



Customer Excellence Panel

Customer Charter Review

September 2010



Report by
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Acknowledgements

A special thanks to the Customer Excellence Panel members who took the time to carry out this review.

The review was facilitated by Nina Peters (Performance and Intelligence Manager) and Jennifer Hilton Research and Performance Graduate Trainee.

Introduction

Purpose

The purpose of this report is to summarise the findings of the Customer Excellence Panel (CEP) review of the Customer Charter.

The review was carried out between August and September 2010.

Background

Helena Partnerships want to ensure that our customers are at the heart of everything we do. We want to demonstrate that we continually improve and deliver customer led services.

The Tenant Services Authority (TSA) expects housing associations to have a clear strategy for involving tenants and residents in influencing and monitoring service delivery.

Tenants should be clear on how they can be involved in managing their homes, and Helena must demonstrate how services have been modified in response to tenant views.

Over recent years there has been increased emphasis on tenant led regulation; ensuring housing associations are accountable to its customers.

“Making services and decisions accountable to, and contestable by, residents, and responding to the resident voice, are vital to achieving... excellence in housing.”
Chartered Institute of Housing, 2008

“We expect all housing associations to clearly show how their services have been commented on and influenced by the people living in their homes...We also expect housing associations to be able to show that responding to residents’ views is something that runs through all their activities as part of their culture and the way they deliver services.”
Housing Corporation, 2007

Helena has already made successful inroads to achieving this through its Customer Excellence and Resident Involvement Strategies, by providing greater opportunities for tenants to influence the decision-making process and shape the services that they receive. The Customer Excellence Panel is just one of a range of initiatives aimed at achieving this.

The Customer Excellence Strategy aims to ensure we deliver a high quality service based on what matters most to our tenants. We want to ensure that we continually improve and deliver customer led services.

The creation of the Customer Excellence Strategy has led to the creation of the Customer Excellence Panel.

The diagram on the following page identifies the different tenant groups within the Customer Excellence Strategy.

About the Customer Excellence Panel

The Customer Excellence Panel (CEP) was established to provide an enhanced scrutiny role across the services Helena provides. Scrutiny is an important function, which helps to ensure that our customers receive high quality services that are relevant to their needs and demonstrate value for money. It adds a new dimension to Helena’s decision-making process by examining and questioning performance and decisions made by the organisation from a tenant’s perspective.

The Customer Excellence Panel have a key role within the Customer Excellence Strategy in helping to improve customer satisfaction and raise the percentage of very satisfied tenants. It will help ensure that tenants play an active role in shaping service delivery and identifying areas for improvement.

Helena Homes has a total of nine trained Customer Excellence Panel members who are able to conduct reviews on our different services.

The Customer Excellence Panel will continue to conduct service reviews throughout the upcoming year. A timetable has been developed and is available to view on the Customer Excellence section of highway.

The schedule of reviews was agreed between the Performance and Intelligence Team and the CEP based on the current corporate priorities and aspects that tenants have identified as key drivers of satisfaction. A copy of the review schedule for 2010/11 can be found on Highway within the Customer Excellence Project section.

The diagram below displays the groups involved within the Customer Excellence Strategy and their direction of feedback.



Aims of the Customer Excellence Panel

The aim of the panel is to help Helena deliver better services by ensuring tenants are able to influence service design and hold Helena to account for performance.

The panel's role is not as a consultation group to advise on policy and procedure, but as a scrutiny panel to monitor and challenge the way in which services are provided. The panel aims to regularly review Helena's performance, actively challenging the way in which we deliver services to assist us in continuous improvement.

The panel will draw on wider sources of information to ensure that they represent the views of the majority of tenants (and residents where applicable). Such information includes customer satisfaction surveys and complaint feedback.

The panel enables tenants to have a greater role in:

- Defining what is important and expressing preference in shaping service delivery, including reviewing and setting service standards
- Monitoring performance and holding Helena to account

In doing this it is hoped that the role of the CEP will help us to increase customer satisfaction with the services Helena provides

Overall the approach will help to further embed a customer focus in the way that Helena behaves, which will lead to better services for customers.

