**Briefing 21 April 2023**

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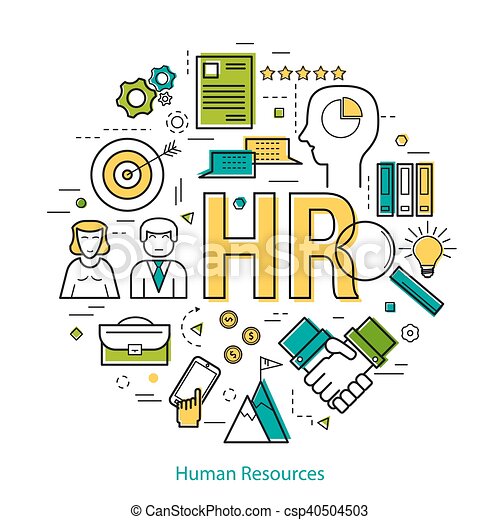
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1. **Office and Facilities Update**

“Someone forgot to tell Tanya the milk ran out; now we can’t make coffee…How Dairy!”

Please remember to look out around the office and be mindful that if you see any stationery, envelopes, kitchen essentials, or the like running out or getting low, you need to inform Tanya as soon as possible.

Whilst we have a casual dress code, it is essential that what you wear is still acceptable for meeting and greeting customers. Our dress code is detailed in your handbook. If you need to remind yourself of the content, please ask Tanya to email you a further copy. It is also available in the hallway before the stairs. Crop tops and gym stretch pants are not acceptable. Please avoid wearing any tight or inappropriate clothing to work.



1. **HR**

As April is nearing its end, please be aware of the bank holidays in May:

Monday 1 May – Early May Bank Holiday

Monday 8 May – Bank Holiday for the coronation of King Charles III

Monday 29 May – Spring Bank Holiday

You do not need to put your hours on Xero or BrightHR for the bank holiday; our system will automatically apply them. However, please remember our annual leave policy. If you wish to book time off around a bank holiday, it needs to be requested at least two weeks before, and will not be approved if another member of your team is off.

Please consider spreading your annual leave throughout the year. Many people use up all their annual leave through the summer, which can leave them feeling burnt out in the autumn and wintertime. Using your holiday effectively by spreading it out equally throughout the year will make sure that you are getting even rest and will have benefits for your mental health.

1. **Health & Safety Compliance**

PAT testing was completed in the office on Monday 17 April to ensure our devices meet electrical safety standards.

On Sunday 23 April at 3 pm there will be an emergency alert on everyone’s devices. This is a national test of the new emergency system. Your device may make a loud siren even if it is on silent, vibrate, flash and read out the alert. Please do not worry; it is only a test, do not panic.

1. A picture containing graphical user interface

   Description automatically generated**GDPR (General Data Protection Regulation)**

Crystal came into the office on Tuesday 18 April, to discuss our operation documentation and processes. This will be developed into flowcharts and process documentation. If anyone has any questions about GDPR or thinks they may have breached GDPR in any way, please let Tanya or Kirsty know as soon as possible, to be safe and prevent any further complications.

**Marketing**

The Marketing team have been looking at more way to improve our reach so have been writing more blogs, improving our Search Engine Optimisation on our website and answering more FAQs on our social media, which is receiving good engagement. We are also currently designing and ‘dressing up’ our duck, Michelle, for the Calne Duck Race. The Duck Race is being held on Saturday 13 May, come down and support our company duck!

1. **Admin and Operations**

***“Just keeping swimming…never give up!” – Dory, Finding Nemo***



Thank you to everyone for all their hard work to ensure the essential elements of the admin function are completed. We understand it has been stressful lately with a lot of annual leave.

We want to get the next appointment to the admin team correct, and therefore will not be rushing this. It is therefore essential that we work smarter. In order to be able to do this, we will need to work strictly to the hashtag system, from oldest to newest. If you are unclear on any instructions in an email, we need to see collaboration within the team to resolve the queries, before emails go back to case managers.

