



ROYAL MAIL & CWU NATIONAL TERMS OF REFERENCE **SAFE & CONNECTED TRIAL**

Introduction

Royal Mail and the CWU's 2018 National Guiding Principles Agreement provides the joint commitments necessary to find mutual interest solutions along with the shared goal of finding opportunities to replace current traditional letter mail volume decline with other alternative, innovative and appropriate workload, as well as maintaining and enhancing employment security for Royal Mail's employees. This trial is fully consistent with these commitments and principles. As the UK's National Universal Service provider, Royal Mail has an unparalleled opportunity to extend and enhance the unique role that its postmen and women currently hold within British society along with enhancing Royal Mail's valued and trusted reputation within its communities.

Background

The UK, like most developed nations, has increasing numbers of older citizens. Many of whom live alone and/or away from their children/families. Postmen and women making doorstep calls to ask some simple questions to determine the well-being of these older members of society has been either successfully trialled or introduced in other counties such as Jersey (Jersey Post) and France (La Poste).

Royal Mail has been asked by the Home Office to support trialling a similar type of service in the UK, titled 'Safe and Connected'. The trial involves Royal Mail working with three Local Authorities as well as the Voluntary, Commercial and Information Technology sectors, to provide a possible preventative solution to this group of people and so reduce or delay access to reactive support or dependence – e.g. Statutory Social Care Services.

Trial Description

The Safe and Connected trial is aimed at determining if early intervention by the voluntary sector or local authorities positively impacts on feelings of loneliness, well-being and safety, which in turn contributes to a reduction in the use of statutory services.

This will be done by calling at the doorstep of a pre-recruited group of people and asking them 5 pre-agreed questions related to their happiness and wellbeing. This group will be recruited and vetted for their suitability and their consent gained by the local authority via partner organisations, e.g. Community Groups. The participants will not be currently under the care of Statutory Social Services or be known to them and the vetting procedure will ensure that the participants are physically and emotionally suitable to take part in the trial (for example sufficiently mobile to answer the door).

The trial, which is expected to last for 6 months, is based on the logic that the answers to these questions during the trial will provide early indications for intervention. All interventions will be authorised by the Local Authority and carried out by the Local Authority or their chosen Voluntary Service Provider.

The Principle partners in the trial are:

- The Home Office Safeguarding Unit (who are funding elements of the trial)
- 3 x Local Authorities
 - Kingston Council (Royal Borough of Kingston Upon Thames)
 - North Yorkshire County Council
 - Liverpool City Council

- Call and Check Ltd. (Company with expertise in participant recruitment and selection against suitability criteria)
- NexJ Systems Inc., (Technology Provider)
- Local Voluntary Service Providers (a lead partner in each area – e.g. Staywell in Kingston)

The trial will commence on 17th September 2018. The trial will be subject to ongoing review at a National Level during the trial period. Any extension beyond the 6 months will be agreed Nationally by Royal Mail and the CWU.

The trial service will comprise a maximum of 100 participants per unit who will each receive two visits a week (so a maximum of 200 calls in each unit each week).

Visits will be undertaken by postmen and women in the following Delivery Offices:

- New Malden DO - KT3 (Borough of Kingston Upon Thames)
- Whitby DO – YO21,22 (North Yorkshire County Council)
- North Liverpool DO – L4,5 (Liverpool City Council)-

Royal Mail's singular role within the trial is to collect responses to 5 pre-agreed questions on the doorstep. This will consist of a prescheduled call to a pre-recruited and qualified participant on a scheduled day. Visits will be undertaken twice a week per participant. Each question is linked to national public sector measures in the areas of loneliness, safety and well-being. (See Annex B for details.)

Answers to these questions will be captured via a web-based application accessed via a Royal Mail PDA by the OPG making the call and sent directly to the Local Authority. The Local Authority will monitor and authorise an appropriate follow-up action with their local Voluntary Service Provider when needed.

The process by which doorstep calls will come into and be scheduled by the Delivery Office is outlined in the Process Chart set out in Annex A.

