



Customer Service Excellence

Assessment Report

for

A1 HOUSING BASSETLAW LTD

By Assessor:

Nick Page

On behalf of EMQC Ltd

Date of pre-assessment meeting:

27th February 2009

Date of evidence review:

1st May 2009

Dates of on-site visit:

6th – 7th May 2009

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1. Summary

Introduction and background

This assessment report covers the services provided by A1 Housing Bassetlaw Ltd (The Company). It includes a brief description of the organisation, the assessment methodology used and an overview of how The Company demonstrates compliance against Customer Service Excellence, the Government Standard.

A1 Housing was established as an ALMO in October 2004 by Bassetlaw District Council (The Council) to pursue the drive for excellence in delivering housing services, including decent homes for council tenants.

The housing stock of some 6,950 properties remains in the ownership of The Council. A1 Housing manages these and delivers its services from the main office in Carlton, near Worksop; there are further housing offices in both Worksop and Retford town centres, where easily accessible Property Shops form part of a one-stop-shop service with the county and district councils.

There are 215 staff in The Company, delivering a range of services that include Tenancy and Estate Management, Repairs and Maintenance, Decent Homes, Housing Income, Aids and Adaptations and other services. There is a strong focus throughout The Company on good customer service and on the involvement of customers in service development and improvement.

The Audit Commission inspection in 2007 resulted in The Company achieving a Two Star rating, a good service, with promising prospects for improvement.

Methodology

The assessment process was a full assessment against all elements of the Customer Service Excellence standard. A pre-assessment meeting was held on 27th February 2009. This comprised a preliminary review and gap analysis of the written evidence; discussion of the application format; and the formation of the Assessment Plan, including the people to be interviewed and the sites and services to be visited. A brief report, together with the Assessment Plan, was sent to the applicant after this meeting.

Documentary evidence was reviewed on 1st May 2009, with the assessment visit taking place over two days the following week. The schedule included one-to-one interviews with a number of key staff; group meetings with frontline staff and with customer representatives; visits to each office and to the property shops, where I was able to see services in action, talk with staff and meet a number of customers; accompanied visits to customers' homes, to see decent homes, repairs and warden services in action; and meetings with representatives of The Council, the Manton Community Alliance and a decent homes contractor in order to see how The Company works in partnership with others.

On completion of the assessment, I was able to provide feedback to the applicant on The Company's compliance with the Customer Service Excellence criteria and on my recommendation to the EMQC Certification Committee.

Summary of strengths

The Company has developed good insight into the needs and preferences of its customers; it consults them extensively and uses the results to inform service priorities and planning; and it seeks to engage and involve customers directly in service development. There are generally high levels of satisfaction with services and with the way in which they are delivered. There is a strong focus on customer service throughout The Company, in its leadership and in the professionalism and attitude of staff. Public information is of a high quality. You seek to make access to services easy for customers and you plan to improve this further through the development of new telephony systems. You work effectively in partnership with others, both at a strategic and operational level. Performance standards are met and, where there are mistakes, then The Company is able to learn from these. Staff work hard to provide timely responses and a good quality of customer service; again, they will be helped further in this through improvements to internal systems.

Conclusion and recommendation

A1 Housing Bassetlaw Ltd complies with the requirements of the Customer Service Excellence standard. I have highlighted some of the strengths of The Company and also areas for further development.

There are no actions that require immediate attention and I am pleased to pass on my recommendation to EMQC's Certification Committee that The Company be recognised as meeting the standard. Subject to confirmation from the Certification Committee, you will be awarded the Customer Service Excellence certificate, which will be valid for three years, subject to annual monitoring.

There are eight areas of partial compliance and a number of other areas highlighted for improvement and I recommend you include these within your service planning. Progress against these areas will be reviewed at your next visit which will take place in 12 months time.

I would like to thank you for your hospitality and co-operation; and particular thanks to Nicola Priest in her preparation for this assessment and to all those who contributed to the assessment visit itself.

