

Customer Involvement Impact Assessment 2009-10: Six Month Interim Assessment (April 2009 – September 2009)

1. Introduction

Customer Involvement is a central element of Places for People's approach to scrutinising and improving services. It is essential to evaluate the impact of involvement activities regularly to ensure they continue to be as effective as possible and to determine priorities for improvement.

The aims for involvement in 2009/10 are challenging and ambitious. A new CI Strategy has been launched which sets out how the organisation will build on the changes made to the structure last year by further expanding the ways people can get involved to bring in a wider range of customers, and giving them greater opportunities to influence services and scrutinise performance. A budget of £285k underlines the organisation's commitment to success in this area. An overview of the value for money delivered by the organisation's investment in involvement is included in this assessment, but full analysis will be carried out at the year end.

Notable achievements so far this year include the involvement of customers at all stages in a major piece of work to select contractors to deliver a 5 year maintenance programme worth £140 million. Elsewhere, there are many significant initiatives getting under way, but which are yet to come to full fruition as new structures are established.

2. Purpose of the Review

The mid-year review is in line with good practice and with our commitment to customers, providing us with an opportunity to measure progress to date and determine any additional actions needed over the next 6 months.

This is particularly important given the pace of change in the organisation, and the need to make timely adjustments to activity and activity measurement during October 2009 to March 2010 to achieve customer-driven priorities and targets.

The key objectives of the review are:

- to assess progress on priorities for 2009-2010 set out in the 2008-2009 CI Impact Assessment
- to measure the impact of the national, regional and local groups' activities during the period, together with Places for People initiatives, in delivering intended outcomes
- to set targets for the next 6 months

An annual review is a statutory requirement under TSA regulations, and the latest Impact Assessment is a mandatory document for submission as part of Short Notice Inspection by the Audit Commission.

3. Progress on Priorities 2009-2010

The table below summarises the progress made on the Key Priorities for 2009-2010 set out in the 2008-2009 CI Impact Assessment.

<p>Priority: Develop a new Customer Involvement Strategy that clearly sets out the organisation's aims for making customer involvement as effective as possible</p>
<p>Progress:</p> <ul style="list-style-type: none"> • Revised Customer Involvement Strategy produced, in consultation with customers • Clear aims identified, together with assessments of current position and priorities for action • New CI service standards set out exactly what customers can expect in terms of involvement opportunities, objectives, support, resources and feedback • Revised Customer Involvement Statement developed in consultation with a wide range of involved customers • CI Statement sets out clear commitments to customers and priorities for customer involvement <p>Targets October - March:</p> <ul style="list-style-type: none"> • Obtain CI Strategy approval & commence implementation • Implement new mechanism to monitor progress & achievement of strategic aims - CI Strategy Action Plan, to be overseen and driven by the Customer Involvement Manager and reviewed by National Customer Forum • Review the policy on customer expenses to ensure that appropriate support is provided and that the levels of support

available are promoted to all customers

Priority: Improve the structure of formal involvement by giving customer groups clearer focus and better opportunities to influence decision making

Progress:

- Revised involvement structure implemented, with distinct separation between policy development and performance management; and monitoring of the actual customer experience, allowing different groups of involved customers to bring a clearer focus to each
- Further enhancements to Customer Involvement structure developed in consultation with customers (including Customer Action Groups and Scrutiny Panel – see below)
- Customers involved in major procurement decisions for services affecting them, e.g. repairs contract
- Mystery shopping exercises commenced, testing front-line services and identifying opportunities for improvement
- Customer Inspection model identified through Metropolitan Housing Partnership / HQN consultants

Targets October – March:

- Establish a Customer Scrutiny Panel to make recommendations for service improvement and development
- Implement programme for Customer Inspectors, including recruitment, selection, training and accreditation
- Embed customer involvement into organisational procurement policy

Priority: Create customer action groups with a focus on the core services affecting customers

Progress:

- Development of new CI structure, which will now facilitate the establishment and development of the action groups
- Core services focus incorporated into key strategic documents including CI Strategy & CI Statement

Targets October – March:

- Establish service-specific Customer Action Groups, to be operational by year-end, to monitor performance and drive service improvements

- Agree with the groups clear terms of reference, wider customer priorities, intended outcomes and methods of measuring progress and achievements

Priority: Improve the effectiveness and value for money of involvement activities, including introducing appropriate benchmarking and tracking tools

Progress:

- Form assembly exercise introduced to capture a wide range of CI activities
- Exercise reviewed as part of 6 month review of CI Impact Assessment & limitations considered
- Joint working with Finance team to put in place improved coding and monitoring measures for 2010-2011 financial year
- Identified suitable software to facilitate impact assessment of CI activity across the organisation

Targets October – March:

- Introduce commercial software package and train staff in usage
- Ensure staff training and preparedness for improved coding in 2010 - 2011
- Explore opportunities to share positive practice with other organisations
- Benchmark involvement service using relevant Housemark module

Priority: Increase the capacity of customers to scrutinise and improve the organisation's performance

Progress:

- Enhanced CI structure, developed in consultation with customers, places improved focus on customers' scrutiny of services and performance

Targets October – March:

- Review the format, content and circulation of our customer information on performance
- Ensure customer training programmes appropriately reflect involved customers' performance management and scrutiny roles

4. Analysis of Customer Involvement Activities during 2009-2010

Limitations of Collected Data

Some limitations have been identified in the mechanism used to capture involvement data, in particular around determining staff costs and evaluating the impact of events. A specialist software solution is being sought to address these problems and improve the collection process generally.