Below are some of the main considerations and jointly agreed parameters that are being operated to within this trial:

- Safety
 - Calls will only be made on a scheduled day to participants previously signed up and pre-qualified by the Local Authority, therefore the participant has given their full consent and is of able body and mind to receive the call.
 - Recruited participants will not be vulnerable people or those that could pose concerns/threats to OPGs.
 - There will be no 'crossing of the threshold' required by OPGs. All questions should be asked by the OPG on the doorstep and answers captured and recorded there.
 - Photo ID must be shown to the participants by the OPG making the doorstep calls.
 - OPGs will be trained and supported to carry out the task but this will **not involve** any medical and or mental health training, medical, health or mental health responsibility as these are **not part of the trial**. Royal Mail's role is to solely collect information on the doorstep and pass this onto the appropriate Local Authority.
 - OPGs will be able to capture, via the Safe and Connected application, when a participant is not at home; if there is no response at the address when they call on the scheduled day; or if there is an answer at the doorstep but by a person whom is not the participant. The Safe and Connected application provides the ability to record any of these outcomes if they occur. This will show that Royal Mail have called and fulfilled the requirement.
 - In the event of an emergency, the OPG would only be expected to act as 'a good citizen' and make best efforts to call the necessary emergency services or flag concerns with their line manager – as per current practices.

- Quality
 - The need to demonstrate the ability of Royal Mail to schedule and deliver this service to the required very high quality standards.
 - The need to understand any implication for Attendance Calls, and not to impact on products and services currently delivered by Royal Mail within the trial sites for the duration of the trial or affect Quality of Service.

- Performance
 - Measuring and understanding the average time taken to undertake calls and the impact on overall workload. This will be jointly assessed and also take into account device activity time information, IE (Industrial Engineers) measurement, study work and feedback from postmen and women who are making the calls during the trial. Note: 10 mins per doorstep call will be scheduled for trial. Any change will be subject to review and agreement by the national parties.
 - Current National Agreements will be applied and frontline staff will not be expected to work past their scheduled finishing time during the trial. In cases where Safe and Connected cannot or is not performed, alternative actions will apply whenever calls are not completed.
 - Designing, developing and integrating the processes necessary to properly schedule and cover the calls.
 - Carrying out doorstep calls and capturing responses to the 5 questions successfully to the question transcript shown in Annex B.
 - Jointly designing, developing and refining the training required through the trial experience, which will be agreed with CWU and delivered primarily by WPC, recognising the timeframes for take on are set by the local authority and the need to provide additional support to the WPCs.
 - Unit Managers to successfully and reliably schedule and deliver this service.

- People
 - Feedback from frontline OPGs on all elements and aspects of the Safe and Connected trial will be captured at regular intervals and shared with the Joint Working Group. Relevant information will contribute to be independent evaluation which is being managed and funded by the Home Office. Where evaluation is sought from outside companies on behalf of the Home Office which involves OPGs we will establish the appropriate process in advance in consultation with the CWU. It is recognised that this type of work is different from traditional postal work, and the task has tried to be designed in a way so that everyone can ask the questions and record the answers without specialist skills or knowledge. Some OPGs may be more confident to carry out this work than others, so support and training will be provided, including 'one-to-one on the doorstep training' where required or requested by the OPG, whilst learning is developed, this can then be shared with others as more experience is gathered.
 - All delivery staff in a unit (or part of a unit included in the trial) will be trained in order that they can carry out the doorstep calls when scheduled, however regular weekly reviews and refresher training will take place in order to ensure any concerns are being dealt with and the necessary support is provided to any individuals who may require this.
 - It is intended that frontline staff, performing the delivery route, should be the ones who perform the task and carry out the call on the doorstep as this helps to bring confidence and recognition to the process, capitalising on the trusted position in the communities that Royal Mail serves, whilst also providing continuity, consistency and confidence for the participant. However, and in some exceptional cases performing the service on the regular delivery may not always be the right option and where this occurs it will be reviewed jointly by the DOM and CWU Rep with the relevant feedback being made to the Joint Working Groups as part of the trial evaluation process.
 - Both parties endeavour to maintain the principle of a consistent and regular postman or woman on each doorstep call during the trial. However this cannot always be guaranteed so alternative options will be explored and understood during the trial, to

cover unplanned days off, too many calls on one route, as well as planned absences such as annual leave. These options will be fully consistent with current National Agreements.