Nick Page
(Assessing on behalf of EMQC Ltd)

8th May 2009

2. Detailed Assessment Findings against the standard

Criterion 1: Customer Insight

1.1 Customer identification

The Company has developed an in-depth understanding of its customers and potential customers. The planning of service delivery is based on up-to-date demographic information on rural and urban neighbourhoods; on age disability and other factors and on the different types of housing that you manage. Customer insight is developed from individual customer profiles that you hold; from the feedback that you gather from surveys, meetings and other consultation; and through customer participation in TRAs, mystery shopping, annual conference, the A1 Hundred customer panel and other events. You seek to understand the needs of harder to reach and disadvantaged groups where customer insight leads to service improvements, by extending choice in service access, in improving information and in meeting the communication needs of individuals. Your understanding of the needs of areas of multiple deprivation has led to the appointment of a Community Development Officer and the promotion of 'action' weeks in these neighbourhoods.

1.2 Engagement and consultation

The Tenant Empowerment Strategy details your commitment to consulting and engaging with customers; you use a range of consultation tools and you involve customers in different ways in order to make improvements and develop services that meet their needs. The 'Be A Part of A1 Housing' booklet tells customers how they can become involved. You review and improve the ways in which you consult and engage with customers. Customer involvement is central to the way in which The Company works, for example in making improvements to the repairs service, in developing a Handy Person service and in the funding of TRA applications for improvements.

1.3 Customer satisfaction

You undertake extensive measurement of customer satisfaction for all main areas of service. You include questions relating to key drivers of satisfaction and other questions pertinent to individual services. Analysis of results appears sound and you report on these quarterly; they are considered by customers and officers within the Customer Care Champions Group, so that lessons can be learned; and you publicise results through the Customer Insight Report, through In Touch, on posters and on the website

Partial compliance

Element 1.3.4

You do not set challenging and stretching targets for all the main areas of service.

Element 1.3.5

Despite collecting a wide range of customer views on your services, your analysis of the customer experience remains limited.

Areas for development

- You have done much useful profiling of customer groups, but there is scope for developing this further, so that you can improve the responsiveness of services to

- the particular needs and preferences of all customers, especially those who are disadvantaged or harder to reach. (1.1.1 & 1.1.3)
- Engagement and consultation activity takes place within a clear strategic framework; you update and improve the ways in which you do this, but you might consider whether this would be enhanced through more focused review of consultation and engagement strategies and perhaps a clearer annual schedule. (1.2.3)
 - You achieve a commendable return rate for most surveys, but where these are low, for example for antisocial behaviour procedures, you might consider additional ways of measuring satisfaction, so as to ensure reliability in the results. (1.3.1)
 - Many of your results show high satisfaction with services, though other results are not as good. In consultation with customers, you could use these results to set specific targets for satisfaction; this would help to achieve improvement where most needed, whilst continuing to challenge you in other areas. The setting of stretching targets would assist with the measurement of year-on-year improvement. (1.3.4)
 - There is scope to develop new ways of measuring the customer experience. You do ask questions relating to this, but you might now look with customers at the specific ways they interact with your services, the customer journey. Current survey results do not show adequately the difficulties customers sometimes have with accessing services and the unnecessary contact they have with your staff. (1.3.5)

Criterion 2: The Culture of the Organisation

2.1 Leadership, policy and culture

The Company's mission and values statements show a commitment to putting the customer at the heart of service delivery. Tenant involvement is central to the development of policy and strategy; your customers sit on the Board, the Joint Housing Advisory Group, the Customer Care Champions Group and on other bodies. Key documents, such as the Access and Customer Care Strategy, the Tenants Handbook and your Service Standards, all make it clear that customers should expect excellent levels of service. You have introduced profiling into customer consultation, along the lines of age, ethnicity and disability, so you can test the fairness of your interaction with customers. Equality and diversity policies, together with the training that staff receive in this area, help to ensure that all customer groups are treated fairly. The new Choice Based Lettings policy is a further example of how you are promoting fairness. Policies ensure that the privacy of individuals and information held about them is protected; you tell people about this both in service standards and in the How We Use Personal Information booklet. Staff training and working practices also show how you promote a customer-focused culture throughout The Company.

