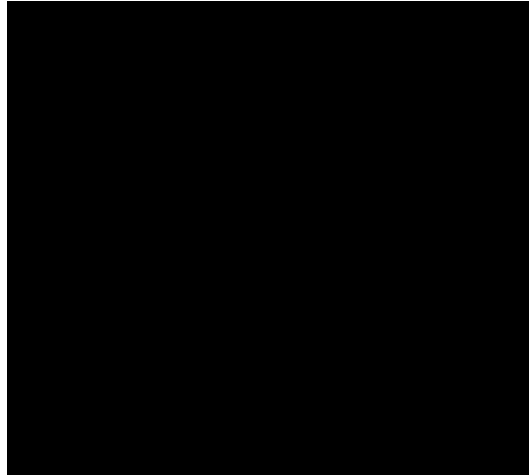


Commercial in Confidence

Customer Service Excellence



Date: 12th and 13th November 2014

Organisation	Pickering and Ferens Homes
Certificate Number	13/3173
Date of next Surveillance	13.11.15
Duration of next Surveillance	1.25
Legal Status	Private

Assessment Report

Andrew Mackey
Assessor

On behalf of the Centre for Assessment Ltd

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Introduction

Pickering and Ferens is an independent housing association providing independent living for older people in Hull and the East Riding of Yorkshire. The organisation has over 1200 properties which include a range of sizes and options and also include both sheltered and mainstream options. It has always had a clear focus on the needs and expectations of its residents. This focus on customers has been validated through a range of external assessments and accreditations, including accreditation against the Customer Service Excellence standard since 2005.

A new Chief Executive was appointed in February 2013 and she has implemented a number of processes to review what the organisation does, how it is structured and how it might achieve greater performance for its customers. Staff are very much on board with the need for review and for change in some areas and are generally motivated and excited by it.

Executive Summary

It was clear from the evidence collected that the organisation continues to meet the requirements of the standard and the recommendation is therefore that the accreditation be approved for a further 3 year period (subject to satisfactory surveillance each year). Although the scheme allows for up to 11 partial compliances, Pickering and Ferens have none and the organisation is fully compliant across all 57 elements. (At the last full assessment in 2011 there were 3 partial compliances).

This is a great achievement for the organisation and one of which the staff should be proud. Achieving this while the organisation is going through such significant change is especially significant. It was clear that working with the CSE standard has had an impact and continues to do so – for example through providing a structure for the organisation to review its customer base and what it knows about them. This has led to a much greater and deeper understanding of the needs and expectations of customers and allowed the organisation to focus more clearly on meeting those needs.

A number of areas of particular strength were identified which are summarised below:

- Staff at all levels are clearly passionate about what they do. This came out clearly in the individual interviews with staff and through observation. Staff are keen to talk about what they do, and several were able to provide clear examples of how they go above and beyond what would normally be expected in order to serve their customers well.
- Although some staff were unsure about the specific changes that are being planned and implemented, almost all staff were very positive about the need for change within the organisation and the potential benefits that such change can bring for their customers.
- The cultural shift that is being implemented is well-understood and well-received by staff. The organisation is managing to develop a much-needed commercial approach, without losing its traditional approach to caring for its customers, its staff and the wider communities it serves. Staff understand that this is important if the organisation is to continue to thrive and to respond effectively to changing market conditions going forward.
- As an organisation, Pickering and Ferens seems to welcome constructive feedback and is willing to learn from external inputs where appropriate. Identifying areas for further development is seen as a positive, providing opportunities to learn, develop and improve.

Inevitably, some areas were identified where further development might be beneficial and these are summarised below.

- A new Customer Support Team has been established to act as the first point of contact for customers. The aim is to improve efficiency, increase the proportion of issues which are resolved at the first point of contact and to provide a smoother and more effective service for customers. This means that staff need to be knowledgeable about a wide range of issues, enabling them to deal with low level queries without the need to refer on. It seems that in many ways staff are learning 'on the job' which means they often need to check with colleagues or with other departments before giving the customer a definitive response. Learning from other organisations that have adopted this model (especially Local Authorities where staff have to deal with a wide range of queries) could be helpful. In particular:
 - Developing a structured training programme for staff, maybe taking specific service areas one by one
 - Using FAQ (frequently asked questions) to help staff respond effectively and consistently
 - Exploring the use of algorithms where appropriate to help guide staff through a structured approach to decision making
 - Providing structured training for all staff in the use of the Kypera system to make sure everyone, including customers, is getting the maximum benefit from its use
- Greater clarity could be developed in the way that success is measured in some areas – for example, it was unclear what proportion of queries are now resolved at the first point of contact and whether the introduction of the Customer Service Team has improved this. Once measures have been clarified, clear targets should be agreed, giving staff, and the organisation as a whole, a clear focus and a yardstick by which to measure achievement.
- Explore staff feelings about current resource levels and how recent changes and developments have impacted. For example, while staff are really positive about the increase in training opportunities and in consultation processes, these can have a negative impact too, taking staff away from service delivery. (One staff member said that 11 colleagues had recently been on a 2 day training course – that means 22 staff days lost, the equivalent of losing one member of staff for a month.
- Consider how the concept of the internal customer might be more effectively developed and shared across the organisation. It seems that it is clear in some parts of the organisation but not in others.
- Consider how decision-making across the organisation could become more focussed on the needs and expectations of its customers. One model, developed by another client organisation, which might help is described below:

