Minutes

Complaints Task Group, Meeting #7

Date: May 13, 2014
Time: 9am – 3:30pm
Place: CASA office, Edmonton

In attendance:

Name	Stakeholder group
Ann Baran	Southern Alberta Group for the Environment
Mike Bisaga	Lakeland Industrial Community Association
Keith Denman	Alberta Environment and Sustainable Resource Development
Jennifer Fowler	West Fraser - Hinton Pulp
Joseph Hnatiuk	Canadian Society of Environmental Biologists
Jim Lapp	City of Edmonton, Compost Operations
Tanya Moskal-Hébert	Alberta Agriculture and Rural Development
Dalene Wilkins	Alberta Energy Regulator
Celeste Dempster	CASA

Action Items:

Action Items	Who	Due
5.1: Ludmilla will inquire if Health Link Alberta protocol scripts can be shared.	Ludmilla	Meeting #8.
7.1: Celeste will distribute the wording from Directive 60 that relates to logging complaints.	Celeste	Meeting #8.
7.2: Celeste will speak to the Odour Assessment Task Group to see if any of their work might contribute to the work under 'Common Language'.	Celeste	Meeting #8.
7.3: Ann and Keith will investigate if there are any 'repeat caller' protocols currently in use.	Keith, Ann	Meeting #8.
7.4: Celeste will thoroughly document and diagram all of the discussions from meeting #7.	Celeste	ASAP.
7.5: Celeste will review the Odour Assessment Task Group proposals for scoping ideas about complaints.	Celeste	Meeting #8.
7.6: Celeste will send out the CASA RFP template for the task group to review ahead of meeting #8.	Celeste, all	Meeting #8.
7.7: Members will review all the material from meeting #7 and come prepared to discuss and scope the work under 'Who are you Going to Call?' and 'Common Language'.	All	Meeting #8.
7.8: Celeste will poll for three additional meeting dates (July, August, and September).	Celeste	ASAP.

1. Administrative Items

Jennifer chaired the meeting which began at 9:15am. Participants introduced themselves and were welcomed to the meeting. Quorum was achieved.

The agenda and meeting objectives were approved.

The minutes from meeting #6 were reviewed and approved with the following edits: several typos were noted. The action items from meeting #6:

Action Items	Who	Status
5.1: Ludmilla will inquire if Health Link Alberta protocol scripts can be shared.	Ludmilla	Carry forward.
6.1: Dalene will share the wording from Directive 60 that relates to tracking complaints.	Dalene	Complete.
6.2: Celeste will type up the small group analysis summaries of Questions 2-12.	Celeste	Complete.

Action Item 7.1: Celeste will distribute the wording from Directive 60 that relates to logging complaints.

2. CASA Update

Celeste provided an update on the Odour Management Team:
- The team met on April 30th to discuss how to action the remaining areas of work in the Project Charter. The team prepared workplans for the work under Prevention/Mitigation and Enforcement/Role of Regulation. The Odour Assessment Task Group will be taking on the work under Prevention/Mitigation while a new task group will be formed to undertake the work under Enforcement/Role of Regulation. The work under Education/Communication/Awareness and Continuous Improvement will be taken on at the team level.
- The team anticipates that all task group work will be completed by the end of 2014.

There were no new updates on the work of the Odour Assessment and Health Task Groups. Meeting updates for these task groups can be found on the team login page.

Celeste provided an update on other CASA initiatives:
- The next CASA Board meeting will be June 5th in Calgary. At this time the Odour Management Team will be providing an update to the Board on progress made so far and next steps to action the remaining areas of work in the Project Charter.
- The CASA 20th year celebration will take place on June 6th in Calgary.