- In terms of resourcing to workload, the additional workload should initially reflect the 10 minute time value. Any changes will be agreed nationally by both the CWU and Royal Mail. Practical planning will be carried out by the local Delivery Office Manager/CWU Rep in advance of the trial commencing and also as the number of participants increases in order to ensure the plan is in place and then review this plan as part of their Weekly Resourcing Meetings. During the trial options can be considered to support the additional workload, including options around outdoor deliveries being able to commence earlier (subject to any shared van arrangements) and ensuring fair and manageable workload through any changes to park and loops arrangements. If additional time is needed and the OPG agrees to work beyond their scheduled finish this will be paid in line with standard arrangements.
 - It is recognised that some of the trial participants may value the contact of their Royal Mail OPG so much that they delay them in conversation potentially causing them to overrun on their delivery and impacting their ability to complete their other scheduled workload. The 10 minutes time scheduled is intended to offer sufficient time to complete the questions (expected to be around 5 mins on average) and some contingency if customers take longer to come to the door, or wish to engage in conversation. Delivery OPGs will be supported and trained in order to deal with this situation in a tactful and respectful manner whilst also recognising the value of this contact; however this will be monitored and logged in the trial sites and any operational issues dealt with through Weekly Resourcing Meetings in line with National agreements.
 - For the first 2 weeks of introduction in each unit a Workplace Coach will conduct Safe and Connected calls so that they can develop experience, tips and advice for the regular duty holders. This aims to assist the WPC with the ongoing-training to other colleagues during the trial. A relevant training brief has been established for the trial and will be reviewed ongoing during the trial period by the Joint Working Group.
 - The trial will start with a small number of participants and OPGs, and build from there to 50 - 100 participants per office. This will allow transfer of knowledge to colleagues during the trial expansion.
 - Performing a visit during core deliveries is the approach both parties want to implement during the trial as it recognised that this takes advantage of the delivery person already being near the address every day and them being a familiar face. This also enhances and maintains the efficiency of the USO (Universal Service Obligation). However, this aspect will be closely and jointly monitored during the trial with regular reviews including the Weekly Resource Meetings to ensure all products are being delivered to specification and the above is workable; where any individuals have issues they should raise these and support will be provided. This will also be a key feature of the feedback process to the Joint Working Group. If there are instances where after additional support has been provided there remain issues, then these should be reviewed by both parties nationally.
- Participants – including but not limited to:
 - Understand the value put on the service by the receiving participants and relevant Authority who is funding this activity.
 - Understanding the experience of the receiving participants.
 - Length of time on the doorstep – right amount of time?
 - Delivery of questions by OPG's.
 - Content of the questions.

Involvement

Local managers and CWU IR and H&S representative(s) will be fully involved in all aspects of the trial from the outset and throughout, including the review stages. Release will be provided during the trial for the local CWU representatives in order to ensure full meaningful involvement within the

trial and to adequately deal with any workload issues and to assist in the necessary training and support, also to provide regular reports and feedback to the joint working group and for any to deal with any other issues which may surface during the trial.

Joint involvement will enable the development of mutual understanding of the issues, the potential impact on individuals and the operation and any possible resolutions. It will also enable both parties to identify any issues requiring clarification or further investigation. As part of this there will be the creation of a Joint Working Group which will involve the CWU Local, Area and Divisional IR and H&S Reps, and a CWU National Lead.

Any operational changes proposed during the trial will be progressed fully in line with the IR Framework and will be consistent with existing National Agreements.

Health & Safety is of paramount importance to both Royal Mail and the CWU. All relevant safety compliance documentation will be fully developed and agreed jointly between RM and the CWU National Health & Safety Department. These systems and ways of working will be reviewed and updated as necessary during the trial.