When any decision is made in the organisation, consider firstly 'does this have a negative impact on our customers? If 'yes', reconsider the decision

Once the impact on customers has been assessed, consider whether the decision will impact negatively on the teams providing services for customers – if 'yes', again look at whether these impacts could be avoided or mitigated

Finally, consider whether the decision has a negative impact on individual staff – it may be that these negative impacts can't be avoided, but they can be recognised and acknowledged

Adopting this type of model might be helpful in demonstrating that Trustees and Senior Managers really do understand the customer base and the potential impacts that their decisions might have on customers and the services they receive.
- Ensure that the skills sets needed by Trustees are fully understood and that this understanding is used effectively to make sure the governance of the organisation continues to develop and grow to meet changing needs.

Specific impacts of working with the CSE standard

- CSE is seen as being especially relevant at this stage in the organisation's journey to become an exemplar organisation. It provides a framework to identify, measure and publicise good practice in the organisation
- It has made the organisation focus more clearly on what it knows about its customers' needs and expectations and how the services provided remain relevant to those needs and expectations.
- Having an external validation of the work that the organisation does has been helpful for staff morale and in reinforcing their sense of pride in the Pickering and Ferens.

Summary of findings against Customer Service Excellence

Criterion 1 - CUSTOMER INSIGHT

Work is currently being done to improve understanding of the customer base. A customer profiling exercise is being undertaken and data is now available for around 85% of customers. The project has included more work on customer segmentation to further progress understanding. There was a recognition that although the organisation knew a lot about its customers, this data wasn't consistent, available together in one place or used effectively to shape and develop services. New headline data is now emerging from this data collection exercise – for example, 66% of customers are female, 40% are over 80 years of age and 70% have mobility problems.

Resident involvement has always been important to Pickering and Ferens, with residents being involved at all levels of the organisation, including being represented on the Board of Trustees. A new resident involvement exercise is currently underway to help make sure that the processes and opportunities for involvement are appropriate and fit for purpose – at present residents can be involved through area forums, specific meetings, working groups and through involvement in producing the magazines and newsletters. Many take the opportunity to be involved, but the review hopes to identify ways to further extend the levels of involvement and engagement.

A current focus for the organisation is on developing resident sustainability. Pickering and Ferens want their residents to be long-term, and finding ways to maintain and sustain tenancies have become increasingly important. Ways are being sought to help people stay in their own homes for longer by providing the right physical environment in the first place and by making sure that appropriate support is available. A current focus is on tackling loneliness and isolation for residents; this has been recognised as a potential problem for some resident groups and the organisation has accepted a degree of responsibility for doing what it can to address this.

Criterion 2 - THE CULTURE OF THE ORGANISATION

Over the last two years the organisation has been undergoing a great deal of change and development. The Chief Executive retired and a new Chief Executive took up post in February 2013. This has stimulated a fresh approach in many areas. There is a clear aim now for Pickering and Ferens to become an exemplar landlord. Customer service has been made much clearer at all levels of the organisation and staff were able to describe how the need for customer service is made explicit to them – for example through explicit discussion in meetings, through the development of working groups and customer-focussed projects. The Chief Executive is very clear about what she wants from staff in relation to developing and delivering services that are focussed on the needs and expectations of customers. Staff are frequently being asked for their feedback, ideas and suggestions of ways to improve things for customers. Several staff commented that they are now expected to take much more ownership and responsibility for their area of work – and this is seen as being a really positive change.

For new starters to the organisation, the importance of customer service is raised clearly at interview and this is positively reinforced during the induction process. Staff are managed in ways that ensure the focus on customers is maintained – the Chief Executive is very clear about what she expects from her managers and how she expects them to promote and ensure continued good service to customers. More importantly, line managers actively promote and model the behaviours they wish to see in their staff – for example one staff member commented *'my manager will go out of his way to make sure that customers*

are kept happy. Managers are actively involved in reviewing and developing approaches – eg through the Service Development Group which looks at what customers need and how the organisation can best meet those needs. A workforce review is currently being undertaken which will look at the roles and structures that are in place across the business to help make sure that the right people are in the right roles in the right part of the organisation. Staff are positive about this, believing that this will result in a much more effective organisation for everyone.