2.2 Staff professionalism and attitude

Customer feedback and the reality checking processes of mystery shopping confirm that staff are polite and friendly towards customers; this was confirmed for me by those customers with whom I spoke and by my own observations. The views of staff are listened to and their frontline experience of dealing with customers enables them to contribute to improvements in the ways services are delivered; a new procedure for dealing with antisocial behaviour is one example of staff involvement in service development. Those staff with whom I spoke told me they feel valued within the organisation; newly recruited staff have individual meetings with the Managing Director,

who gives a clear message about The Company's focus on customers. The contribution staff make is further recognised through the A1 Awards ceremony.

Partial compliance

Element 2.2.1

Recruitment, training and development policies for staff do not sufficiently demonstrate your commitment to delivering customer focused services.

Element 2.2.3

There is insufficient priority given to customer focus within your assessment of staff performance.

Areas for development

- Customer feedback appears to suggest that they feel they are treated fairly, but you might get a clearer view of this through more specific questioning. (2.1.4)
- A programme for customer care training does not appear to be in place, with the result that this is not provided for all staff and in all parts of the organisation. (2.2.1)
- When job descriptions and person specifications are next reviewed, you might check to ensure that there is sufficient focus on customer service within them; this aspect appears lacking in some, including posts with frontline customer contact. (2.2.1)
- Again there is scope for looking further at the competences within staff appraisal, to see whether a greater focus on customer service should be included. (2.2.3)

Criterion 3: Information & Access

3.1 Range of information

You provide extensive information on all aspects of your services, making this available to both current and potential customers. This includes details of how and when people can contact you; the names, photographs and responsibilities of senior staff; and details of charges where these are applicable.

3.2 Quality of information

You provide this information in a wide variety of ways, in booklets and leaflets, through the In Touch paper, through DVDs, on the website and in person through individual members of staff or in meetings. There are induction loops in all offices and you provide Minicom, Language Line and large print services so that you can communicate more easily with people with additional needs. You give guidance to staff on clear and effective communication, providing many with Plain English training. Staff are also issued with pocket guides, which help to ensure they provide correct information at all times. Publications that have been checked by customers carry the Easy Reading Group Approved logo. Information appears to be accurate and complete and you demonstrate that you take action to rectify any errors that occur.

3.3 Access

Customers can choose to contact you in a wide variety of ways. You measure the use they make of different access channels, including personal visit, telephone and the website and you have used such information to improve services, for example by closing the Harworth office and developing mobile surgeries to enable easier access for

customers. You have recently opened a new office within the Retford one-stop-shop and you ensure that this and your other public access points are well maintained, clean and comfortable.

3.4 Co-operative working with other providers, partners and communities

The Company works successfully in partnership with others, principally with Bassetlaw District Council, whose housing stock and services you manage. You also work in partnership with fire, police and health services, with TRAs and community forums, with building contractors, with voluntary organisations such as CAB and the Manton Community Alliance. These working arrangements are underpinned by service level agreements and other protocols. There are clear lines of accountability in particular with county and district councils working with you within the Worksop and Retford one-stop-shops. Beyond your formal partnerships, The Company and its staff contribute in many ways to the wider community, for example through the Focus on Young People in Bassetlaw, through the A1 Housing Community Awards, through opportunities offered by the new Training Academy, through your involvement in the Manton Gala, in funding for a local hospice and in other charitable initiatives.