3. Grouping Strengths and Gaps

The task group grouped the strengths and gaps identified at meeting #6 into themes (see Appendix 1) and created a title for each theme. Each theme in the revised list represents an area where the task group could do work:

Themes: Strengths	Themes: Gaps
– Who are you going to call? – Caller experience – Initial response time – Investigation response – Data collection – Sharing information between groups – Data analysis – Tools and technology – Attitude	– Contacts options (technology) – Who are you going to call? (awareness) – Common language – Initial response time – Tool and technology for odour assessment – Investigation response – Data collection – Sharing information between groups – Area specific information – Awareness of complex issues – Data analysis – Training

The task group noted that there was overlap in the themes identified in strengths and gaps. The links highlight strengths we can incorporate and build on to address reciprocal gaps.

The task group then organized the themes according to the four tool areas outlined on page 3 of their workplan. The purpose of this exercise was to ensure that the direction in which the group is headed aligns with the team's expectations. Some themes fell into more than one tool area while others did not fall into any tool area.

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	1.Tools for handling complaint response that will assist responders	2.Tools to support the follow-up process after a complaint is received	3.Tools that focus on tracking mechanism	4.Tools that easily illustrate how complaints are received, documented and responded to in Alberta	Other	Work required, but is being handled by the Odour Assessment Task Group
Strengths						
Caller Experience	X					
Data Collection	X					
Initial Response Time	X	X				
Investigation Response		X				
Data Analysis			X			
Who are you Going to Call?				X		
Sharing Information Between Groups	X	X	X	X		
Attitude					X	
Tools and Technology						X
Gaps						
Common Language	X					
Data Collection	X					
Training	X					
Initial Response time	X	X				

Area Specific Information	X	X				
Awareness of Complex Issues	X	X				
Investigation Response		X				
Data Analysis			X			
Contact Options (technology)				X		
Who are you Going to Call? (awareness)				X		
Sharing Information Between Groups	X	X	X	X		
Tools and Technology for Odour Assessment						X

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4. Prioritization of the Work Ahead

The task group began prioritizing the work ahead by discussing each of the themes (minus those identified as the purview of the Odour Assessment Task Group but including 'Repeat Callers' –see Item 5) in terms of:

- Consequence: What are the consequences if work is not completed in this area? What are the benefits if work is completed?
- Short vs Long-term: Is this work a short-term or long-term prospect? How does this fit with the timelines of this task group?

Using this criteria, each theme was placed in the prioritization matrix (see Appendix 2), which allowed the task group to identify areas of primary work (short-term, high consequence) and areas of secondary work (long-term, high/low consequence).

The task group plans to address each area of work. In the primary areas of work, the task group will focus on:

- Creating products (such as tools, advice, guidance) that can be included in the Good Practice Guide as well as any associated recommendations.

In the secondary areas of work, the task group will focus on:

- Having a conversation and developing recommendations (such as advice for future work) that can be included in the team's final report to the Board.

The task group will first focus on the primary areas of work, then start on secondary areas of work. Item 6 (Next Steps) offers further information on the task group's initial scoping thoughts on the primary areas of work.

Primary Areas of Work	Secondary Areas of Work
– Caller experience	– Data analysis
– Training	– Attitude
– Who are you going to call?	– Awareness of complex issues
– Initial response time	– Sharing information between groups
– Data collection	– Area specific information
– Common language	– Contact options
– Investigation response	
– Repeat callers	

5. Frequent Callers

At meeting #6, the task group identified 'frequent callers' or 'repeat callers' as an item requiring further discussion. The task group discussed their experiences with repeat callers and how this item relates to the work of this group, with highlights as follows:

- Communication with complainants is very important.
- The same person calling repeatedly about the same issue can be a sign that the issue has not been resolved.
- Some people are hypersensitive to odour and so may call more frequently about an issue.

- A repeat call could indicate that there are different expectations about what resolution of an issue looks like (the caller has a different expectation than the facility or government agency).
- A small number of people may have an agenda beyond issue resolution that motivates repeat calls.
- Some repeat callers can be abusive to phone operators.
- It's important to note that it is not possible to achieve zero odour nor does Alberta regulate to zero odour.
- Repeat callers are usually a minority but managing these issues can involve significant resources.
- It would be valuable to provide some advice to industry and government about how to handle repeat callers.

The task group decided to add 'Repeat Callers' to the prioritization matrix under Item 4.