Findings

Notwithstanding some limitations, the form assembly exercise has provided some useful indications as to the range and scope of CI activities being carried out in the different regions and functions of the business, from which we are able to draw conclusions and determine improvement actions required in the future.

The supplementary charts and numeric tables illustrate the findings, and a series of brief conclusions to accompany these is set out below.

Executive Summary of Conclusions

Type of Activity (Charts 1 & 2)

- Over half (58%) of local activity is based around tenancy and estate management, environmental improvements, service improvements and customer relations.
- Community involvement and social responsibility activities account for the next highest value locally (18%).
- Activities around procurement, income and asset management and diversity are relatively low at local level (8% in total).
- Local activities with clear links to policy and strategy development and planning are low (5%).
- Nationally / regionally, involvement in policy, strategy and service improvements is high (92% in total).
- Governance (4%) and income management (4%) make up the remainder of national / regional recorded activity.

Costs (Charts 3 & 4)

- Half of local activities show a relatively low cost (£1 to £100).
- Some 23% of recorded local activities were delivered at no cost to the organisation over and above the overheads of staff involved.
- 14% of local activities show costs of between £251 and £1000.
- A small number of local activities attracted external funding (2%).
- Nationally / regionally, the 2 main cost bands for recorded activities were between £1001 and £2500 (38%) and £51 to £100 (23%).
- 8% of national / regional costs recorded exceeded £2500, and the cost of 1 activity (8%) exceeded £5000.

Recorded Activity Levels (Charts 5, 6 and 7)

By Business Unit (Chart 5):

- There are wide differences in recorded activity levels, with East unit recording 62% of the overall activity total.
- Central unit recorded the lowest levels at 7%.

By Region: (Chart 6)

- These variations are further apparent in the comparative recorded activities by region. Over a third (35%) of recorded activity is in the North East (Northumbria) region. Lowest recorded levels are in the Central & South Lancs. (3%), Greater Manchester & Cheshire (3%), South & East Yorks. (Sheffield) (3%) and South West (2%).

By Company Function (Chart 7)

- Almost half of recorded activity (49%) took place in the Homes area of the Group, and over a third (35%) within Individual Support.

Intended & Actual Outcomes (Chart 8)

- In activities intended to improve skills, actual outcomes are perceived to have matched intended outcomes in all cases.
- In all other categories of activity, actuals fell short of intended outcomes.

Summary of Priorities

The following actions in response to these findings are incorporated into the Customer Involvement Strategy

- Promotion across all regions to achieve consistent levels of involvement activity
- Broadening of involvement approach to encompass all parts of the Places for People Group
- Development of frameworks to increase focus and clarity of purpose of involvement activities

5. Summary of Outcomes from Involvement

Outcomes from involvement activities are summarised below according to the service area to which they relate:

Activity	Outcomes	Scope	Cost of implementing outcomes (relative to area of scope)	Impact of implementing outcomes (within area of scope)
Repairs / Assets				
Maintenance Tendering Process (sub-group of National Customer Forum and National Customer Experience Panel)	Selection of contractor for £140 million maintenance contract, including site visits and contractor interview.	National	None (cost of service already budgeted for)	High
Income Management				
Income Collection Focus Group	Redesign of rent statements	National	None	Medium
	ICC Service Standards agreed	National	None	Medium
	Level of payment taking at sign up agreed	National	None	Medium
	Agreed how information given about	National	None	Low/Medium

	rent setting			
Neighbourhoods				
Consultations on green spaces projects				
- Highfields	Customers shaped green spaces project	Neighbourhood	Medium	Medium/High
- North Sherwood	Customers shaped green spaces project	Neighbourhood	Medium	Medium/High
- High Hazels	Customers shaped green spaces project	Neighbourhood	Medium	Medium/High
- Grangewood	Customers shaped green spaces project	Neighbourhood	Medium	Medium/High
- Imperial Road	Customers shaped green spaces project	Neighbourhood	Medium	Medium/High
- Tweed House	Customers shaped green spaces project	Neighbourhood	Medium	Medium/High
Customer Involvement & Access				
National Customer Liaison Panel	Restructure of customer involvement agreed	National	Low	Medium
Futures Group	Improved wording of standard complaints letter	National	None	Medium
Scheme Improvements				
'Hear our voice' residents' meeting	Customer selected furniture and electrical equipment to improve communal lounge area	Scheme	Low/Medium	Medium
IS Scheme Meetings	New radiator valve designs to be procured	Scheme	Low/Medium	Low/Medium
	Funding application approved for new patio area at front of scheme	Scheme	None	High
Homeowner Service Charge investigations	Clearer advice regarding make-up of service charges agreed	Scheme	None	Low