The Company is compliant across all elements of this criterion

Area for development

- You might find it helpful to have a schedule for reviewing leaflets and other publicity materials. (3.2.3)
- Joint working arrangements appear to have clear lines of accountability built into them, but this was not the experience of some of the Decent Homes customers with whom I spoke. (3.4.2)

Criterion 4: Delivery

4.1 Delivery standards

You have challenging standards in place for repairs, gas servicing, adaptations, anti-social behaviour, leaseholding and other main areas of service. These are reviewed with the involvement of A1 Hundred Club customers and at the annual Tenant Consultation Event; such review has led for example to the raising of repairs and complaints targets. All standards and performance targets are continually monitored, using a variety of methods and you publicise this performance on posters, the website, in the In Touch paper and to the Board and to TRAs. Customers have chosen the six key indicators most important to them and you give prominence to these in your feedback. Performance is generally strong: you demonstrate consistent improvement over time with considerable top quartile achievement.

4.2 Achieved delivery and outcomes

Your service standards, the Decent Homes booklet and other publications make it clear what customers should expect from the services you provide. The responses to follow-up surveys and other feedback show that you deliver the service you promised to individual customers and that outcomes are positive for the majority. Benchmarking of service delivery and outcomes takes place through Housemark and in other ways. 2007-2008 Housemark figures show a 50% improvement over the previous year compared with other organisations. You have used benchmarking information to review

your targets, for example in making repairs targets more challenging and helping you to move into the top performance quartile. You seek to learn from the best practice of others, publishing a 'Learning From...' webpage which promotes the positive practice you have gathered from other ALMO inspections.

4.3 Deal effectively with problems

Amongst published performance data, you include any significant dips in performance, such as the recent failure to meet rent arrears targets; you explain such dips to customers, together with action you are taking in order to improve. You make it easy for customers to complain about any areas of poor service. Your procedures enable people to complain through channels of their choice; you publish your commitment to resolving things within clear timescales. You have provided staff with guidance and training so that all customer dissatisfaction can be dealt with effectively. The development of the Customer Care Champions Groups, at which complaints are discussed and analysed, is a good development. The Company's complaints procedures were reviewed in 2008.

Partial compliance

Element 4.3.4

You show that you learn from formal complaints, but there is at present insufficient collation and analysis of the much wider range of informal complaints and comments that customers make.

Element 4.3.6

A satisfaction survey is sent to all complainants, but this is not sufficient to ensure that the outcomes of the complaints process for customers whose complaint is upheld are satisfactory for them.

Areas for development

- Complaints are well handled and there is good analysis of these. However, more could be done to collate the wider range of 'informal' complaints and other expressions of dissatisfaction that customers make, so that any recurring issues can be identified, lessons learned and improvements made. As with formal complaints, you could then publicise some of the actions you have taken. (4.3.4)
- Where The Company has been at fault, a better service might be provided to complainants if direct (maybe personal) contact were made with them in order to ensure their satisfaction with the outcome. Such a proposal was in fact put to a recent meeting of the Customer Care Champions Group. (4.3.6)

Criterion 5: Timeliness & Quality of Service

5.1 Standards for timeliness and quality

You have standards and targets in place for the timeliness of response to customer contact for phone calls, letters, e-communications and personal callers; these standards are all measurable. You also set standards for the quality of your response to customers and include your commitment to treating them with courtesy; offering confidentiality; providing clear information; and listening to and learning from them. These and other commitments you make are supported through the training that you give to staff.

5.2 Timely outcomes

You tell people about your promises on timeliness and on the quality of customer service through the Service Standards booklet, the Customer Services booklet, the Customer Guide to the Housing Repairs Service and on the website. You respond promptly to initial enquiries. Customer needs are identified at the first point of contact and you are generally able to ensure an appropriate person is able to deal with the reason for contact. Where services cannot be completed at the point of contact, you tell the customer the next steps and where possible the overall timescale. The repairs service has a procedure for Part Complete Works whereby explanation is given to customers and new arrangements made as needed. The Company has clear protocols for sharing customer information, for example between 'back' and 'front' offices for repairs services, thereby reducing unnecessary customer contact

5.3 Achieved timely delivery

Performance against standards for timeliness and the quality of customer service is monitored through automated systems, by survey and other customer feedback and through the reality checking of mystery shopping. The results of this monitoring is reported upon internally and considered also by the Customer Care Champions Group.