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6. Next Steps

The task group discussed next steps for the priority areas of work identified in Item 4:

Primary Areas of Work	Who will do this work?	Is there a logical sequence in which to take on the work?	Initial Scoping Thoughts: What does this piece look like?
Who are you Going to Call?	Consultant	A	– The task group discussed that this work involves two pieces: 1. Assembling information about who should call where. o The task group discussed the possibility of an electronic map that would indicate where people should call. 2. Communicating this information effectively (i.e. marketing, public awareness).
Common Language	Consultant	A	– This work relates to odour descriptors and helping complainants and operators to speak about odour. – It may link to Data Collection. – There could be a link with the work of the Odour Assessment Task Group.
Data Collection (on a complaint)	Task group	B	– There is a strong link between Data Collection and Data Analysis (secondary area of work). Information collected needs to be relevant for analysis. The task group noted that Data Analysis is a longer-term initiative (for example, creating a provincial database would be an intensive undertaking), but should be kept in mind. – The work under Data Collection should focus on helping those who don't collect data in a comprehensive way to do so (i.e. filling in the data collection gap). – There are many forms available to help with this work. – This could involve creating a minimum list of requirements for Data Collection which could be combined with other areas to create an "ISO" (International Standard Organization) style booklet.

			NB: ISO standards usually provide guidance about design and implementation, rather than templates.
Initial Response Time	Task group + writer	C	– Similar to Data Collection, the task group can use currently available knowledge to outline good practices in Alberta around Initial Response Time. For example: calling a complainant back within 24 hours. It would be part of the ISO-style booklet. – The task group would prepare the information to be included and have a writer prepare the deliverable.
Investigation Response	Task group + writer	D	– Similar to Data Collection, the task group can use currently available knowledge to outline guidance and good practices in Alberta around Investigation Response. For example: how long should you keep documentation, how to correspond with complainant (verbal, written), using a consistent process to triage calls, what to do if the odour is gone by the time an investigator arrives. It would be part of the ISO-style booklet. – The task group would prepare the information to be included and have a writer prepare the deliverable.
Repeat callers	Task group	As time permits	– This item requires a concerted conversation but is a lower priority for the group. This piece could potentially be a very large project on its own. The task group will focus on preparing some advice about how to approach repeat callers and possibly make recommendations for future work. – The task group could prepare advice for phone operators. – The task group noted that this a sensitive piece of work.
Training	Task group	Later piece	– Training is very important. – The task group noted that there are many vendors who offer training. – Rather than designing a training program, this work should focus on outlining what should be involved in training and the training itself would be done by vendors. – It is a later piece because earlier pieces could contribute to the task group's thoughts around training.
Caller Experience	Task group	Later piece	– The task group noted that improve Caller Experience should be an outcome of work in the other primary areas of work.

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Action Item 7.2: Celeste will speak to the Odour Assessment Task Group to see if any of their work might contribute to the work under 'Common Language'.

Action Item 7.3: Ann and Keith will investigate if there are any 'repeat caller' protocols currently in use.

The task group prepared a draft timeline:

Date	Task
Meeting #8: 19 June 2014	– Scope areas of work where a consultant is being used and prepared associated RFP
Week of 23 June 2014	Electronic review and approval of RFP by task group
Week of 30 June 2014	Electronic approval of RFP by OMT
Week of 7 July 2014	Post RFP
Meeting #9: TBA July 2014	– Scope areas of work where the task group is taking the lead
Meeting #10: TBA August 2014	– Review responses to RFP and choose the successful consultant
August to September/October 2014	– Liaise with consultant as they prepare deliverables – Complete areas of work where the task group is taking the lead – Speak with phone operators
October/November to December 2014	– Prepare deliverables and final report for the OMT
August to December 2014	– Incorporate feedback from stakeholders and the OMT on an ongoing basis

7. Budget Check-in
Based on the next steps outlined, the task group identified the following costs:
– Consultant
– Writer
– Cross-jurisdictional review: When scoping areas where the task group is taking the lead, the task group should consider upfront where a cross-jurisdictional review is required in order to estimate associated costs.
– Possible costs associated with speaking with operators (ex. travel costs)

The task group anticipates using their entire remaining budget to complete their work.

