



# **Customer Excellence Panel**

## **STATUS Review**

**May 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), Graham Jones (Business Support Advisor) and Hannah Fitzhenry (Customer Insight Officer).

## **Purpose**

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

The review was carried out between February 2010 and April 2010.

## **Background**

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.

## **Introduction**

Helena Homes wants to ensure that our customers are at the heart of everything that we do.

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

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 by 25% over the next 5 years. It will help ensure that tenants play an active role in shaping service delivery and identifying areas for improvement.

## **About the Customer Excellence Panel (CEP)**

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.

## **Aims of the 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.

## **STATUS – Customer Excellence Panel Review**

This is the fifth review undertaken by the panel.

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.

### **Aims of the Review**

Specifically relating to STATUS, the review aimed to :

- Review and scrutinise performance & customer feedback
- Agree Customer Excellence Performance Indicators
- Recommend areas of improvement and identify actions
- Considering value for money and delivery of excellent services to tenants and residents.

### **Approach to the Review**

The Performance and Intelligence team presented an overview of performance to date drawing on the range of information outlined within the 'Review Process' section.

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 performance.

The breakout sessions were structured around:

- What matters most to Helena Tenants?
- How are we performing? (considering cost and value for money)
- Are we monitoring the right things?
- What improvements do tenants want?

Managers were invited to attend the meeting to respond to any questions the panel raised and explain any reasoning behind decisions made.

A wrap up session was held to develop an action plan. The action plan identified the recommended improvements highlighted by the 2009 STATUS survey.

## **Findings**

Overall panel members were happy with the results of the 2009 STATUS survey, only a small number of suggestions and requests have been made as a result of this review.

The panel consider 88% overall satisfaction to be high and are impressed that the corporate target of increasing the number of very satisfied by 25% has been met two years early.

In comparison to other similar organisations 88% satisfaction is high and is within the top quartile.

As with the other CEP reviews the panel will monitor a selection of Key Performance Indicators (KPI's) specifically taken from the 2009 STATUS survey. Details of the specific KPI's can be found in the 'Are we monitoring the right things?' section of this report.

The following sections of this report outline the findings, recommendations and actions that have been discussed as part of the review of the 2009 STATUS survey.

### **How are we performing?**

The panel considered the 2009 STATUS survey to highlight good performance with the majority of the survey demonstrating some level of improvement.

The overall satisfaction is high at 88% and is within the top quartile when compared with other similar organisations. The number of very satisfied has increased, this means that the corporate target of increasing the overall number of 'very satisfied' by 25% has been met.

Panel members are keen that all performance demonstrates an upward trend and have therefore suggested an increase by 1%, however the panel also note that Helena should always aim to perform higher than the set target.

For the overall satisfaction with the service the panel have suggested a target of 89% increasing to 90% by 2012.

It was suggested that some tenants will always be dissatisfied with the service that is being provided however efforts should be made towards reducing those who express dissatisfaction.

Eight out of ten tenants are satisfied with their neighbourhood (41% very satisfied). Although the panel were aware that the percentage of those very satisfied has shown some improvement, the panel were concerned that there was no improvement to the overall satisfaction which remains at 80%.

The panel considered the increase of 3% for the 'quality of home' to demonstrate only a small improvement.