Training

Work Place Coaches (WPC) will receive the correct and appropriate training in order to carry out this new task, which they will then deliver to all staff at the participating sites who will also receive full training. The main training can take place in groups indoors, but WPCs will also provide particular support to any OPG who is anxious or uncertain of the Safe and Connected doorstep task, and as set out above can provide 'one-to-one on the doorstep training' where required or request by the OPG. The timescale to deploy the full number of participants, and provide early support may mean that Work Place Coach capacity and availability needs to be supplemented with additional resource in order to complete in time. Project Team members will provide an additional level of support. The exact training requirements for the trial will be developed and agreed with full CWU involvement.

Any additional training needs to be reviewed jointly by the Joint Working Group and form part of the overall evaluation process.

Measures of success

The aim of this trial is to understand if Royal Mail can deliver a service such as this which can be delivered and carried out in a way that meets the needs of the Business, Customer [Local Authorities/Care providers] and Consumers [Receiving participants] profitably and the level of investment needed to realise this nationally.

The trial will also measure the effectiveness and value of the visits for the business and receiving participants as well as the Local Authorities, the Home Office and Voluntary Sector Providers.

The trial will enable front line staff to raise any issues and seek support and capture any issues and advice that would need to be factored into any wider roll out. Accordingly feedback will be taken from those OPGs carrying out the doorstep activity throughout the duration of the trial and this will be considered and discussed by the Joint Working Group in line with the agreed process for capturing views and feedback.

Additionally the trial will scope and evaluate the impact of outdoor workload and any impact the service has had during the 6 month duration in order to scope core operational workloads and responsibilities and whether a "Safe & Connected" service is a potential growth opportunity for Royal Mail for the future.

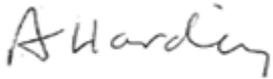
Review

Throughout the trial period and in order to resolve any issues, regular reviews will be held by the Joint Working Group regarding the scheduling of this work task, any workload or operational impact of Safe and Connected and the views and feedback from OPGs within the trial sites.

Additionally, regular updates will take place nationally involving the CWU Assistant Secretary at the weekly catch up meetings with the National Delivery Director, the Joint Working Group, along with the involved Local and Central Government groups and Voluntary Service Providers.

Should the trial be considered a success and worthy of extending by the principle partners, either beyond the existing trial sites to a wider deployment or National roll-out, this will be subject to further joint discussion and Joint agreement at a National level.

Any questions of interpretation, implementation or application of these Terms of Reference shall be referred to the respective Headquarters for resolution.



Signed.....