Please ensure that open-up and close-down are completed properly. It is the whole team’s responsibility to make sure that this is done at the beginning and end of the day. We should not be assuming or leaving it to one person. The best tool is communication – communication makes a team.

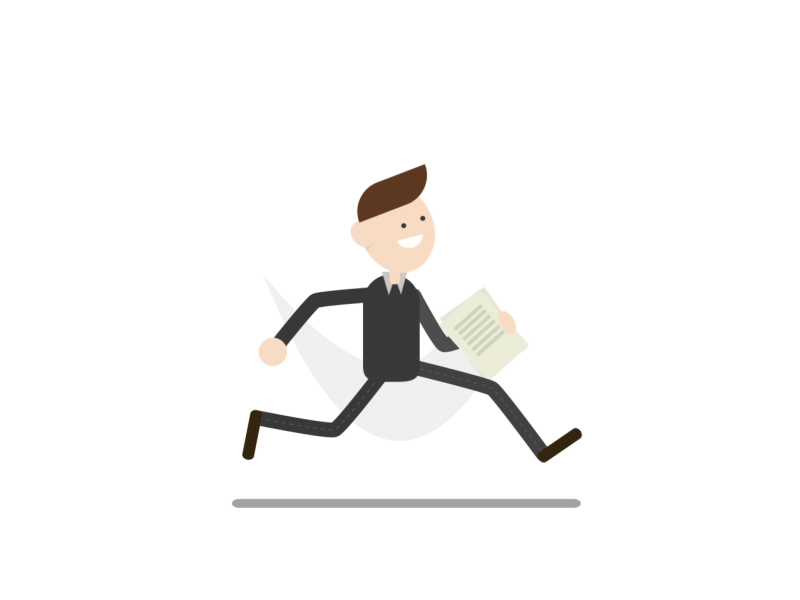
Remember to use PCB and FYI when sending emails to any case manager or Kirsty. This must be put at the beginning of the subject of the email. This helps them identify and prioritise their work. Please also use the # system to highlight the urgency and if any action is needed.

Our next admin meeting is due to take place on Wednesday 26 April 2023. Please read the previous meeting (22 February 2023) minutes before the meeting. In the meeting we will discuss training points, consistent errors, improvement, etc.

**Let’s talk Capsule:**

**This note is for all users of Capsule, not just the admin team.**

Please remember to RAN when you capsule. This is for the whole team to RAN not just the admin team. This ensures that the activity is clear to any team member reading it.



**R**eason – (reason for the call/email)

**A**ction – (what did you/they say)

**N**ext Step – (what are you/they doing next)

There have been a lot of duplicated people lately, please ensure before creating a person that they aren’t already set up on capsule. This often happens when we automatically add someone through the HQ site when sending a letter. Always double-check. If you noticed a duplicate person, check they are the same and merge them by pressing “edit” on their profile.

However, if someone has the same name as someone else on a different estate, please use our acronym system. For example, two different John Smiths on different estates. Use the initials of the estate name in the surname box of the profile to identify which belongs to which estate, this makes it easier when they call in, when contacting them, etc. For example, Mr John Smith on Doris Larkin King would be named “Mr John Smith – DLK”.

1. **Case Managers**

**The Stats:**

We currently have **886 open cases** on Capsule

An increase of **36** since the last briefing **(850)**

**478** of which are contracted

**59** are Family Finders, Family History, DNA, etc.

This year, we have contracted **97** cases so far, 35 in January and 21 in February, 23 in March and 18 in April so far. On average, we have contracted 0.90 cases a day – just over 1 per working day!

