

Service Performance, Quality & Standards Update

March 2023



**Money &
Pensions
Service**

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Debt Advice Updates

Highlights

We completed the first round of customer facing assessment at the end of February 2023 which was our first month out of test and learn. We are delighted to report that overall, our funded grants and contracts achieved the KPI.

Despite a few early teething problems with submissions, we were able to report KPI and provide assessment outcome data with only a slight delay. Delivery partners are now receiving regular commentary which supports assessment outcomes, and we anticipate that this will assist in preparation for calibration and appeals.

MaPS is delighted with the outcome with the first month's outcomes and will continue to work with delivery partners to maintain as a minimum and seek to further improve on the current position.

Thank you to all delivery partners for your contribution.

Calibration Data and KPI Reporting

We have now undertaken the first cycle of KPI reporting to our delivery partners in February 2023.

We have established a process which enables us to report the finalised, cleansed data on the first working day subsequent to month end. Therefore, it will not be necessary to provide an updated KPI as suggested in February's update.

As a summary:

- Delivery partners will be emailed their cleansed Customer Facing Assessment Calibration report and a summary of their achieved KPI on the last working day of each month.
- Delivery partners are encouraged to submit cases in the first half of each submission week as this will allow more time for submission queries to be resolved and data to be reconciled.
- If delivery partners delay submitting their customer facing assessments and do not meet the SLA for submission weeks 1 and 2, there is likely to be delay with the IQAS assessments.

This will also cause a delay in the calibration and KPI reporting.

- If MaPS does not receive cases in line with the SLA, resulting in submission volumes not being met, those cases will move into the following month assessment round. This also means that the KPI may be calculated on low volumes. For this reason, we are encouraging delivery partners to submit ahead of the submission deadlines wherever possible.

Day 1 of the appeals process will commence on the first working day subsequent to month end.

“We are delighted to report that overall, our funded grants and contracts achieved the KPI.”

Appeals

MaPS is committed to working collaboratively with delivery partners to ensure we are collectively and accurately assessing against the MaPS Standards.

We have established a range of processes to ensure this happens and these processes will continue to be reviewed internally, following their application over the coming months, to ensure they are fit for purpose.

Clarification for Appeals

For clarity:

KPI Met by Delivery Partner

- 1) Appeals are available to any delivery partner **not** achieving the KPI in an assessment month.
- 2) If the overall KPI of 80% for the delivery partner has been met, **appeals are out of scope.**
- 3) If the KPI has been met and the delivery partner wants to understand more about the assessment outcomes, **calibration sessions will enable this to happen.** These sessions are for the purposes of ongoing improvement moving

forward but not addressing assessment outcomes retrospectively. These calibration sessions will be held quarterly.

- 4) If the KPI has been met, the delivery partner **will not** face any performance related challenge from MaPS (including the application of Service Credits).
- 5) If the KPI has been met, any standards assessed as 'not met with impact (with or without financial loss or harm)', will be reported on the MCR/MPR template for discussion at the scheduled review meeting. (Please also refer to the detriment process)

KPI Not Met by Delivery Partner

- 1) Delivery partners **not** achieving KPI in an assessment month are able to submit appeals in line with the eligibility criteria (including the temporary arrangement of appealing standards on **all** cases which will be reviewed at the end of April 2023).
- 2) Appeals will follow the appeals process and the SLA.
- 3) Any overturned appeals will alter the KPI accordingly and if the KPI is met, point 4 above will apply.

General for All Delivery Partners

Calibration sessions are open to all delivery partners to discuss and understand assessment decisions for the purposes of continuous improvement moving forward but not addressing assessment outcomes retrospectively.

- 1) Any standards 'not met with impact' will be the focus of discussions at MCRs/MPRs to ensure each affected customer ultimately receives high quality accurate advice, including seeking assurance that root cause is being addressed.
- 2) Any standards 'not met with no impact' will be referenced at MCRs/MPRs to determine what plans a delivery partner has in place to seek assurance that their systems address the root cause of the unmet standards.
- 3) Any other administrative errors made in assessment will be addressed outside of the appeals process.

Case Submission Eligibility

MaPS has developed a [Case Eligibility document](#) embedded below.

This provides further detail on the requirements for cases to be eligible for customer facing assessment. Please share this document accordingly and use to assist in selecting appropriate cases which can be assessed against **all** customer facing standards.

If you have any queries or need clarification on case eligibility, please address these to your respective MaPS Quality Manager.



Case Eligibility V1
14.03.23.docx

Queries

Please continue to send queries to the MaPS Quality email address: mapsquality@maps.org.uk or speak to your MaPS Quality Manager.

Thank you for your continued support.

The Service Performance, Quality and Standards Team

Money Guidance & Pension Guidance Updates

Where We Are So Far

Since the SPQS team was formed, we have been tasked with monitoring the service performance, quality, and standards of all our service lines funded by MaPS. Focus was initially on debt delivery partners and good progress has been made with completion of a test and learn phase with an Independent Quality Assessment Service independently checking their Standards Assessments.

SPQS have worked collaboratively across all service lines to develop guidance to support assessors with their understanding of the standards. This has been shared with Money Guidance, Pension Guidance and Pension Wise. So far, we have received good feedback from all. Work will continue on the guidance and future updates will include feedback from all parties.

Money Guidance assessors have been submitting cases that have been checked in accordance with the standards and these are being assessed internally by SMEs within the SPQS team. The good news is, the Money Guidance assessors are consistently scoring to a high standard, providing ongoing assurance of compliance with the Standards.

Over the next few months, Money Guidance will be onboarded and working closely with the new Independent Quality Assessment Service. We will be working closely and supporting the teams with this transition.

Our internal Pensions teams have commenced submitting cases. We have received positive feedback, and this has been incredibly helpful. We have also had good discussions regarding the standards and the guidance, this feedback will be considered in the next iteration of the guidance.

Members of the SPQS team recently held an engagement session with our external Pension Wise providers which was really positive. Over the next few months, we will be agreeing a plan and we are looking forward to working closely with our providers in the future.

Calibration and Feedback

Firstly, we would like to thank both the Money Guidance and Pension Guidance teams for your continued feedback on the standards and the guidance documents. This has helped us to develop and tailor the resources to support the services that MaPS delivers.

Through our calibration sessions, we explained that, as these standards are across the whole of MaPS, that one set of guidance has been issued to keep this as streamlined as possible. We are happy that this is understood and that certain words, for example 'practitioner', is the same as agent/specialist.

We are pleased to see that there is a general understanding of what is required on a customer interaction for a standard to be met. There is still some ongoing work to determine what would constitute as 'not met no impact' and 'not met with impact'. Through further calibration, we are hoping that this will become clearer after assessing several different interactions.

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