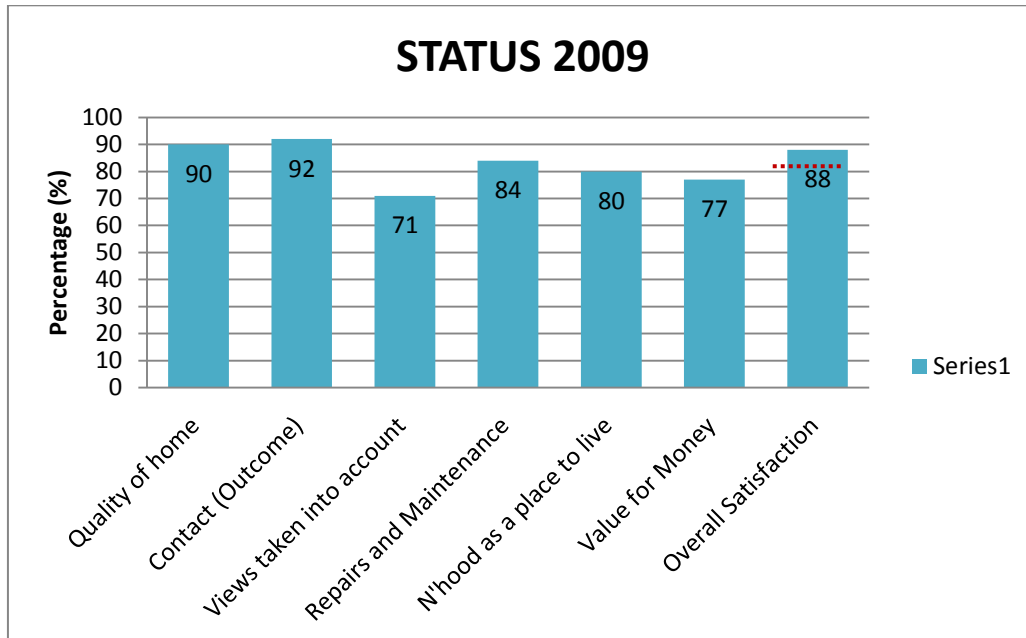
Voids and Lettings was considered an important issue for the tenants and therefore have requested a full review of the service. The review has been incorporated into the 2010/11 review schedule.

The panel considered that tenants will differ in their opinion of value for money as some do not directly contribute to their rent. To ensure value for money is continuing to be monitored it has been agreed that it will be incorporated into future service reviews.

## What matters most to tenants?

### Overall satisfaction

The graph below displays the customer's satisfaction of Helena Homes services.



Key:

..... = 86% National quartile (top quartile)

Overall the panel were impressed with the satisfaction levels for the different services demonstrated within the 2009 STATUS survey.

It was stated by a panel member that...

... "the service was clearly getting better".

The panel agreed that Helena's 'overall' performance demonstrates a clear improvement with an increase of satisfied tenants from 74% in 2004 to 85% in 2007 and a further increase again in 2009 to 88%. In 2009 almost half were very satisfied with the overall service and as a result the corporate target to increase the number of 'very satisfied' by 25% has been exceeded two years early. The panel were particularly impressed with this performance.

In comparison to other organisations the result of 88% overall rates highly and puts Helena's performance within the top quartile of similar organisations.

The panel suggested that the number of 'very satisfied' should be further increased and the number of 'dissatisfied' reduced. They therefore recommend that it demonstrates an upward trend. The panel suggested that the target for overall satisfaction to be set at 92% by 2012.

Significantly more customers aged 55+ gave positive satisfaction ratings with regards to the overall service received from Helena Homes. Satisfaction was also found to be higher amongst customers with long term health issues.

The panel are concerned with those customers who detailed that they were dissatisfied with the service and suggested focus is given to improving these customers' opinions. The panel suggested that further research is required.

The panel suggested that the target for overall performance in future STATUS surveys should demonstrate an upward trend.

### **Quality of home**

Nine out of ten tenants are satisfied with the quality of their home with 50% being very satisfied. Performance from 2007 to 2009 has shown an increase in the percentage of satisfied by 3%. The panel considered that the outcome of 'quality of home' could have shown a more significant increase given the improvement programme over the recent years.

The panel suggested that to increase those tenants who are satisfied with the quality of their home, the quality of the property when it is initially let should be considered for improvements.

The panel have suggested that the number of tenants who are satisfied with the quality of their home should demonstrate a steady increase.

The panel suggested that to increase performance the voids service standards should be high, however later considered that a tenant has ample opportunity to challenge the company with any areas of dissatisfaction. Although it is worth considering it must be highlighted that this was based on personal opinion rather than the results of the 2009 STATUS survey.

The panel highlighted that this element is an important issue for tenants and therefore have requested a full review of Lettings and Voids, this has been incorporated into the CEP's schedule for 2010/11.

In preparation for a review of this service the panel have requested that the Customer Inspectors conduct a reality check on a sample of void properties.

### **Contact**

Customer contact had demonstrated some improvements over a number of criteria, the panel were satisfied with the improvements which are displayed in the table below.

