

Service Performance, Quality & Standards Monthly Update

August 2024



**Money &
Pensions
Service**

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Monthly Overview

August 2024 Update Summary

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

Advice Services

- Reference to [Cost of Living payments](#) under standard 2a-iii has now been removed from version 2.2 of the [Advice Assessor Toolkit](#).
- A reminder that [Calibration Sessions](#) are optional.
- Please ensure all appeals are submitted using the current version (1.6) of the [Appeals Submission Template](#).
- [MaPS](#) are in the process of developing a [Knowledge Hub](#) as part of the feedback received from the [Quality Engagement Session](#). Please continue to use the [Feedback Spreadsheet](#) to identify whether the topic/standard for which you have a query, has been raised and responded to previously.

Guidance Services

- We are pleased to announce the release of the [Guidance Assessor Toolkit](#). We welcome your feedback on your experience using the toolkit.

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

Cost of Living Payments

After the three months since the cessation of Cost of Living payments, [MaPS](#) reviewed the guidance and instructed that from July 2024 independent assessment should assess 2a-iii in the context of the following guidance.

The reference to Cost of Living Payments currently in the toolkit under 2a-iii will be removed as Cost of Living Payments are no longer being issued and therefore do not need to be explored. Reference will be added to the toolkit under 2b-iii to the requirement to include the Cost of Living Payments on an SFS where a DRO is a chosen debt solution and there is evidence that the payment has been received within the previous month.

Reference to Cost of Living payments under standard 2a-iii has now been removed from version 2.2 of the [Advice Assessor Toolkit](#) and therefore the guidance above will continue to be applied. This is the only amendment in the [Advice Assessor Toolkit](#) for this standard which has been applied prior to the 1st September 2024 when any further changes will be applied.

Optional Calibration Sessions

Following on from our previous update on the scheduled [Calibration Sessions](#), this is a reminder that these sessions are [optional](#). Delivery partners can consider whether there is anything to be tabled at the quarterly calibration meetings, and if not, notify their respective QM who will cancel them for that period.

Where there are items for discussion, please ensure that these do not, or have not, formed the basis of appeals, and that they have not formed part of the responses provided via the Feedback Management Process.

Please let your MaPS Quality Manager know if you have any queries in relation to this.

Appeals

Since June 2024, delivery partners should have been using Version 1.6 of the [Appeals Submission Template](#). We are still receiving some appeals on older versions of the template. Can you ensure that appeals are submitted on version 1.6, that no editing of the template has taken place (all sections must be evident), and that all the relevant sections are completed fully and accurately.

Where we receive appeals using the incorrect or edited template, or where the information recorded is identified at the outset as inaccurate, this could result in appeals being ineligible.

We have had examples of appeals for standards which were initially independently assessed at 'Met' but inaccurately recorded in the appeal as 'Not Met'. This has only emerged on production of the updated Calibration Report, after the independent appeals manager has reassessed the case and overturned the appeal.

Please also ensure that the evidence which supports why the standard should be assessed as met, is clearly presented within the relevant section of the appeals template.

Regarding appeals submitted for July and August 2024, it is important to note that the standards will have been assessed, moderated and will be reviewed by the Independent Appeals Manager, using version 1.1 of the [Advice Assessor Toolkit](#). Therefore, although we know the changes in approach are coming, they will not be implemented until 1st September 2024. Even in instances where an appeal may be upheld, if it were based on the guidance within version 1.2 of the AAT, only the guidance in version 1.1 of the AAT will be considered for July and August appeals.

MaPS Feedback Management Process

MaPS still very much welcomes the submission of queries using the [Feedback Spreadsheets](#) which were initially developed to support the launch of the Advice Assessor Toolkit in September 2023. The information in the spreadsheets is ever evolving and we are keen to ensure that we do not remove any historical queries and responses as they may still have a value.

Our intention is to eventually house all historical queries and responses on our evolving [Knowledge Hub](#), which we began to develop following the feedback from the [Quality Engagement Session](#), at the end of May 2024. In the meantime, we would encourage delivery partners to check the full version of the Feedback Spreadsheet circulated to all delivery partners, by using filters to identify whether the topic/standard for which they have a query, has been raised and responded to previously. This will assist with keeping the spreadsheet of responses to a reasonable size and will eliminate as much duplication as possible.

Quality Engagement Session Update

As you are aware, the focus of the Quality Engagement Session in May 2024, was in the main to celebrate the success achieved by delivery partners over the first year of implementing and embedding the [MaPS Standards](#), as well as determining what improvements could be made to increase compliance against the three lowest performing standards.

We have confirmed our first steps to attempting to address the compliance challenges for those standards by releasing revised guidance which sets out some boundaries for assessment. This revised guidance will be tested over a 3-month period from September to December 2024. During the testing period we will be scrutinising the appeals and feedback and making further iterative changes to the guidance as required.

At the end of the 3-month testing we aim to be able to confirm whether the revised guidance is viable for assessment and decide on the appropriate guidance as we move out of testing.

This is a work in progress, and we have no preconceived ideas about how effective this will be for assessment in the longer term, which makes the testing even more valuable.

We greatly appreciate the contribution and co-operation of all parties involved in the continuous improvement of these processes.

In addition to testing the revised guidance, we continue to work on the development of a knowledge Hub which should also support the guidance by providing, for example, specific case scenarios with clarity on how [MaPS](#) expects the standards to apply to those scenarios.

We will keep you updated on the progress with this piece of work during its development.

Many thanks,

The Service Performance, Quality and Standards Team

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

Money Guidance & Pension Guidance Updates

Guidance Assessor Toolkit

We are pleased to announce the release of the [Guidance Assessor Toolkit](#). This will be circulated to delivery partners at the beginning of [September](#).

This toolkit will be used alongside the guidance document in the assessment of the [MaPS Standards](#). It will be used and referenced by both IQAS and delivery partners. The toolkit provides further clarity on the application of standards during assessment.

It has been organised into customer journey order and each standard has been colour coded to display its place in the journey. We have highlighted where specific delivery lines (Money Guidance, Pension Guidance and Pension Wise) have either specific standards or require specific considerations to assess the standard.

The [Guidance Assessor Toolkit](#) is expected to go through a number of iterations as we gather feedback and apply it to live assessments. We expect to add or clarify areas as the document is integrated into the assessment process.

It has been developed using feedback from calibration from both the IQAS, delivery partners and the conversations we have had over the last year with all partners and internal colleagues.

We welcome and encourage your feedback on your experiences using the toolkit and any clarifications or additions will be considered for inclusion in future versions. We encourage this to be shared with us by close of business [13th September 2024](#).

If required, we can hold clarification and teach-in sessions for individual delivery partners. In the meantime, please share any questions with your [Quality Manager](#).

Many thanks,

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