

# **Access and Customer Care Strategy**

## **2009 - 2012**

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

<b>STATUS</b> (Draft/Approved/Updated/Archived)	<b>REFERENCE</b>
<b>Approved</b>	<b>SOPHO458ST</b>

Important notice:  
Printed paper copies of this procedure are **uncontrolled**.  
The current version of this procedure is available on the SHG Intranet site

Version Number	Date Amended	Comments	Date Approved	Author	Approved by
V1	2.04.09	Approved	14.04.09 SHA 30.04.09 SCP	Jon Simmons	SHA and SCP Board
V2	21.09.09	Updated		Jon Simmons	

## Contents

<b>1.</b>	<b>Introduction</b>	<b>4</b>
<b>2.</b>	<b>Our mission and related strategies</b>	<b>4</b>
<b>2.1</b>	<b>Group mission statement</b>	<b>4</b>
<b>2.2</b>	<b>Related strategies</b>	<b>4</b>
<b>3.</b>	<b>Context</b>	<b>6</b>
<b>3.1</b>	<b>Regulatory Code and Guidance</b>	<b>6</b>
<b>3.2</b>	<b>New Regulatory Authority – Tenant Services Authority (TSA)</b>	<b>6</b>
<b>4.</b>	<b>Aims of the Strategy</b>	<b>6</b>
<b>5.</b>	<b>Our approach</b>	<b>7</b>
<b>5.1</b>	<b>Gap Analysis</b>	<b>7</b>
<b>5.2</b>	<b>Customer Audit</b>	<b>8</b>
<b>5.3</b>	<b>Resident Profiling</b>	<b>8</b>
<b>5.4</b>	<b>Stakeholder Consultation</b>	<b>8</b>
<b>5.5</b>	<b>Resident Consultation</b>	<b>9</b>
<b>5.6</b>	<b>STATUS Survey</b>	<b>9</b>
	<b>5.6.1 Signpost Housing Association</b>	<b>9</b>
	<b>5.6.2 Signpost Care Partnerships</b>	<b>10</b>
<b>5.7</b>	<b>Staff Consultation</b>	<b>10</b>
<b>6.</b>	<b>The Strategy 2009 - 2012</b>	<b>11</b>
<b>6.1</b>	<b>Corporate Culture and Governance</b>	<b>11</b>
	<b>6.1.1 What we already do</b>	<b>11</b>
	<b>6.1.2 What we plan to do</b>	<b>12</b>
	<b>6.1.3 Measures of Success</b>	<b>12</b>
	<b>6.1.4 Strategic Goals</b>	<b>12</b>
<b>6.2</b>	<b>Embedding a Customer Focus</b>	<b>12</b>
	<b>6.2.1 What we already do</b>	<b>12</b>

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

6.2.2	What we plan to do	13
6.2.3	Measures of Success	13
6.2.4	Strategic Goals	13
6.3	Access to services	13
6.3.1	What we already do	13
6.3.2	What we plan to do	14
6.3.3	Measures of Success	14
6.3.4	Strategic Goals	14
7.	Information	15
7.1.1	What we already do	15
7.1.2	What we plan to do	15
7.1.3	Measures of Success	15
7.1.4	Strategic Goals	16
8.	Complaints	16
8.1.1	6.5.1 What we already do	16
8.1.2	What we plan to do	16
8.1.3	Measures of Success	16
8.1.4	Strategic Goals	16
9.	Consultation and feedback mechanisms	17
9.1.1	What we already do	17
9.1.2	What we plan to do	17
9.1.3	Measures of Success	18
9.1.4	Strategic Goals	18
10.	Impact Assessment	18
11.	Action Plan	18

Status	Approved
Document reference	SOPHO458ST
Date document written/amended	21/09/09

## 1. Introduction

This strategy applies to Signpost Housing Association and Signpost Care Partnerships. Referred to as ‘the Associations’.

The purpose of this strategy is to improve the accessibility and standard of the service provided to customers.

This strategy reviews the Access and Customer Care initiatives undertaken to date and aims to link them together to ensure that a coordinated approach is taken to achieve future objectives and improvements.

The Strategy covers a three-year period and will be reviewed annually.

## 2. Our mission and related strategies

The Associations strive to achieve the Spectrum Group mission:

‘To be recognised and respected for providing quality homes and services. Empowering people, supporting active communities and building better futures’.

This strategy provides an overarching plan for how the Associations will deliver quality services and ensure the accessibility of services to all its customers.

### 2.1 Group mission statement

To be recognised and respected for providing quality homes and services.  
Empowering people, supporting active communities and building better futures.