Review Process

The panel has received independent training and support (from the Northern Housing Consortium) in order to build confidence and capacity in their role.

The review entails an overview of service delivery and performance, and questions whether the CEP can further develop a service to improve customer satisfaction and value for money.

To do this the panel is provided with a range of performance information and scrutiny activities to ensure they accurately reflect the customer's experience. The information provided includes:

- Performance data
 - against targets
 - over the past three years (trend analysis)
 - against similar organisations (benchmark information)
- Customer feedback to determine what matters most to tenants
- Complaints information
- Positive feedback and compliments
- Best practice information from other organisations
- Activity Based Costing (ABC) information
- Service Standards
- Findings from Customer Inspector reviews
- One Voice survey findings
- GIS maps to identify geographical trends (where applicable)
- Customer Insight information
- Other information as required

The panel use the stated information to gauge a view of how well a service is performing and ensure that we are working towards meeting tenant priorities and providing value for money. This then enables the panel to recommend service improvements.

If further information is required the panel can request questions to be put to the One Voice tenant panel, or they can request an inspection or a mystery shop by the Customer Inspectors.

As part of the review the panel are also given the opportunity to meet and discuss the service areas performance with the relevant service managers.

This approach helps to ensure that Helena keeps tenants at the heart of service delivery and that tenant views and opinions are a key consideration in the decision-making process.

Service Review of the Customer Charter

This is the sixth review undertaken by the panel.

In April 2010 we sent all our customers a copy of 'Our promise to you' document which outlines our promises for the next five years. The document outlines what we are going to do to improve our services in line with what matters most to our tenants.

To ensure we are meeting the promises outlined in the document we must ensure that our service standards are in line with our promises to ensure continuous monitoring is underway to demonstrate if our set promises are being met.

The Customer Excellence Panel have conducted a full review of the Customer Charter and the service standards contained within it.

A number of breakout sessions were held throughout the presentation in order for the panel to discuss their views and opinions, ask questions and challenge service standards.

The breakout sessions were considered around:

- What matters most to Helena Tenants?
- Monitoring our performance in line with our promises
- Are we monitoring the right things?
- What improvements do tenants want considering the key promises?

Key members of staff were invited to attend to the meeting to respond to any questions the panel raised and explain any reasoning behind decisions made.

A follow up meeting was held to agree final recommendations, which are outlined within this report.

The development of the Customer Charter was done so by consulting managers and team in all service areas across Helena. The Customer Excellence Strategy group took a key part in it development.

Meeting the TSA standards highlights the service standards contained with each of the TSA standards and therefore methods of monitoring links also to the Promises set out specifically ones linking to the TSA standards.

Aims of the Review

Specifically relating to the Customer Charter, the review aimed to:

- Consider the key changes to the service standards
- Recommend areas of improvement and identify actions
- Approve content
- Agree key milestones

Approach to the Customer Charter review

The Performance and Intelligence team presented an overview of the Customer Charter informing the panel members that the document will outline all our service standards along with how they will be monitored and consequences of not meeting the standard.

Tenants will also be informed of how they can get involved with monitoring our service standards, this will be outlined within the Customer Charter.

All the service standards have been set and agreed via a variety of consultation with our tenants. Consultation methods included:

- Surveys
- Focus groups
- Customer Excellence Research
- Listening days
- STATUS 2009
- Customer Excellence Panel reviews
- Mystery shoppers
- Complaints
- One Voice consultation

Outcomes

A new and revised set of service standards in line with the new promises will be developed as a result of this service review.

Ensuring the service standards are in line with the promises enables continuous monitoring mechanism.

The Customer Excellence Panel will enable the following outcomes to be demonstrated:

- Excellence focused Customer Charter
- Regular tenant scrutiny and challenge
- Performance reported regularly to tenant

Findings

How are we performing?