8. Meeting Wrap-up
The team reviewed the action items from today's meeting.

The objectives for meeting #8 are outlined under item 6. To prepare for meeting #8 there are several tasks that need to be completed:

Action Item 7.4: Celeste will thoroughly document and diagram all of the discussions from meeting #7.

Action Item 7.5: Celeste will review the Odour Assessment Task Group proposals for scoping ideas about complaints.

Action Item 7.6: Celeste will send out the CASA RFP template for the task group to review ahead of meeting #8.

Action Item 7.7: Members will review all the material from meeting #7 and come prepared to discuss and scope the work under 'Who are you Going to Call?' and 'Common Language'.

The task group agreed to set three additional meeting dates.

Action Item 7.8: Celeste will poll for three additional meeting dates (July, August, and September).

The meeting adjourned at 2:45pm.

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Appendix 1: Strengths and Gaps Thematic Groupings

The letters associated with strengths and gaps identified in the table below correspond to the lettering used during the initial analysis at meeting #6. For context about how strengths and gaps identified correspond to the 12 analysis questions, please refer to the minutes from meeting #6.

For logistical purposes (i.e. to save space), strengths and gaps are listed in the same table. A blank cell does not mean that information is missing, rather it means that the theme is only associated with strengths *or* gaps rather than both. It should also be noted that two gaps were accidentally excluded from the grouping exercise:

> bbb. What is the follow-up after the government hands off a complaint to another group?
> x. Ecosystem considerations (ex. Wildlife)

Theme	Strengths Identified	Gaps Identified
Caller Experience	C. People feel heard when they speak to a real person L. CIC scripts	

Common Language		z. Lack of common language to talk about odour (so that government and industry are talking about odour the same way)
		m. Odour descriptors: There is a large variation in types of odours (that are often activity specific and odour descriptors are not clearly defined (i.e. people don't know how to describe odour)
		gg. Subjectivity of odour
		k. Communication between non-experts on a complicated topic like odour is challenging
		   o Person taking a call may not be an expert
		   o The person calling is not an expert

Training		g. Inconsistencies in training: operators require both technical and people skills ee. Odour training for investigators from government and industry f. Non-1-800 number operators may not receive the same level of training as 1-800 number operators
Data Collection	O. Everyone does capture information	l. Inconsistencies between information collection forms