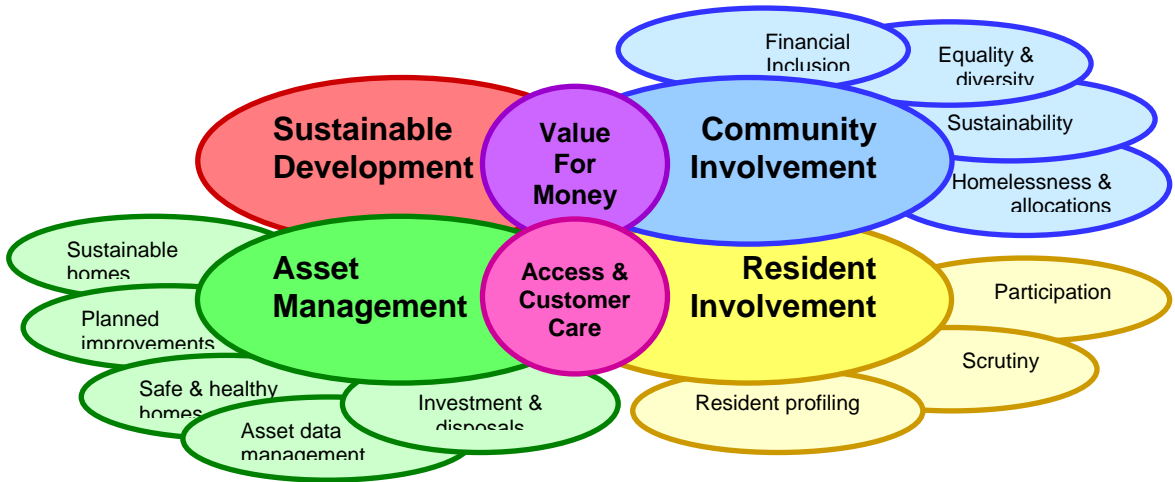
### 2.2 Related strategies

Signpost Housing Association has six interconnected operational strategies that deliver against each part of the Group’s mission:

- Sustainable Development Policy - Providing quality homes (developing)
- Asset Management Strategy - Providing quality homes (maintaining)
- Value For Money Strategy - Providing quality services (cost effective)

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

- Access and Customer Care Strategy - Providing quality services (accessibility and care)
- Resident Involvement Strategy - Empowering people
- Community Involvement Strategy - Supporting active communities and building better futures



Progress against our strategies is reviewed regularly and annual action plans are developed to address any remedial or improvement actions required, in accordance with our Continuous Improvement Policy.

This strategy supports the following Spectrum Housing Group Policies:

- Group Resident Involvement Policy
- Group Resident Consultation Policy
- Group Equality and Diversity Policy

This strategy supports and is inter-related with other key strategies for the Associations, including:

- Financial Inclusion
- Community Involvement
- Resident Involvement and Participation
- Value For Money

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

### **3. Context**

#### **3.1 Regulatory Code and Guidance**

Key Lines of Enquiry (KLOE) represent sets of questions and statements around either service or judgement specific issues which provide consistent criteria for assessing and measuring the effectiveness and efficiency of housing services.

The Audit Commission's KLOE on Access and Customer Care focuses on corporate culture and governance, access to services, information, complaints, consultation and feedback mechanisms.

The Audit Commission's expectations have been considered in developing this strategy, along with the recommended best practice which the Audit Commission publishes following their inspection of other housing associations.

#### **3.2 New Regulatory Authority – Tenant Services Authority (TSA)**

The TSA will be producing their new National Framework Standards towards the end of 2009. In order that this Strategy takes account of the new regulatory requirements, the strategy will be reviewed and updated in March 2010.

### **4. Aims of the Strategy**

The Associations are committed to providing excellent customer service which meet or exceed customers' needs by:

- ensuring that customers can easily access services provided by the Associations in the way that best suits them
- promoting a culture of continuous improvement in our staff in all areas of service delivery for the benefit of our customers
- benchmarking against other housing associations
- ensuring that the information provided is clear, relevant and useful
- training and developing staff so that they understand that excellent customer service is seen as an integral part of their work.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

- undertaking reviews of our service provision and developing action plans that will lead to improved customer service.

## 5. Our approach

This strategy is informed by the outcomes derived through several key activities. During 2008/09 the Associations have conducted research to establish who their customers are, what they think of us, what their expectations are and how they think we are performing.

In addition the Associations have conducted a client specific accessibility audit; a regulatory focused gap analysis and considered the outcomes from staff consultation.