Partial compliance

Element 5.3.2

The Company's performance against standards for timeliness and quality of customer service is not being met at a sufficiently high level.

Element 5.3.3

You do not at present benchmark your performance in relation to timeliness and quality of customer service.

Areas for development

- Staff do well in responding promptly to customers, identifying needs and getting the right person to deal with them; in all of this they seek to minimise avoidable contact. However they are working with CRM and telephony systems that need improvement if customer information is to be shared promptly and the need for transferred calls reduced. You have plans to upgrade these systems; in the meantime staff are to be commended for the quality of their response to customers. (5.2.2 & 5.2.3)
- Despite some good performance against standards for timeliness and quality of service, there are also inconsistencies, apparent within some of your published results and confirmed for me also by customers with whom I spoke. The 90% telephone response within 10 seconds may indeed reflect the performance of staff, but it is not the experience of customers who have been linked via The Council's telephone system. When reviewing how to improve performance, you might consider how to evaluate the journey and experience of customers as they interact with your services. (5.3.2)
- You undertake some useful benchmarking with similar organisations, but this does not relate to your performance against standards of timeliness and the quality of customer service. Such comparison may not be easy to arrange and you will need to consider how best to do this, whether with other ALMOs, with other holders of the CSE standard or internally within The Company or with The Council. (5.3.3)

Appendix A – Compliance Framework

Criterion	Sub-Criterion	Element	Non Compliant	Partial Compliance	Compliant	Compliance Plus
1	1.1	1.1.1			X	
		1.1.2			X	
		1.1.3			X	
	1.2	1.2.1			X	
		1.2.2			X	
		1.2.3			X	
	1.3	1.3.1			X	
		1.3.2			X	
		1.3.3			X	
		1.3.4		X		
		1.3.5		X		

Criterion	Sub-Criterion	Element	Non Compliant	Partial Compliance	Compliant	Compliance Plus
2	2.1	2.1.1			X	
		2.1.2			X	
		2.1.3			X	
		2.1.4			X	
		2.1.5			X	
		2.1.6			X	
	2.2	2.2.1		X		
		2.2.2			X	
		2.2.3		X		
		2.2.4			X	
		2.2.5			X	

Criterion	Sub-Criterion	Element	Non Compliant	Partial Compliance	Compliant	Compliance Plus
3	3.1	3.1.1			X	
		3.1.2			X	
	3.2	3.2.1			X	
		3.2.2			X	
		3.2.3			X	
		3.2.4			X	
	3.3	3.3.1			X	
		3.3.2			X	
		3.3.3			X	
	3.4	3.4.1			X	
		3.4.2			X	
		3.4.3			X	

Criterion	Sub-Criterion	Element	Non Compliant	Partial Compliance	Compliant	Compliance Plus	
4	4.1	4.1.1			X		
		4.1.2			X		
		4.1.3			X		
	4.2	4.2.1				X	
		4.2.2				X	
		4.2.3				X	
		4.2.4				X	
	4.3	4.3.1				X	
		4.3.2				X	
		4.3.3				X	
		4.3.4			X		
		4.3.5				X	
		4.3.6			X		

Criterion	Sub-Criterion	Element	Non Compliant	Partial Compliance	Compliant	Compliance Plus	
5	5.1	5.1.1			X		
		5.1.2			X		
	5.2	5.2.1				X	
		5.2.2				X	
		5.2.3				X	
		5.2.4				X	
		5.2.5				X	
	5.3.	5.3.1				X	
		5.3.2			X		
		5.3.3			X		