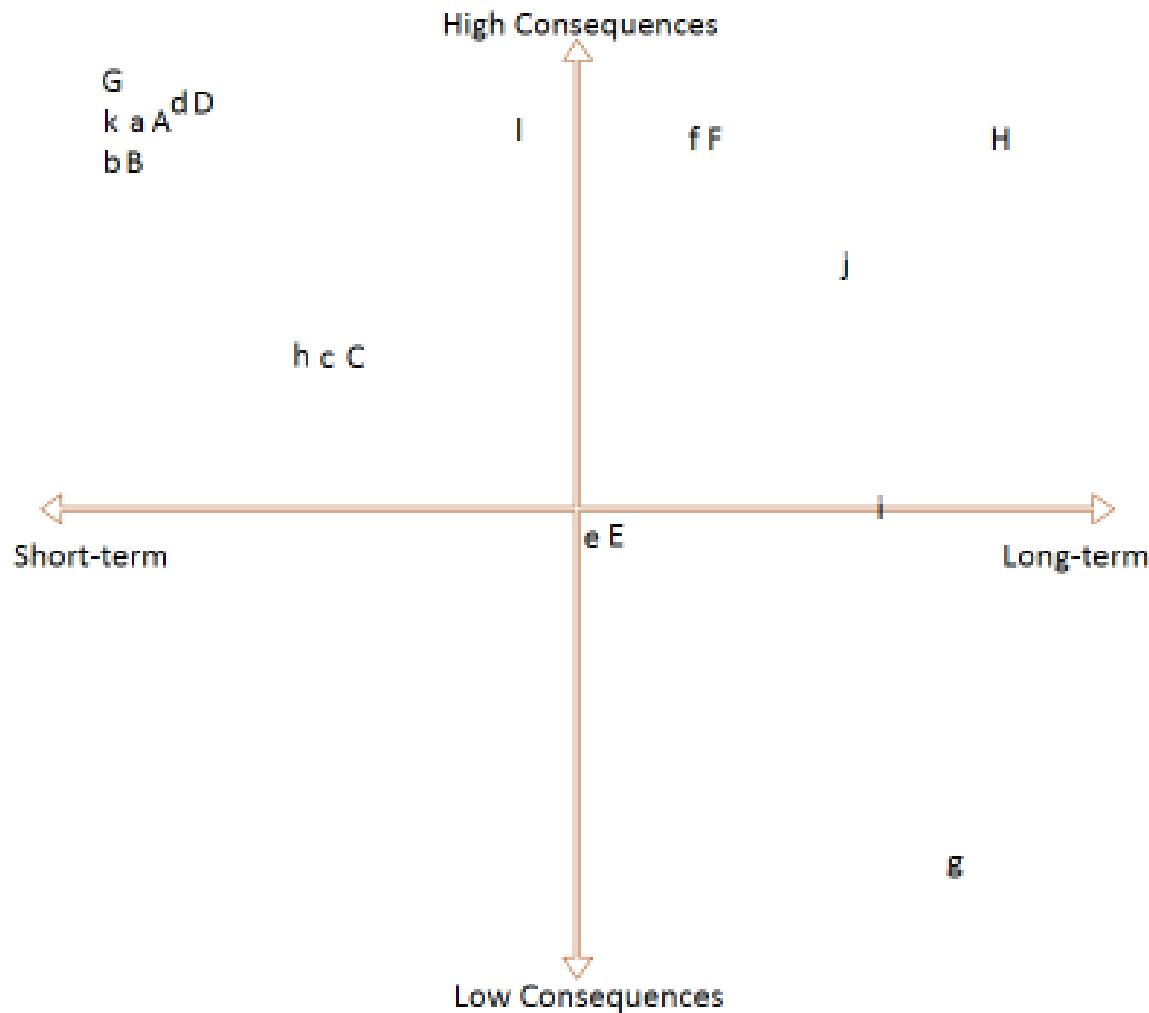|		
	F. Existing forms for collecting information (ex. NRCB, AER, ESRD) T. AER directive 60 requires industry to documents complaints and make available upon request S. Some approval conditions require tracking and reporting data annually P. NRCB process Q. Data collection is occurring by date/time, electronically	kkk. Consistency on information collected about an odour complaint ii. Lack of standardization of information collected o So data can talk to each other xx. Not all odour sources are required to report complaints o. Following up on anonymous complaints: may potentially have incomplete information that prevents follow-up (ex. no location) n. Information that may affect an odour complaint (ex. Wind, weather) is not always/consistently gathered from caller NB: this theme includes odour descriptors (see letter m under Common Language)
Initial Response Time	AA. Prompt follow-up (usually within 24-48 hours) as a result of a call CC. Public Health urgent response EE. Timely quick response	nn. Follow-up with complainant inconsistent or not timely w. Delay in communication of complaint to industry so they can respond in a timely manner (24-48 hours is usually too long because the odour may no longer be present) fff. Slow response s. Timely follow-up is crucial
Area Specific Information		cc. Understanding the current status of a region – impacts what is/is not acceptable j. Using regional knowledge to address an issue, put it into context, and communicate with the local population appropriately (including cultural diversity) u. Population density concept not built into response jjj. Incorporate density concept (i.e. local population) into response (urban, suburban, rural) uu. Regional differences lll. Identifying triggers for areas of 'chronic' concern and appropriate tools/response/investigations for these
Awareness of Complex Issues		tt. Cumulative effects vv. How to deal with multi-source hh. AAQOs (no exceedance, but odours still being reported)
Investigation Response	BB. Government triage process H. AER process	ggg. It is not well communicated/accepted/understood by the public that odour mitigation (if possible) takes time