A summary of this approach and the emerging themes is as follows:

### 5.1 Gap Analysis

A gap analysis was conducted in 2008 to identify how the Associations were performing in relation to the expectations set out in the Audit Commission KLOE.

This analysis identified several areas of strength and weakness in relation to the current service. The weaknesses identified highlighted several themes, which if addressed, could improve performance across several areas. The themes identified included:

- Updating the Associations' website
- Improving how telephone calls are dealt with
- Generating more customer focused performance information
- Analysing complaints in more detail
- Telling customers what we've done with their comments

These themes have been addressed in the strategy and specific actions have been developed to address each area.

The analysis conducted in 2008 also identified several areas of strength in the current service. These aspects of service have been highlighted in the strategy and will be built upon in developing our services into the future.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

## 5.2 Customer Audit

In January 2009, we conducted an audit of our services to assess how accessible they were to specific client groups. This audit focused on the needs of minority groups, but highlighted themes which were relevant when considering the accessibility needs of all customers.

The audit identified that overall those groups assessed had good access to the customer facing services provided by the Associations.

The customer facing policies and activities analysed included:

- Access to Housing
- Customer Care
- Estate Management
- Property Management
- Resident Involvement
- Tenancy Management

Where the audit highlighted differences or raised issues which needed further analysis these were addressed in an action plan.

## 5.3 Resident Profiling

The Associations have collected information on the profile of their Residents. This information is being used to tailor services to the specific needs of individuals.

This information tells us who our customers are and helps us to ensure that the services we provide are relevant and accessible. In 2008/09 we achieved a 65% resident profile. In 2009/10 we are aiming to achieve a 75% resident profile.

## 5.4 Stakeholder Consultation

Throughout 2008/09 a series of seminars and conferences were held with stakeholders to consult on performance and discuss objectives for 2009/10.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

The following events were held:

- |   |  |                  |
|---|--|------------------|
| ■ | Performance Seminar                    | 16 July 2008     |
| ■ | What our customers think of us Seminar | 23 October 2008  |
| ■ | Budgets, Business Plan and VFM Seminar | 27 November 2008 |
| ■ | Blandford Stakeholder Conference       | 3 December 2008  |
| ■ | Exeter Stakeholder Conference          | 28 January 2009  |
| ■ | Plymouth Stakeholder Conference        | 29 January 2009  |

## 5.5 Resident Consultation

A draft version of this strategy has been considered by the following resident consultative groups:

- West Area Residents' Committee
- Service Action Team
- West Area Residents Forum
- East Area Residents Forum

## 5.6 STATUS Survey

A STATUS survey was carried out in July 2008 and 14% (c.600) tenants were surveyed through this process. The themes which emerged were:

### 5.6.1 Signpost Housing Association

Compared with other similar sized organizations in the region Signpost Housing Association's (SHA) performance was close to average.

SHA's performance was close to average (+/- 3%) for satisfaction with landlord's services, quality of the neighborhood, quality of the home, condition of the property, value for money, tenant contact (ease of contacting the right person, helpfulness of staff, ability of staff to deal with problems and satisfaction after contacting the landlord), and the overall repairs service.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

SHA's performance was below average for satisfaction with keeping tenants informed and taking account of their views (both 5% below average).

Compared with the previous STATUS survey which was carried out in 2005, overall tenant satisfaction had risen dramatically and this was reflected in the overall rating for landlord services (84%) which was 12% higher than in 2005 (72%).

### 5.6.2 Signpost Care Partnerships

For Signpost Care Partnerships, the survey results suggested strongly that SCP is providing a good housing and support service.

Overall 84% of tenants were satisfied with the landlord services (higher than general needs tenants at Signpost HA). Tenants awarded ratings for the helpfulness of staff (83%), ability of staff to deal with enquiries (82%), value for money (84%), quality of the home (87%), quality of the neighborhood (90%), the repairs service (86%) and being kept informed (80%). Supported tenants were satisfied with the care and support packages, with the majority highly satisfied with their support worker (86%) and the overall support services (88%).

Compared with the previous STATUS survey, several areas of service had received improved satisfaction ratings.

However, SCP's performance when dealing with customer contact was disappointing, with 25% of tenants reporting that they found it difficult to contact staff and 22% reporting that they were left dissatisfied with the outcome.