<b>2007</b>	<b>2009</b>	<b>Percentage increase</b>	<b>STATUS survey question</b>
71%	78%	+7%	Easy to get hold of the right person
81%	85%	+4%	Found the member of staff to be helpful
65%	72%	+7%	Satisfied with the outcome of the contact

### **Views taken into account**

Almost three quarters of tenants are satisfied that Helena Homes takes their views into account, (36% very satisfied)

This element has demonstrated significant improvements over the past three STATUS surveys from 59% in 2004 to 62% in 2007 and an increase of 9% puts current performance at 71%. The panel are impressed with this performance as when compared to other similar organisations the result is within the top quartile.

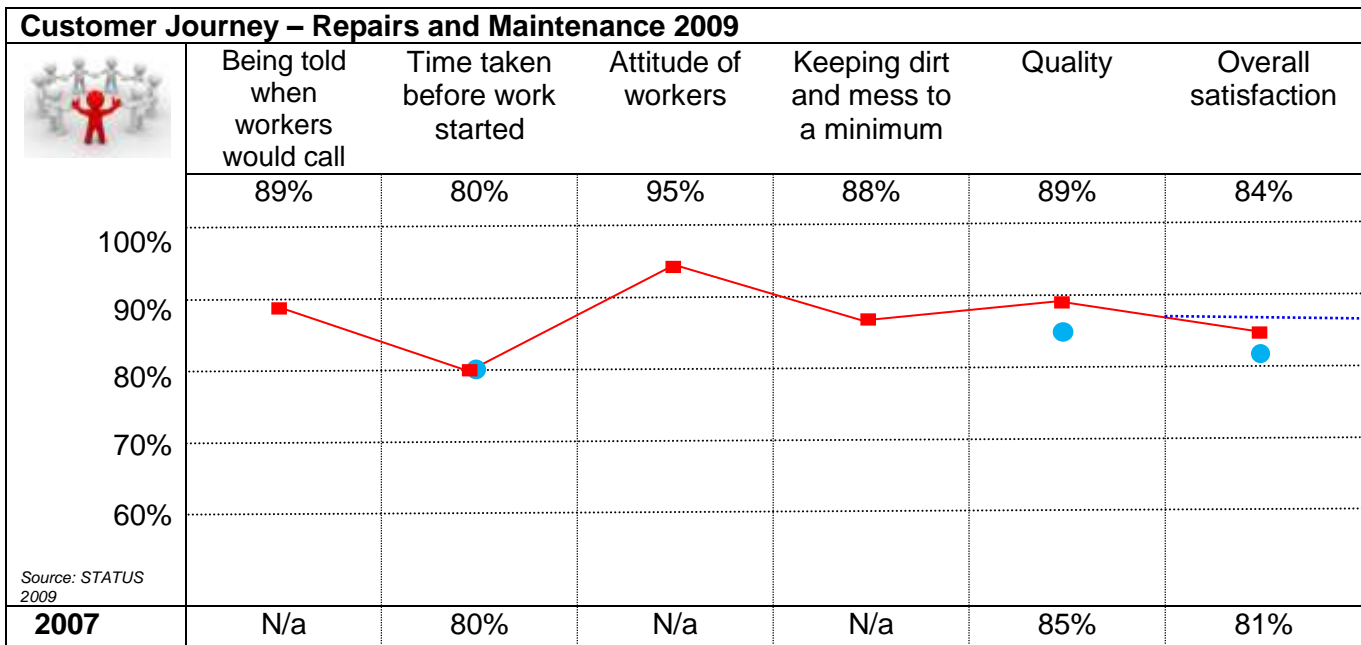


Customers aged 65+ were found to be significantly more likely to express a very satisfied rating with this aspect of service (48%) compared with younger age groups 16-34 (30%), 35-54 (25%), 55-64 years (29%).

Further information is required about what is making customers dissatisfied in regards to 'views taken into account'

**Repairs and Maintenance**

The diagram below is the customer's journey in terms of their satisfaction with the Repairs and Maintenance service.



**Key:**

- = Customer Satisfaction at different stages of the repairs and maintenance process in 2009
- ..... = National quartile (86%)
- = Customer Satisfaction at different stages of the repairs and maintenance process in 2007

Please note that three questions from the 2009 STATUS survey were not incorporated into the STATUS survey in 2007.