The majority of the recommendations suggested by the Customer Excellence Panel were taken on board by service managers and included as part of their element of the service standards within the customer charter. The only one not to be included relates to the timescales of signing a tenancy agreement this was down to the idea that a customer requires flexibility and therefore attaching a set time scale would prevent this which is why the standard now reads

...When you are ready to move into your new home we will:

- *Arrange for you to sign your tenancy agreement at a time that is convenient to both you and Helena...*

Outcomes of the service review/Recommendations

When we get in touch with you

The Customer Excellence Panel completed a service review of One Call in March 2010, an outcome of this review as recommended by the Mystery Shoppers was to ensure the One Call

advisor stated their name at the end of a call as well as at the beginning. This was to ensure the customer was aware of the member staff that had dealt with their enquiry and not forgotten during the call.

This led the panel members to suggest that this continues and is included as part of the service standards.

This has now been agreed as a standard and will be included within the Customer Charter and is as follows.

...When we talk to you on the phone:

- *We will tell you who you are speaking to at the beginning and at the end of a conversation when you call One Call...*

The panel members agreed that all other service standards contained within the 'When we get in touch standard' to be reasonable and to reflect what matters most to tenants.

The promises section 'Making it easier to get in touch and have your say' was considered to be reflected within the standards and therefore the panel were happy that this promise would be monitored.

Home Standard

Moving into your new home

The panel members suggested that we should make it clear that there is a new standard to keep gardens clean and tidy while properties are empty and that gardens will be off a certain standard before a new tenant moves in.

The panel suggested that new tenants are made aware of the different opportunities to be involved including how to contact their nearest Tenants and Residents Association.

The panel considered that the standard relating to shutters should be more specific and highlight that the standard should reflect that polycarbonate shutters are used.

It was suggested by panel members that when moving into a new home tenants are provided with details of what can be expected in terms of the condition and quality of their home.

The panel were particularly interested with the standard of the property for new tenants and will look at this in further detail during the full review of the Voids and Lettings service. This will take place in April 2011.

The panel suggested that the standard relating to the sign up of the tenancy agreement should be more specific, they considered the wording to be too open and suggested that a timescale is mentioned. Although managers were in support of a more specific timescale for the standard relating to the signing of a tenancy agreement it was felt that more flexibility was required to ensure the time is convenient for the new tenant.

The standard has been amended to:

...When you are ready to move into your new home we will:

- *Arrange for you to sign your tenancy agreement at a time that is convenient to both you and Helena...*

The panel agreed that all other standards within this section were reasonable and met tenants expectations.

...Our empty properties team will:

- *Put net curtains in the windows and where screens are needed we will use polycarbonate as a preference ...*
- *...Clear gardens and rubbish, strim overgrown grass and cut back overgrown hedges and bushes...*

The panel considered 'voids' to be an important aspect for tenants moving into a new home they there agreed that a full service review of voids will be conducted in January 2010. In preparation and to check that the service standards are being met the panel have requested a mystery shop of voids properties conducted by the Customer Inspectors.

The following standards when moving into a new home were agreed by the Customer Excellence Panel.

...When you are ready to move into your new home we will:

- *Provide you with a pack of relevant information about your home and the neighbourhood including the standard you can expect the property to be in when you accept it.*
- *Assist you to complete all relevant forms relating to the property including Housing Benefit and utilities application...*

Furnished Accommodation

Overall the panel felt that the standards relating to furnished accommodation were not clear and were not specific. The standards should make it clear on who is eligible for furnished accommodation.

The Customer Excellence Strategy group took this recommendation on board and the furnished accommodation standards would form a separate leaflet. The content has now been agreed and is awaiting publication.

The panel raised a number of issues relating to furnished accommodation service standards these are detailed in the following and points.