### 5.7 Staff Consultation

In formulating the strategy it was also important to involve staff to help ensure that work planned for the future was realistic and achievable. Discussion took place with:

- Extended Management Team 4 March 2009
- Operations Management Team 23 March 2009
- Frontline staff who provide access and customer care

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

## 6. The Strategy 2009 - 2012

In formulating the strategy the Associations' have reviewed the service provided in line with the Audit Commissions areas of focus. These being:

- Corporate Culture and Governance
- Embedding a Customer Focus
- Access to Services
- Information
- Complaints
- Consultation and Feedback Mechanisms

In each case the Associations have considered existing practice and developed plans based on the feedback received through the activities highlighted in Section 5.

### 6.1 Corporate Culture and Governance

#### 6.1.1 What we already do

The Associations engage with residents and stakeholders in setting priorities and objectives through an annual program of seminars and conferences. Objectives are agreed by Boards and disseminated through directors and senior managers.

The annual 'What our customers think of us' seminar provides board members, residents and stakeholders feedback on performance against targets; and consults on standards.

The Board review performance against common standards and receive quarterly reports on customer facing performance indicators.

A service action team (SAT) consisting of 2 board members, 2 residents and senior managers, meets quarterly to review customer facing issues and review performance information.

The Customer Care Charter is developed and reviewed annually in consultation with residents, board members, stakeholders and staff.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

### 6.1.2 What we plan to do

The Associations plan to revise the Customer Care Charter and through it publicise clear and challenging targets to customers and staff. Importantly, we plan to ensure that the targets agreed in the Charter are specific and measurable. Targets and standards also need to be updated to reflect new forms of popular communication, like on-line services and text messaging. We plan to report the Associations' performance in achieving these targets to residents and board Members on a quarterly basis.

We plan to continue delivering a programme of seminars to residents, board members, stakeholders and staff. Seminars will be delivered to inform and consult on topical issues and to assist with the planning of actions to address the key issues facing the Associations.

### 6.1.3 Measures of Success

- To develop a clear set of service standards across the range of services provided by the Association
- To deliver conferences and seminars to residents, board members, stakeholders and staff to discuss the key issues facing the Associations.

### 6.1.4 Strategic Goals

- Measurable and challenging service standards agreed and in place by December 2009
- Seminars held on Budgets Business Plan and Value for Money, EDI, Environmental Issues, Resident Satisfaction and Performance by December 2009.

## 6.2 Embedding a Customer Focus

### 6.2.1 What we already do

A commitment to high levels of customer care is driven by example. Senior managers maintain a clear customer focus through their involvement with residents in the planning and reviewing of annual budgets and objectives.

Staff awards recognise officer achievement in exceeding standards and

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

delivering high levels of customer care.

A weekly staff briefing note and bi-monthly listening lunches contribute to and reinforce the development of a customer focused culture.

Mandatory corporate customer care training challenges all employees to deliver high levels of customer care and informs employees of targets and standards.

Annual Employee Performance Development Reviews and regular work reviews promote the achievement of customer service objectives.

### **6.2.2 What we plan to do**

We plan to introduce an induction program to promote a more customer focused culture to new employees. Resident representatives will have a role to play in this induction programme.

We intend to carry out monthly briefing sessions for staff which will reinforce our customer focus.

### **6.2.3 Measures of Success**

- A new Induction programme for staff
- A routine programme of staff briefings in place including a weekly email briefing to all staff and smaller team briefings

### **6.2.4 Strategic Goals**

- Induction programme in place by December 2009
- 'What's going on' team briefings held for all teams by December 2009.

## **6.3 Access to services**

### **6.3.1 What we already do**

The Association employs an independent organisation, Quality Housing Services, to annually audit customer access and customer facing activities.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

The Associations were awarded QHS accreditation in November 2008.

We conduct an annual customer audit which identifies specific access related issues for minority groups.

The Associations have offices located in areas where residents live. We encourage residents to visit offices and offer appointments for our officers to visit residents in their homes.

### **6.3.2 What we plan to do**

The Associations plan to upgrade the website to offer customers the ability to carry out a greater number of transactions electronically, access additional information on-line and utilise improved electronic communication methods to benefit vulnerable Residents.

We will deliver the plan derived from the customer audit carried out in January 2009. As part of this plan, we aim to ensure that access to services from specific vulnerable groups, such as the elderly and those with learning difficulties is improved.

### **6.3.3 Measures of Success**

- A new Website in place with online services including the facility for Residents to view a rent statement, update personal information and track a repair order.
- A service which is accessible to vulnerable groups

### **6.3.4 Strategic Goals**

- A new website launched by 31 July 2009
- EDI Impact assessment shows an improvement in equality of access to services for all groups. Impact Assessment to be carried out by October 2009

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

## 7. Information

### 7.1.1 What we already do

The Associations have developed a Residents' guide, which is issued to all new Residents at sign-up. The guide provides information about the Associations, the services available, opportunities to participate, performance information, contact information, and relevant information on services provided by other organisations.