The result for the overall satisfaction for the 2009 STATUS survey demonstrates a positive improvement from 81% in 2007 to 84% in 2009. Almost half of tenants are 'very satisfied' with the Repairs and Maintenance service.

The CEP conducted a full review of the Repairs and Maintenance service in July/August 2009. The review concluded that the service is performing well in comparison to other organisations. This improvement confirms the outcomes of the CEP's review and again puts the performance within the top quartile of similar organisations.

The panel suggested that the improvement programme and new appointments system have had a positive impact on overall performance of Repairs and Maintenance which has been evident over the past three STATUS survey results (2004, 2007 and 2009).

The panel are concerned with ascertaining what makes tenants dissatisfied with the service specifically considering the following points.

- Customers aged 55+ were significantly more likely to award a very satisfied rating for Helena's Repairs and Maintenance service compared with 16-34 and 35-54 year olds.
- Significantly greater numbers of very satisfied responses were received by tenants with long term health issues or disabilities (49% very satisfied versus 42%, respectively).

### ***Neighbourhood as a place to live***

Eight out of ten tenants are satisfied with their Neighbourhood (41% very satisfied). Although the panel were aware that the number of 'very satisfied' had demonstrated some improvement, the panel were concerned that the overall result had shown no improvement as 80% satisfaction was the outcome from the previous STATUS survey in 2007.

The panel concluded that a 'plateau' had been reached.

Throughout the review of STATUS the panel requested further information about what is making tenants dissatisfied. They considered that those most likely to express dissatisfaction with their neighbourhood included customers living within the jurisdiction of Derbyshire Hill Office (19%), 16-34 year olds (23%), 35 – 54 year olds (19%), those who had contacted Helena Homes within the last twelve months (15%) and customers who had reported anti-social behaviour to Helena (33%).

Anti-social behavior was considered to have an adverse impact on the outcome of this question, the panel have recently conducted a review into nuisance and anti-social behavior and are monitoring this via a range of relevant KPI's.

In addition the panel suggested that tenants opinions of their area would change during the year as some problem may be seasonal, this led to the panel requesting some information about the context of the survey for future CEP reviews.

The panel's review of the Green Space service in January 2010 and updates of the service led them to suggest that the planned environmental improvements will have a positive impact on future opinions of neighborhoods. The panel are continuing to receive updates from the Green Spaces team on their plans and developments.

### ***Value for money***

In July 2010 the panel members took part in some value for money training which was conducted by Just Housing. The training ensures panel members have a good understanding of value for money and can continue to consider it as part of any specific service review.

77% of tenants are satisfied with value for money for their rent. (40% very satisfied). From 2007 to 2009 the percentage of those who are satisfied with value for money has decreased by 4%.

Customers who responded the most positively regarding rental value for money were sheltered tenants with 56% stating they were very satisfied compared with 31% of general needs customers.

To ensure value for money is continuing to be monitored the panel requested further information about value for money and tenants who were dissatisfied.

### **Are we monitoring the right things?**

The panel recognised the importance of the STATUS survey to provide a good method for benchmarking and identifying service improvements.

The panel are continuing to develop their own suite of Key Performance Indicators (KPI's). Whilst the panel recognise the need to monitor regulatory requirements and assess financial viability, they would also like to monitor issues that are important to tenants.

The panel were asked what performance information they would like to monitor in relation to the STATUS survey.

The following Performance Indicators from the STATUS survey will be reported to the panel as part of the Customer Excellence suite of KPI's:

- Satisfaction with overall services
- Dissatisfaction with overall services
- Satisfaction with Repairs and Maintenance
- Satisfaction views are taken into account
- Satisfaction with neighbourhood as a place to live

As previously detailed the panel are keen to measure tenants satisfaction with key services the following points were gathered during a target setting session with the panel.

- The panel are happy with the level of satisfaction for the overall service and One Call. The panel are therefore keen to monitor these to ensure performance doesn't dip.
- The panel consider the repairs and maintenance service to have a big impact on their overall level of satisfaction and therefore want to monitor it further.
- Panel members note that 'views taken into account' is hard to achieve as tenants do not always want to get involved in any of the different methods of engagement that Helena Homes offers. However it is also considered important to continue to monitor this element of the STATUS survey.

