

Service Performance, Quality & Standards Monthly Update

August 2023



**Money &
Pensions
Service**

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Monthly Overview

August 2023 Update Summary

As a brief overview, here is what you will find in our June SPQS update:

Advice Services

- An update on the [Advice Assessor Toolkit](#) which is being developed to support debt advice assessments.
- Updates made to the [Appeals Submission Form](#), including:
 1. Introducing an impacted standards section, and
 2. Details on the appeals email address.
- We will be sharing the outcome from [calibration discussions](#) with delivery partners.
- Thanks to those who have completed the [Debt Advice Quality Framework survey](#) which is now closed.
- An update on the [customer satisfaction and customer outcome reports](#).
- [Market testing](#) on the future of the Mental Health Crisis Breathing Space provision.
- The latest updates made to our [Quality Website](#).

Guidance Services

- An update on the [customer satisfaction and customer outcome reports](#).
- Our Independent Quality Assessment Service (IQAS) is [currently recruiting](#) for assessors who have technical pensions experience.
- Nick and Lucy in our SPQS team are looking forward to [visiting Citizens Advice Scotland and HGS](#) this month.

Previous Updates

If you have missed any of our previous updates, you can find them here on our quality website:

[MaPS SPQS Quality Website - Latest Quality Updates](#)

Queries & Feedback

Please continue to send queries and feedback 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

Debt Advice Updates

Advice Assessor Toolkit

The [Advice Assessor Toolkit](#) is being developed to support the assessment of debt advice. It will underpin the MaPS Customer Facing Standards Guidance which applies across all MaPS service lines but is intended to provide much more context for the assessment of compliance against the MaPS Standards within the debt customer journey.

The Advice Assessor Toolkit has been fully drafted and is currently undergoing its first internal review before testing. MaPS is looking at testing options this week and will reach out to delivery partners to identify providers willing and able to test the toolkit.

Testing will be conducted with delivery partners and IQAS concurrently and feedback from testing will be used to amend the toolkit prior to it being released as a first version.

The toolkit will be the reference point moving forward for managing the outcomes of calibration sessions and appeals and will be updated alongside any other changes associated with the MaPS Standards.

Appeals Submissions

The [Appeals Submission Form](#) has been updated to capture necessary information moving forward. The changes are recorded on the front of the form, however, there are two key changes that warrant some additional context.

1. Impacted Standards Section

There is a section added to the form to enable delivery partners to include any standards, which have been impacted by the main standard being appealed, because they relate to the same issue.

In the event that an IQAS assessment judgement is overturned as a result of appeal, there may be impacted standards that would otherwise have been met if it were not for the issue being challenged during appeal. Delivery partners should consider this when submitting an appeal and include those standards within the new section of the appeals submission form.

MaPS requests that delivery partners do not include impacted standards where they would not be met for another reason aside from the issue being appealed.

The importance of considering impacted standards at the time of submitting the initial appeal, is that the appeal will focus only on those standards highlighted on the submission. Impacted standards will not be considered retrospectively as this will require a further review of the case which will be outside of the SLA timelines.

2. Appeals Email Address

The internal management of the appeals process will be done via the MaPS appeals email address appeals@maps.org.uk. The appeals email address must be used for all appeal handling from delivery partners and IQAS. This will ensure that regardless of the availability of the respective MaPS Quality Manager, appeals will be progressed by a member of the MaPS SPQS delivery team.

In addition to the above changes, there is also a point for clarification relating to appeals submissions. It is important that appeals submitted, are done with the intention of changing an unmet standard to a met standard.

This means that if a standard is unmet for a number of reasons, but only one reason is presented for appeal, the standard cannot be changed to met as a consequence, even where the reason for the appeal would otherwise overturn the original assessment outcome.

To mitigate instances of this, it is important to consider the following:

Scenario 1

- If the appeal is challenging all of the reasons the standard has been determined as not met, the submission must be clear about all reason, and the evidence location in the case to support each reason must be clearly referenced.

Scenario 2

- If the appeal is only identifying one reason for the standard being not met and there are other reasons, for example:
 - There is a missed option identified along with an incorrect option and the appeal is against the missed option, but there is agreement that an incorrect option is evident, this would make the appeal ineligible.

The appeal is ineligible as it would not be possible in this scenario, to change the standard to a met standard.