A selection of leaflets are available at offices, providing information on key policies and procedures.

The existing website provides basic information on the services available and provides access to key policies and procedures.

Information can be translated on request into different languages, and into Braille format.

### 7.1.2 What we plan to do

We intend to utilise the Signpost 101 to establish residents' information requirements. As part of this process we intend to ask residents to consider the benefits of signing up to the 'Crystal Mark' plain English standard.

Through developing the website, we plan to provide customers with clear information on the services provided by the Associations. We plan to provide information on a range of topics including how to diagnose a repair, where the Associations' stock is located, how to apply for housing, and general information on our policies and plans. We will also include this information in the appropriate languages, spoken in the communities where we work.

### 7.1.3 Measures of Success

- An awareness for the information needs of residents
- A new Website in place offering all stakeholders access to a range of up-to date information including information on complimentary services

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

#### 7.1.4 Strategic Goals

- Satisfaction with the information provided by the landlord increases by 5% by March 2010

## 8. Complaints

### 8.1.1 6.5.1 What we already do

Complaints' activity is analysed and patterns and trends are reported to Board annually. Information on complaints is publicised to residents and stakeholders through newsletters and at seminars.

The Customer Feedback Policy is reviewed annually with residents and amendments are approved by the Board.

### 8.1.2 What we plan to do

We plan to introduce a new system for recording complaints. The new system, Resolve, will introduce commonality in the recording of complaints activity with other social housing organisations, enabling an improved ability to benchmark and compare performance with other housing associations.

We plan to update the information we provide to Board on the complaints we hear at Stage 3 of the procedure.

### 8.1.3 Measures of Success

- A new system in place to record complaints and manage the process for dealing with complaints.
- A greater awareness for the issues which drive complaints reported to Board annually

### 8.1.4 Strategic Goals

- ReSolve Complaints Management System in place by July 2009
- Performance in responding to complaints within target to increase to 85%+ by March 2010.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

- Analysis of complaints to be reported to Board by November 2009.

## 9. Consultation and feedback mechanisms

### 9.1.1 What we already do

Resident forum and committee meetings discuss feedback on customer facing activities.

A Policy and Procedure Review Group considers improvements to standards of access and customer care through the review of key customer facing policies and procedures.

The Associations actively canvass views of customers and use these to review and improve services. An established system of surveys is in place. These surveys cover six key service areas.

These surveys are seen as a key management tool; trends in performance are monitored and used to identify service improvements.

All feedback is classified by age, ethnicity, and gender.

There is active measurement and reporting on the performance standards for responding to residents. A suite of performance indicators have been adopted which are reported on a quarterly basis to the Board. These include response times for telephone calls, letters and emails and satisfaction with complaint handling.

### 9.1.2 What we plan to do

We plan to regularly write to all stakeholders to inform them of what has happened with the feedback we have received from them through the various feedback mechanisms we have in place.

We also plan to update the process for gathering feedback from complainants and from those who have contacted the Associations. Historically, the return rates for such surveys have been low. By using new methods for gathering feedback such as text messaging and electronic surveying, we plan to increase the amount of feedback we collect in these areas.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>

### 9.1.3 Measures of Success

- Improved communication with Stakeholders
- Deliver a programme of consultation activities such as satisfaction surveys, service charge consultations, and service review focus groups

### 9.1.4 Strategic Goals

- A Stakeholder newsletter written in the form of 'You Said, We did' sent to all stakeholders by October 2009.
- Hold stakeholder conferences in Plymouth, Exeter, and Blandford to consult on Budgets and Business Plan issues by January 2010
- Carry out a customer satisfaction survey by September 2009

## 10. Impact Assessment

The strategy will be reviewed once every 3 years. An impact assessment will be carried out annually and the findings will be reported to Board.

Following the impact assessment, the Access and Customer Care Strategy Action Plan will be updated.

## 11. Action Plan

Attached is the Access and Customer Care Strategy Action Plan. This plan includes the actions identified through the development of this strategy.

Due to the cross-cutting nature of Access and Customer Care, many of the actions identified in this plan duplicate tasks already identified within other strategies.

<b>Status</b>	<b>Approved</b>
<b>Document reference</b>	<b>SOPHO458ST</b>
<b>Date document written/amended</b>	<b>21/09/09</b>