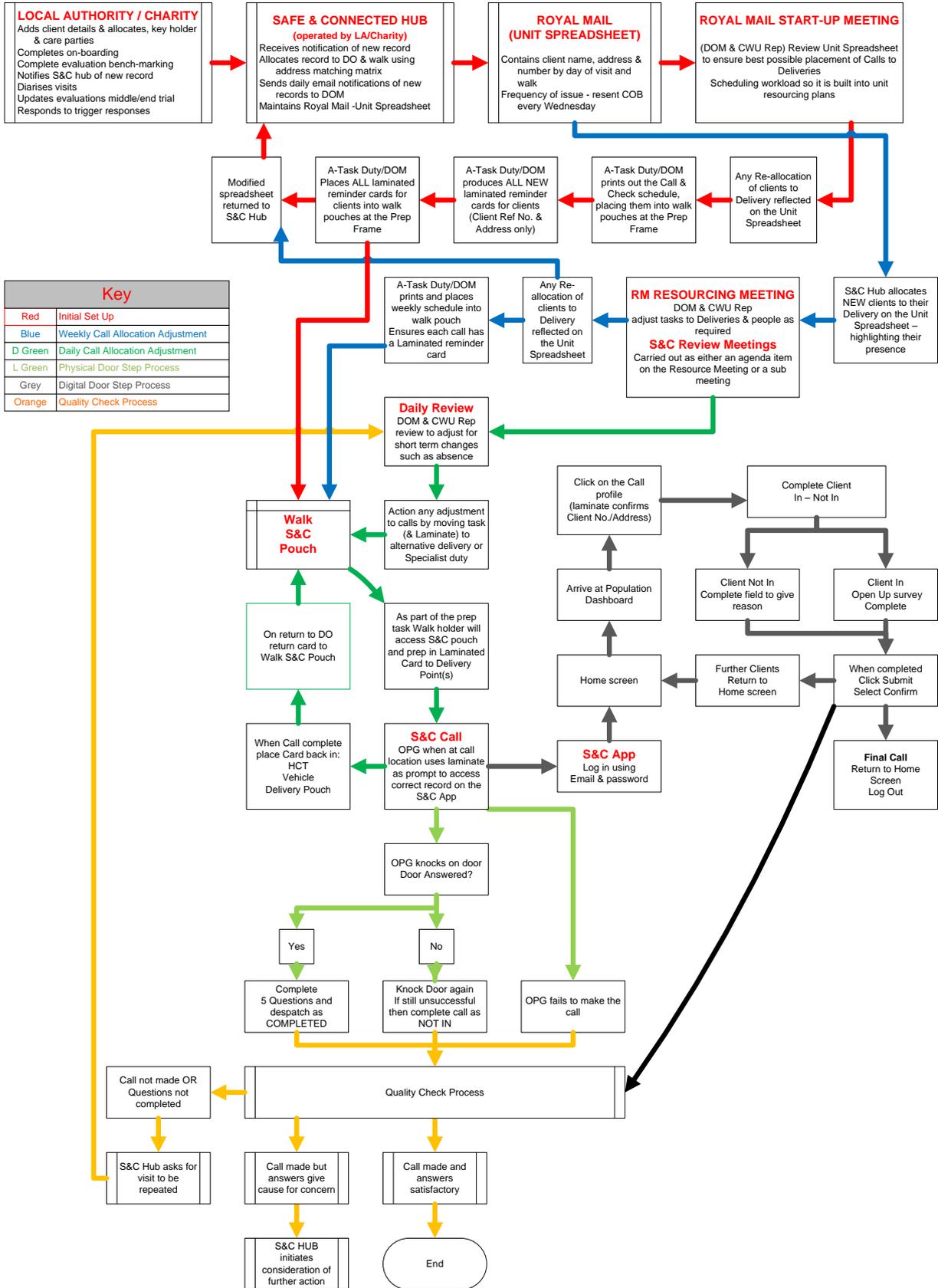
Signed

Anton Harding - Royal Mail
UK Delivery Operations Director

Mark Baulch – CWU
CWU Assistant Secretary

August 2018

Safe & Connected: Operational End to End Process (Safe & Connected Hub and Royal Mail)



The question transcript:

Safe & Connected - The 5 Questions and the Doorstep Script

- *Hi Mr/Mrs/X [potentially first name if known/preferred when data is collected during recruitment].*
- *My name is XX. I'm here today as part of the visits you've signed up to getting from Royal Mail.*
- *I just have some questions to ask you. Is that Okay? Great, thank you*

Q1: Health: Compared with last time I visited, how is your health?

Answer: Better / Same / Worse

Q2: Wellbeing: Overall, how happy have you felt this week?

Answer: 0 is 'not at all happy' to 10 is 'completely happy'

Q3 Social Connectivity: Have you been having any difficulty this week taking part in social activities or events?

Answer: Yes or No

Q4. Crime: Are you having problems with anyone bothering you?

Answer: Yes or No

Q5. Needs; Do you think it would be useful to talk to someone from the Early Intervention Team about anything you may need help with or that is worrying you?

Answer: Yes or No

- *That's lovely. Thank you.*
- *Either I or one of my colleagues will pop by and see how you're doing on [insert DOTW as will be known from the scheduling].*
- *[I'll ask the Early Intervention Team to get in touch with you to talk about what you've said].*
- *Goodbye – see you next time.*