advice at 12 outreach locations. Last year we helped 27,253 clients with 52,590 different problems.

As well as delivering core advice services in the area we deliver 10 projects, some covering other local authority areas and one covering Wales. We have been delivering telephone advice via the Adviceline service since 2011. Our webchat projects deliver both generalist advice and specialist debt advice across England and Wales.

Our current priorities are to make our services more accessible so we are seeking to extend telephone and digital services and out of hours delivery.

We were keen to deliver the consumer service because it fits with our vision to enable more accessible, expert advice. It will also give us the opportunity to develop a close and rewarding working relationship with Trading Standards.

Citizens Advice Staffordshire North and Stoke-on-Trent

Citizens Advice Staffordshire North and Stoke-on-Trent was formed in 2013 when 3 of the 5 local Citizens Advice in north Staffordshire merged to form one organisation working across Stoke-on-Trent, Newcastle-under-Lyme and Biddulph.

With the addition of our new team of consumer advisers we will employ over 130 people and we have about 75 active volunteers in various stages of training. In 2015-16 we helped 19,000 unique individuals through our mainstream advice services and offered support to a further 55,000 victims of crime through the Staffordshire Victim Gateway.

Our current priorities are developing our financial inclusion offer, responding to welfare reform, consolidating our work with victims and witnesses of crime and establishing our consumer advice.

From 2002-2007 we were part of the Community Legal Service's Direct national telephone service, which delivered specialist advice and legal casework by phone, focusing on social security benefits, debt and employment issues. Then, from 2011-15, we were part of the RBS-funded Physical Contact Centre pilot and, from 2014-17, we and 2 partner local Citizens Advice delivered the Staffordshire Adviceline with funding from the county council. Since 2015 we have delivered (with the same 2 partners) the Staffordshire Victim Gateway, delivering outbound and inbound calls from our own virtual call centre.

We applied to deliver the consumer service in order to develop our telephone offer, skills and capacity and our role as a provider of national services alongside our local services.

Citizens Advice Torfaen

Citizens Advice Torfaen has been advising since the 1950's. Today it provides specialist benefits, debt, housing and employment advice funded by a variety of local and national authorities including the Welsh Government.

With advice centres in Cwmbran and Pontypool along with a variety of outreach locations up the valley as far as Blaenavon, we have a good reach amongst the 90,000 people living in our local communities. Our 24 staff and 50 volunteers help 5,000 people every year and a further 4,500 through our generalist and specialist webchat services that reach out across England and Wales.

Our local priorities are to maximize the incomes of local households and help them manage their money against a backdrop of decreasing incomes, rising costs and flat local employment.

Taking on the consumer service is an exciting step into the delivery of advice over the telephone. It will make us more sustainable and help us to develop better multi-channel services for people in our local communities.

Citizens Advice West Lindsey

Citizens Advice West Lindsey serves a large, rural, diverse district. Our service has existed for over 50 years and has changed and adapted to meet the needs of the changing community. Currently, we have 13 staff and 14 volunteers in a variety of roles.

In 2015-16, we supported 3,772 clients with 9,854 issues. Of these 27% received advice face to face and 60% by telephone. We are committed to providing a high quality local service and recognise that clients benefit from being able to obtain help in a variety of ways.

We are currently part of the Lincolnshire Adviceline group and are committed to increasing and improving the service that we offer via telephone. In December 2014 we were only answering 10% of calls, but by December 2016 we were answering 84%.

We applied to deliver the consumer service as this is a great fit with our current objectives to broaden channels and increase access to services. It builds on our excellent relationship with Trading Standards locally and we look forward to engaging with partners more broadly post transition.

8. Going forward

Once we have transitioned the service, we want it to evolve to better meet the needs of both our users and you - our partners.

We are keen to work with you on this and have already started engaging with you on this issue at the roadshows and working groups. We've been given some excellent suggestions and there will be more opportunities in the coming months for you to help us identify and prioritise our various options.

We will keep you informed through regular communication updates and also through our existing working groups as we define our approach more clearly and start work on service development.

Any queries regarding the consumer service or the transition should be directed to operations@citizensadvice.org.uk or via phone - 0300 5000 922.

Free, confidential advice. Whoever you are.

We help people overcome their problems and campaign on big issues when their voices need to be heard.

We value diversity, champion equality, and challenge discrimination and harassment.

We're here for everyone.

The Citizens Advice consumer service provides free, confidential and impartial advice on consumer issues in England, Wales and Scotland.

Citizens Advice

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Citizens Advice is an operating name of The National Association of Citizens Advice Bureaux.
Registered charity number 279057.

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The Scottish Association of Citizens Advice Bureaux - Citizens Advice Scotland.

Scottish charity number SCO16637.