A few extra stats are below regarding how the cases we currently have contracted are being managed:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Case Manager** | **Contracted** | **Of which trust** | **of which external** | **Normal contracted** | **Uncontracted** | **Other** | **Total** |
| **KG** | 219 | 32 | 16 | 170 | 133 | 51 | 403 |
| **JG** | 216 | 30 | 43 | 142 | 106 | 8 | 330 |
| **DM** | 46 | 0 | 0 | 46 | 68 | 0 | 114 |
| **Totals** | 479 (KG & JG share two cases) | 62 | 59 | 358 (KG & JG share two cases) | 307 | 59[[1]](#footnote-2) | 850 |

Currently, our contracted cases are all at the following stages:

|  |  |  |  |
| --- | --- | --- | --- |
| **Certificates ordered** | 20 | **Legal issues** | 9 |
| **With the BVD** | 39 | **Final review** | 26 |
| **With the referrer** | 64 | **Estate accounts** | 11 |
| **With the Probate Registry** | 64 | **Held in trust** | 62 |
| **Missing Beneficiaries** | 97 | **Externally administrated** | 59 |

1. **Case Activity in the two last weeks**

**Total contracted cases since the last briefing:** 28

**Cases contracted since the last briefing:** Jean Steel, John Conrad Smith, Audrey Young, Joan Margaret Jordan, Enid Gertrude Malcolm, David Moore, Audrey Young, Sheila Gray, Shirley Ann Bourdon, Josephine Mary McNulty-Smith, Michael Thomas Yates, Dorothy Irene Hughes, Betty Gray, Patricia Godfrey Francesca Buckley, Kenneth Brant, Marilyn Farish, Paul Victor Hughes, Victoria Barker, John Charles Williams, Eyakas Tito Amoya Damparrpe, Robert Edwin Thomas, Donald Clarke, Beryl Fern, Paul Aback, John Alexander Johnston, Jenny Storey, Patricia Leaper, Roger Gwyn Griffiths, Reginald Peter Solomon, George Burr, Kenneth Michael Mortby, Linda Rosemary Richards, Malcolm Beardow

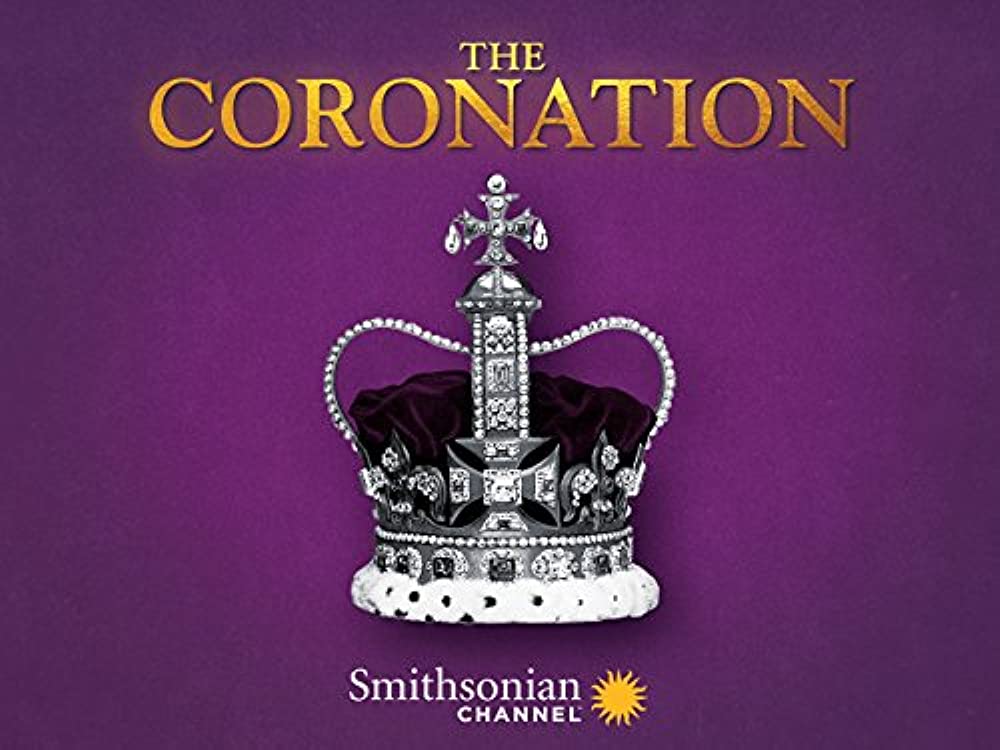
**Cases paid out since the last briefing:** Raymond Harold Hitchen, Carol Matthews, Wayne Brian Peppiatt, Olive Daisy May Cook, James Moore, David Malcolm Taylor, Barry Booth, Robert Phillips, Thomas Funnell, Doreen Marks, Beatrice Mabel Briggs and Robin Ballard

1. **Subcontractors**

Thanks as ever from the case management team for all your hard work. We have recently sent out updates on the sub-contractor cases which are running actively; there are plenty of them which speaks well to the high quality of work and dedication you show.