Criterion 3 - INFORMATION AND ACCESS

The organisation makes information available to customers and potential customers in a number of ways including via the website, in leaflets, newsletters and notice boards. Information is also shared with customers in face to face meetings. Staff understand that some of the information they provide for customers might be difficult for them to fully understand and they make allowances for that – for example, in face to face meetings staff will judge whether information has been fully understood. Staff will summarise information and ask customers what they have understood from what has been said. Information is presented to customers in plain English and care is taken to make sure that technical, legal and financial information is fully explained. For example, rent statements have been revised to reflect the format of bank statements; this has been based on the fact that customers are used to seeing bank statements and are familiar with their format, so they will feel more comfortable with this format for their rent statements.

The methods used for information provision are under constant review to ensure that they continue to meet the needs and expectations of customers. The web site has been revised recently, with the involvement of staff and customers, to make it much more dynamic, appealing and fitting for today. A residents' portal is under development which will enable customers to access their account details, process payments and other information directly, instead of going through staff members. The use of social media is also increasing as the organisation recognises the changing nature of its customer base. People who are now coming into the 'older person' category have had very different life experiences than the previous generation and are more likely to be more at home with technology such as Facebook and Twitter, and Pickering and Ferens are trying to reflect this in their methods of communication.

Work with partners is already evident but more is being planned and developed. In particular, efforts are being made to integrate the work done by housing with that provided by health and social care providers. This is based on the belief that an integrated approach would provide a better use of limited resources in each sector, as well as providing much better services which will be more easily accessible to a wider range of customers.

Criterion 4 - DELIVERY

There is a definite move away from the sense that 'one size fits all' for older people. The organisation now provides services for people ranging from their 50s up to and beyond their 90s and their needs vary enormously. Even within these groups the organisation recognises that individual needs differ – there are people in their 80s who are very active (one has recently completed a charity walk across the Humber Bridge and back) while others in their 50s might have more challenging needs.

Clear service standards are set and customers are made aware of what they can expect from the organisation. This is done very early on in their relationship with the organisation, in welcome packs and residents' handbooks. These are reinforced where appropriate through notices on notice boards,

information in newsletters and magazines and in documents such as the Annual Report. Performance against the standards agreed is monitored and reported on a regular basis. Internally this is done through monthly, quarterly and annual reports and externally it is done through information on the website and in the Annual Report. Residents are actively involved in monitoring performance – for example there is a resident-led scrutiny committee and the Board of Trustees includes two resident trustees.

Inevitably, as in all organisations, things do go wrong and there are clear processes in place to make sure that these issues are identified and addressed properly. Staff are provided with training and guidance to help them spot when things are going wrong and in dealing effectively with customers who might be unhappy – whether they want to make a formal complaint or not. The complaints procedure has now been incorporated into the new Kypera system and includes a clear way to gain feedback from the complainant at the end of the process. Customers were consulted about the changes at each stage of the change process. As a result of feedback from customers and from staff, a further review is about to take place which will see the number of stages reduced.

Criterion 5 - TIMELINESS AND QUALITY OF SERVICE

Over recent years there has been an increased focus on the quality of what is provided and how the services will continue to meet the changing needs of long-standing residents. The service standards that are set include clear standards covering issues of both timeliness and quality and are communicated to customers in the same way (through the web site, welcome pack, leaflets and posters. Reporting mechanisms are also the same as for the general service standards.

Timeliness issues have been improved through the use of hand-held technology for staff who are based in the community. This has allowed the staff to log, report and deal with issues that they find, meaning that customers are provided with a much quicker and more responsive service. Other technological approaches are also being considered to help further improve the customer's experience. For example, the organisation often arranges day trips for residents, families and the wider community – the facility to pay for these trips on line is being developed to help speed the process and provide a more efficient service.

The current workforce review is aimed at identifying exactly what the organisation needs in terms of structure, staff and roles. This in turn should help make the organisation more focussed, more streamlined and more effective in developing and delivering high quality services for all its customers.

Scoring

- To achieve Customer Service Excellence an organisation may not have any non-compliances
- To achieve Customer Service Excellence organisations must demonstrate compliance with each of the criteria. To do so the organisation must achieve full compliance or compliance plus in at least 80% of the elements contained in each of the criteria
- The maximum number of partial compliances allowed within each criterion is shown in the table below

Criterion	Number of Elements	Maximum number of partial compliances	Actual number of partial compliances	Actual number of major compliance plus elements
1	11	2	0	0
2	11	2	0	0
3	12	2	0	0
4	13	3	0	0
5	10	2	0	0

Conclusions

Assessment

Having carried out the assessment process in accordance with the guidelines provided for assessors by the Cabinet Office the Assessor was satisfied beyond any doubt that Pickering and Ferens Homes meets the requirements of Customer Service Excellence. The Assessor recommends to the Panel that the organisation be recognised under the standard. On behalf of Centre for Assessment Ltd. the assessor would like to congratulate all the staff on their achievement.

Assessor Name: Andrew Mackey
Date of report: 15th November 2014