Where there are instances of this nature and delivery partners would like to progress a discussion around this, calibration sessions would be the appropriate place to seek clarity.

Calibration & Internal Calibration

MaPS has refined the process of Internal Calibration to ensure that queries raised by all parties in relation to compliance with the MaPS Standards are captured and addressed.

MaPS intends to share the outcome of internal calibration with delivery partners by the end of the month subsequent to the final calibration session within the quarter.

By sharing the outcome of all calibration queries, across all delivery partners, they will be able to share with advisers and assessors MaPS expectations. This aims to aid greater understanding and consistency, between delivery partners, MaPS and IQAS.

Debt Advice Quality Framework

As you will be aware from a previous SPQS update, MaPS had recently circulated a survey to gather input into how debt advice organisations and other relevant stakeholders use the Debt Advice Quality Framework.

The survey is now closed – thank you to everyone who responded, this has provided us with valuable insight. We will use what we have learnt in the forthcoming months to inform our thinking, considering how our various frameworks for quality and standards complement each other.

Customer Satisfaction & Customer Outcome Reports

Delivery partners will be receiving ‘Voice of Customer’ Reports Q1 2023/24 by the end of August. The reports are for feedback received from customers during the period April to June 2023 and refer to Customer Satisfaction results only.

Quality and Contract Managers will be discussing the contents of these during Q2 review meetings. Future reports will include insights and information for both customer satisfaction and customer outcomes. We will be sharing a schedule for these reports in early September.

Mental Health Crisis Breathing Space Market Engagement

MaPS will be engaging in market testing on the future of the Mental Health Crisis Breathing Space service provision starting on 30th August where we will cover our high-level Quality Assurance approach.

If you would like to register an interest in this opportunity, please contact commercial@maps.org.uk in the first instance.

Quality Website Update

As mentioned in our previous updates, the content on the Good Practice Toolkit has been removed from our quality website.

Please be aware that it may be out of date and no longer fit for purpose if you have kept a copy and choose to use it. You can still access the SFS details here: <https://sfs.moneyadviceservice.org.uk/en/>

Queries & Feedback

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Thank you for your continued support.

The Service Performance, Quality and Standards Team

Money Guidance & Pension Guidance Updates

Customer Satisfaction and Customer Outcome Reports

Money Guidance and Pensions Guidance

The [Quarterly Reports Q1 2023/2024](#) have been shared and present the key customer feedback KPI's for customers who have been in contact with MoneyHelper from March to May 2023 (and who have been interviewed March to June 2023).

These reports provide results for Customer Satisfaction and Customer Outcomes. Quality and Contract Managers will be discussing the results at future review meetings.

Pension Wise

The [Customer Outcomes Report Q4 2022/2023](#) which represents customers who had an interaction with Pension Wise in January 2023 and were interviewed in May/June 2023. The outcomes survey highlights different groups of people who were included in the evaluation.

The [Customer Satisfaction Report Q1 2023/2024](#) has also been shared and demonstrates customers who had an interaction with Pension Wise from February to April 2023.

Pension Recruitment

Our supplier for the Independent Quality Assessment Service (IQAS) are continuing to recruit assessors to independently assess compliance of the MaPS Standards. They are especially keen to recruit assessors with technical pensions experience.

You can access details about these roles on the Recognising Excellence website:
<https://www.recognisingexcellence.co.uk/recruitment/>

Citizens Advice Scotland & HGS Visits

Nick Parkes (MaPS Lead Quality Manager) and Lucy Ludgate (MaPS Quality Manager) are looking forward to visiting our delivery partners in Scotland this month!

Visits are planned to meet the Citizens Advice team in Edinburgh who manage the Pension Wise grant, and our HGS colleagues who manage the delivery of Money Guidance for our customers.

The purpose of the visits will be to discuss the ongoing implementation of the MaPS Standards across our services, including the implementation of completing assessments, how calibration is progressing and discuss any other feedback regarding the MaPS Standards.

For our Pension Wise colleagues, this is the first time members of the MaPS SPQS team will have met, so it will be a good opportunity to meet face to face and expand our relationship.

Both Nick and Lucy look forward to spending more time with our guidance delivery partners and discussing the standards assessments with them.

Many thanks,

The Service Performance, Quality and Standards Team

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