The panel suggested that all tenants in furnished accommodation should have access to a fridge freezer, it was felt that a freezer allows for better resource management for those on fixed and low incomes. *(This has now been included in the standard)*

...Fridge/Freezer or fridge with freezer box...

The panel also raised that sometimes an alternative flooring should be offered. The following has now been included in the standards

...or vinyl flooring coverings...

Panel members felt that the standard around repairs completed in 'emergency circumstances' could be clearer. It was suggested that there is a definition of what constitutes an emergency situation.

Further definition is required around what constitutes a repair that will be completed in two working days and those completed within eight working days.

The panel were interested about when items of furniture will be repaired or replaced

It was considered important to provide a definition of what a repair is and what is classed as 'damage through misuse' to reinforce of what we ask from you.

The panel also recommended that information be given around charitable organisations such as TANGO

Repairing and replacing furniture and equipment

If you report a faulty cooker or fridge/freezer we will complete the repair within five working days. If the appliance cannot be repaired a replacement will be delivered within two working days

*Repairs to other items such as: washing machines, dining tables and chairs, sofas, beds, bedroom furniture and floor covering will be completed within five working days. If the item cannot be repaired a replacement will be delivered within eight working days
(Added by managers from CEP feedback)*

These points led the panel to consider it to be beneficial to provide furnished accommodation tenants with an information leaflet highlighting all the standards along with any additional useful information.

The panel suggested that the leaflet for furnished accommodation should highlight who is eligible along with how to apply. Clear details of how to get in touch should be detailed on the leaflet.

In August 2011 the panel will conduct a full review of tenancy support which will include furnished accommodation and all aspects of the service will be reviewed in further detail along with the points raised during the service review of the Customer Charter.

Having work done on your home

The panel members requested that the service standard around the painting of woodwork be clearer and highlight specifically what woodwork is painted. The standard is now more specific and is detailed below.

...External Maintenance

- We will paint the external surfaces to your property which have been painted by Helena in the past, every six years. This includes woodwork, metal work, timber doors and attached outbuildings. Fencing will not be painted unless it has been erected as part of an estate refurbishment scheme and has been painted by Helena in the past...

Customer Excellence Research in 2009 highlighted that the tenants would like the following:

- "reduce the timescale for non-urgent repairs"
- "make it easier for tenants who aren't at home during the day to use the repairs service"
- "Let us know when work is delayed the reasons why"

Standards have been amended by managers as a result of this feedback and panel members are happy that the service standards reflect what matters most to tenants.

The following service standards have been developed as a result of the feedback:

- *Complete external repairs within three months*
- *We will offer appointments until 6pm during the week*
- *For those who are not home during the day we will offer appointments between 6pm and 8pm on Wednesdays and from 9am till 12 noon on Saturday.*
- *We will let you know if your repair is delayed for any reason and when it will be completed. This includes 'follow on repairs' that are needed to finish a job.*

Making improvements to your home

The panel members were happy with the service standards relating to improvements to your home and no suggestions or recommendations were made.

Gas servicing

Panel members suggested including a contact number in the Customer Charter in case in case of any gas or carbon monoxide emergencies. As a result the following has been included in the Customer Charter.

"Contact Helena Homes immediately on 01744 67 78 83 if you know or suspect your gas appliance is not working correctly. If you smell gas or fumes you should contact the National Grid immediately on 0800 111 999"

The panel were happy with the specific service standards relating to gas servicing and had no further suggestions or recommendations.

Aids and Adaptations

The panel also considered it would be beneficial to tenants if a contact number is included at the beginning of the aids and adaptations section of the customer charter.

The panel considered this area to be something that is important to tenants and requested more detail about the service. A full review of Tenancy Support will be conducted in xxx 2010 and further details of this area will be provided and scrutinised by the panel during this review.

To assess customer satisfaction with the aids and adaptations survey a will be developed in partnerships with St Helens council also considering the views of the disability forum. Results of the survey will be available in preparation for the scheduled service review.

Estate Services

The panel members were happy with the service standards relating to estate services and no amendments to the newly implemented standards.