The STATUS survey is carried out on a three yearly basis and therefore the results of the next survey will be available in two years' time. The results of the next survey will be shared and scrutinised by the CEP. Continuous monitoring of satisfaction with Helena's services will be done so via the Research Strategy along with findings of CEP service reviews which will ensure a high performance is maintained and that Helena continues to listens to its tenants.

### **Panel Recommendations**

In order to increase the percentage of tenants satisfied with Helena's services the panel recommends the following:

- A full review of Lettings and Voids
- A mystery shop of void properties in preparation for a full review of Lettings and Voids.
- Percentage improvement should be at least 1% to demonstrate service improvements
- For the overall service the panel have suggested a target of 89% increasing to 90% by 2012.

- Request further information about what makes tenants dissatisfied
- Performance should show an upward trend this includes all CEP KPI's and elements of the STATUS survey.
- Increase the number of satisfied and decrease the number of dissatisfied
- Quality of home should demonstrate a steady improvement
- Continues Green Space updates
- Monitor value for money
- Context for future CEP reviews of STATUS surveys

### **Next Steps**

An action plan in response to the panel's findings has been agreed.

The outcomes will be presented to the Customer Excellence Strategy Group and Board.

The Customer Excellence KPI's identified as part of this review will be publicised to tenants via headlines and leaflets and other literature amended accordingly.

## Action Plan – STATUS Survey (2009) Review

Recommendation	Action	Reason	Service Area Response	Who	When
The Voids and Lettings services is considered as an important issue for tenants and therefore should be covered in detail	Full CEP service review of the Voids and Lettings service	The panel consider the service to be important to tenants, it is also considered that improvement to the voids service would have a positive impact on the satisfaction level of the 'quality of home' aspect of the STATUS survey.	A service review of Voids and Lettings and an Inspection of voids has been incorporated into the Customer Excellence Panels schedule for 2010/11.	PIT	April 11
	A reality check of voids in preparation for the service review		A Customer Inspectors mystery shop of the void properties will be conducted in preparation for the service review of Voids and Lettings	PIT	Jan 11
Further clarification on value for money	Continue to monitor value for money in CEP service reviews.	The overall percentage satisfied with 'value for money' has demonstrated no improvement. <i>(Although the number of very satisfied had shown some increase)</i>	Value for money will continue to be considered throughout the CEP's review of different service areas along with a more detailed review of Activity Based Costing (ABC) in March 2011.	PIT	On going
			To give the panel members a further understanding of Value for Money members were invited to take part in some training conducted by Just Housing	PIT	Completed
Context information for future reviews of the STATUS surveys.	Context information provided with the results of the next STATUS survey.	The panel suggested that tenant's opinions of their area would change during the year as some problem may be seasonal, this led to the panel requesting some information about the context of the survey for future CEP reviews.	Context information will be provided when the CEP review the next STATUS survey.	PIT	Next STATUS survey

Recommendation	Action	Reason	Service Area Response	Who	When
Increase the number of satisfied and decrease the number of dissatisfied	Further information on what makes tenants dissatisfied with the different services provide by Helena Partnerships.	Although some tenants will always be dissatisfied with the service being provided efforts should be made towards increasing their satisfaction with the services.	<p>Information was given about the results of key driver analysis. The analysis identified three areas that are driving satisfaction in the 2009 STATUS survey this is as follows:</p> <ul style="list-style-type: none"> <li>• Support provided to new tenants</li> <li>• Support provided to vulnerable tenants</li> <li>• How enquiries are dealt with</li> </ul> <p>Further information from specific satisfaction surveys will help to identify what's making tenants dissatisfied with elements of the different services. The CEP will be provided with the results of the satisfaction surveys in line with the service review of a specific service.</p>	PIT	<i>Ongoing</i>
All results of the STATUS survey should demonstrate an upward trend	Panel members suggest that performance should go up by 1% to demonstrate that services are improving. In addition for the overall service the panel have suggested a target of 89% increasing to 90% by 2012.	The panel consider that the number of those satisfied with the service should continue to be improved.	<p>The results of future STATUS surveys will be incorporated into the CEP's suite of KPI's along with a full review of the results.</p> <p>The CEP will be consulted on future annual target setting.</p>	<p>PIT</p> <p>PIT</p>	<p><i>Next STATUS survey</i></p> <p><i>Q4 2010/11</i></p>