We would like to welcome our new subcontractor, Phil Manley of the Old Biscuit Tin. Welcome aboard, Phil!

Finally, just a word about scheduling. We do not, of course, ask you to work on set days as subcontractors, the decision is yours. One issue we are occasionally running into is that subcontractors are not evenly spread out through the week – one day, we will have seven, and the next day we will have two or even fewer. If you have any flexibility in your days, and you notice one day on the rota seems particularly full or empty, we’d be very grateful if you can ‘wiggle’ your hours to help fill those gaps.

1. **Miscellaneous**

**About the upcoming Coronation:**

The Coronation of Their Majesties King Charles III and Queen Camilla will take place on Saturday 6 May. The Coronation service will begin at 11am at Westminster Abbey. Both processions and the Coronation service will be broadcast live on national television, radio and online.

You can watch the Coronation processions in person at viewing areas along the procession route in London. You can watch the Coronation processions and service at the London screening sites in Hyde Park, The Green Park or St James’s Park, where the day’s events will be shown on large screens.

**There are coronation celebration events happening around our area:**

**Chippenham** – **Coronation Celebration by Town Council on 6 May 2023**

Located at John Coles Park, the council will live stream the coronation on a large screen. This will be followed by a live performance from the traditional John Coles Park bandstand. The band will play a collection of hits from soul legends including Marvin Gaye and Stevie Wonder. To finish the afternoon, there will be a showing of Disney’s Lion King (2019 live-action version) for everyone to enjoy.

**Corsham – Coronation creative market on 6 May 2023**

Located at Springfield Community Campus. To celebrate the King’s Coronation, there will be an extra-special event with face painting, royal-themed craft workshops for all ages, and live streaming of the Coronation! You will also find over 30 stalls selling a wide range of high-quality, locally produced arts and crafts including jewellery, ceramics, clothing, candles, woodwork, paintings, home-baked goodies and much more.

**Melksham – Semington Celebrates on 6 – 8 May 2023.**

Located at the Village Hall & High Street in Semington throughout the weekend. Events include a Flower Festival, a Church Service, Soapbox Distance Challenge, Street Picnic, Crown-making Competition, Table-decorating Competition, refreshments, a live band, a dance display and community volunteering events.

**Devizes – Rowde Coronation Fete on 7 May 2023.**

Located at the playing field off Tower View Road in Rowde, there any many events being held, such as Morris dancing and a circus workshop. There will be hot food and many kinds of refreshments provided. There will be a children’s royal fancy dress competition. The event is from 12.30 to 5.30, with a live music programme all afternoon.

**Not about the upcoming Coronation:**

OnSaturday 22 April, this week, our senior case manager James Green, in addition to celebrating four years at the company, will be conducting his first concert as conductor of Calne Choral Society. To commemorate Easter, the choir will be singing Stainer’s Crucifixion, as well as English folk songs arranged by Gustav Holst and Ralph Vaughan Williams’ Shakespeare Songs. The concert is held at St Mary’s Church in Calne at 7.30 pm – any local staff members who wish to attend will be a welcome sight in the audience for James.

**Tell us in the comments if you are planning on watching the coronation and if you are watching it at home or travelling to London to see it in person.**

If you have anything you would like to be added to the next briefing, including any fun facts to share, please email [sophie@family-wise.co.uk](mailto:sophie@family-wise.co.uk). Please submit this by **17 May 2023.**

1. Any other ‘other’ cases are managed by MB. [↑](#footnote-ref-2)