Green Space Service

The panel members were happy with the service standards relating to the Green Space service and had no suggested recommendations

Anti-Social Behaviour

The Customer Excellence panel conducted a review of the Anti-Social Behaviour service in November 2009, as a result of this review some amendments were made to the service standards, these changes have been reflected in the service standards within the Customer Charter.

Although the panel suggest no changes to the specific service standards it was recommended by panel members that scheduled estate walkabouts should be widely publicised and also clear details of what estate walkabout is and what they need to do to get involved to be included within the Customer Charter.

To incorporate the recommendations from the panel the following service standard has been incorporated:

...Our neighbourhood and anti-social behaviour teams will:

- *Publish details of when estate walkabout will take place:*
 - *In Helena Headlines*
 - *On the Helena Homes and Partnerships websites*
 - *On Helena's Digi TV site*
- *Publish information about when and where estate walkabouts will be held and will provide feedback about estates.,,*

Getting Involved

The panel recommended that information about how to get involved should be included as part of the new tenancy start up pack. In addition to this it was suggested that the Tenants and Resident Associations be fully informed of the menu of opportunities for involvement that Helena offers to tenants.

Equality and Diversity

It was suggested by the panel that the following standard should state 'vulnerable groups'.

Managers agreed and considered that all tenants should receive this service and therefore ensured it related to all of the tenant base.

...We aim to:

- *Make sure all of our tenants feel confident to live where they choose, free from harassment or prejudice...*

Complaints

The panel suggested that the service standards for complaints should specifically highlight how we inform a customer that their complaint has been received and logged and provide them with details of their reference number.

The information stated below has been inserted into the beginning and the end of the complaints service standards within the Customer Charter to ensure that tenants understand how to complain and also to link to the promises campaign.

“Information about how to make a complaint and Helena’s complaint procedure is available on Helena Home’s and Partnerships websites. Leaflets about how to complain will also be made available in all customer access areas”

“As part of the new promises campaign Helena has committed to publishing a new complaints procedure that is clear and easy to use”

To aid with a review of complaints the panel members requested examples of complaints that have been made anonymous.

The panel considered that the complaints service is important to tenants, as they also considered performance to require some improvement they have agreed that complaints performance is considered on a quarterly basis, this includes scrutiny of key performance indicators and tenant satisfaction.

Services for Older People

The panel were concerned that there were little mention of ‘vulnerable’ people within the ‘Welfare and Support’ section of the service standards.

The panel recommended that the life check that is offered to new tenants under the age of 25 should be offered to all vulnerable tenants.

Rent and Service Charges

The issuing of rent statements is currently under review, the One Voice panel have been questioned on their opinion to assess how useful they are and consider if they are good value for money.

The panel suggested that the contact details of the rents and rents arrears team are detailed at the beginning of the rent and service charges service standards within the Customer Charter. Contact details have now been incorporated.

It was recommended by the panel that the service standard relating to contacting those in arrears should be given a set timeframe. Managers agreed and have amended the service standard to the following.

...We aim to:

- *Contact you within one week of you missing a rent payment to let you know you have fallen behind...*

The panel were concerned that threatening rent arrears letters were issued to tenants too soon. It was therefore suggested that Helena should consider more friendly prompts when a tenant first falls into arrears. For example “...are you aware you are in arrears?...”

The panel had a number of aspects in relating to rents and service charges that they would be interested to discuss and scrutinise in further detail. It was therefore suggested by the panel that any additional issues be discussed as part of a full review of this area.

...For information about rent and service charges contact the rents team on 01744 637383...

Information we hold about you

The panel members were happy with the service standards relating to information we hold about you no amendments were suggested.

Next steps

Once the Customer Charter has been agreed by Board all members of staff will receive an update. The editorial panel will also review the final version of the document.

The completed Customer Charter will be distributed to all our tenants.

The service standards within the Customer Charter will continue to be monitored on a regular basis.