	I. Communication process between ESRD and the City of Edmonton as well as the process between AER and industry N. People feel satisfied that any monitoring is being done FF. Odour mitigation (if possible) takes time and this is recognized	p. Ability to fix the problem specific to the complaint v. Identifying when a response is complete and defining the 'out' ddd. Lack of distinction of difference in time scale between call (response to complaint) and final resolution of an issue (management of issue) ll. Lack of timely enforcement r. Source may not be known which makes follow-up challenging hhh. Investigation/response matrix development ss. Consistency on how many complaints trigger a response t. Resources (staff) may not be immediately available in the area NB: How are media requests handled? Is this a gap?
Data Analysis	R. Data is analyzed by season and time of day/activity	ww. If information is being tracked, standardizing for trending and evaluation pp. Only temporal data is tracked/analyzed, collection is needed on weather and odour descriptors rr. Some industries do not track complaint data jj. Lack of tracking/trending of data qq. No follow-up on closed files oo. No performance measures to indicate whether the process is working/not working – Audit of records by third party
Contact Options (technology)		b. Phones are not accessible for people with hearing loss d. Internet-based systems for reporting complaints
Who are you Going to Call? / Who are you Going to Call? (awareness)	B. Calling the source (ex. a specific facility) can be an effective was to resolve an issue D. The 1-800 numbers are dealing appropriately with phone calls referencing odour complaints A. The 1-800 numbers are useful when they are used E. The 1-800 number operators have training	c. Wrong initial contact can lead to callers being 'bounced around' nnn. Proper referrals to avoid 'bouncing around' mmm. Early contact can de-escalate emotions a. Awareness: people don't know who to call h. Callers being 'bounced around' i. 1-800 numbers are not area or industry specific e. Many industry, municipalities do not have a system in place

		to manage odour complaints
Sharing Information Between Groups	DD. Reactive Communication Plan by regulatory body or industry W. Government transboundary communication (provincial to federal – single window), (province to province?) U. Awareness of FOIP and Health Information Act (HIA) V. Government (CIC) triage process to share information with other agencies NB: this includes regulators	ccc. Government triage does not extend outside to others (non-government) yy. No formal information sharing process eee. Proactive Communication Plan for all stakeholders aaa. Clear FOIP/HIA practices that allow sharing between groups zz. Information access is inconsistent ooo. Communication between bureaucracy and politicians mm. Public reporting of information kk. Sharing information locally so can get an idea of the big picture NB: this includes regulators

Tools and Technology/Tools and Technology for Odour Assessment	J. There are various tools used
	M. New technology
	X. Third party monitoring/complaint investigation (adds credibility)
	    Ex. WCAS monitoring station for Hinton Pulp
	    Ex. Third party odour surveys for EWMC
	K. There is a desire to create new tools
		bb. Regulators need to keep up with new technology
		ff. Some investigation equipment is emissions rather than odour-based
		q. Tools available/used can change based on regulation and jurisdiction
		y. Lack of consistency across tools
		dd. Best available technology vs best 'economical available technology for monitoring and odour abatement (a technology may be available but too expensive to feasibly install)
		aa. Regulation and enforcement tools
		iii. Education and response tools (i.e. form, odour wheel, source fact sheets)

Attitude	G. All sectors are passionate about fixing the problem	

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Appendix 2: Prioritization Matrix

High Consequences

G
k a A dD
b B

I   f F   H

                        J

h c C

Short-term ←———————————————————————→ Long-term
                    e E   l

                                    g

Low Consequences

Themes: Strengths
A. Who are you going to call?
B. Initial response time
C. Investigation response
D. Data collection
E. Sharing information between groups
F. Data analysis
G. Caller experience
H. Attitude

Themes: Gaps
a. Who are you going to call? (awareness)
b. Initial response time
c. Investigation response
d. Data collection
e. Sharing information between groups
f. Data analysis
g. Contacts options (technology)
h. Common language
i. Area specific information
j. Awareness of complex issues
k. Training
l. Repeat caller