Residents' Meeting	Change to ground works contractor	Scheme	None	High
Truncliffe Parking Consultation	Customer input into parking improvement project	Scheme	Tbc	Low/Medium
Crown Gardens consultation	Customer input into garden design	Scheme	Low/Medium	Medium
IS Coffee Morning	Customers fed into design of communal tenants' room	Scheme	Medium	Medium
Support / Recruitment				
Richmond Court Resident's Group	Customer input into selection process for new SSO	Scheme	None	High

6. Areas for Further Improvement

The review has successfully identified a number of areas for further improvement over the remainder of the year and ongoing into 2010–2011. These have been incorporated into the recent revisions of the key strategic customer relations documents already referred to above, which set out in detail our current position and priorities for action.

An area for further improvement within the Impact Assessment process itself is the need to develop more comprehensive systems to objectively assess the impact of CI activities in relation to desired outcomes, in particular improved value-for-money in service delivery and improved equality of access to services.

The purchase of new software specific to this purpose will be instrumental in progress on this issue. However, improvement in this area is heavily dependent on adopting a more detailed focus across the organisation on CI expenditure and on expenditure related to service improvements resulting from CI activities.

Next Steps

The 2009-2010 CI Impact Assessment will be prepared during April/May 2010. As with the 2008-2009 Assessment, this will be a customer-facing document containing a full review of achievements over the year, reporting progress on previously-agreed objectives and targets and setting out priorities and targets for 2010-2011.

Appendix 1: Tables and Graphs

Local Activity Type	Number of Activities	%
VFM / Procurement / Income Mgmt	7	4
Tenancy & Estate Mgmt / Environ Improvmts	59	33
Stock Invest / Asset Mgmt	1	1
Service Improvements / Customer Relations	45	25
Policy & Strategy / Planning	8	5
Personal Dev & Wellbeing	6	3
Diversity / Equality of Access	6	3
Community Involvement / Social Resp	31	18
Capacity/Skills Building	14	8

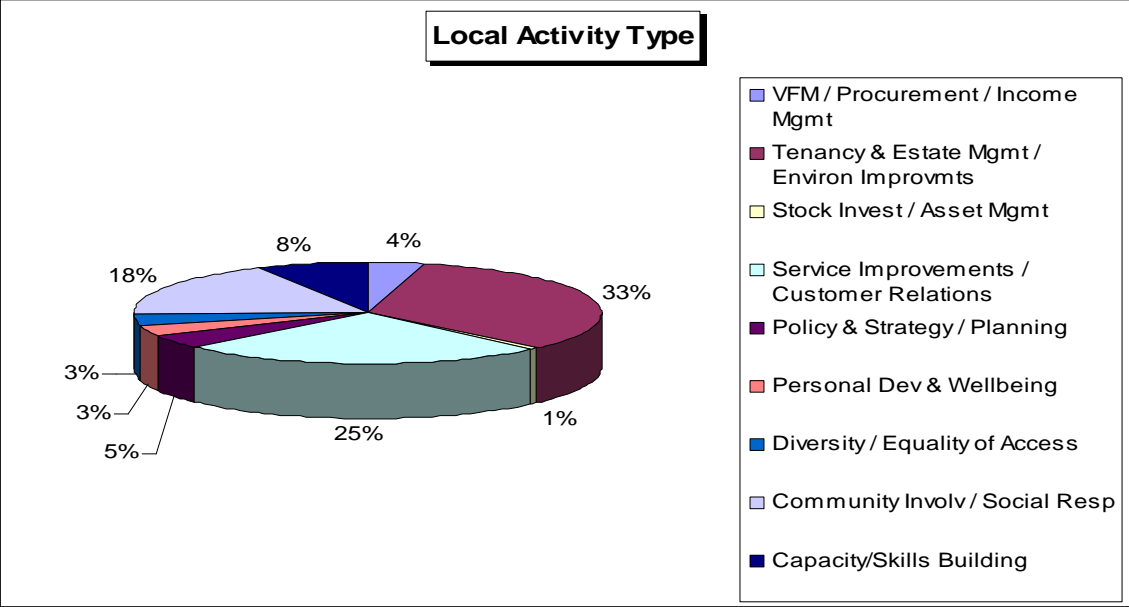


Table 2: National / Regional Activity Type

	Number of Activities	%
Governance	1	4
Income Management	1	4
Policy & Strategy / Planning	11	42
Service Improvements	13	50

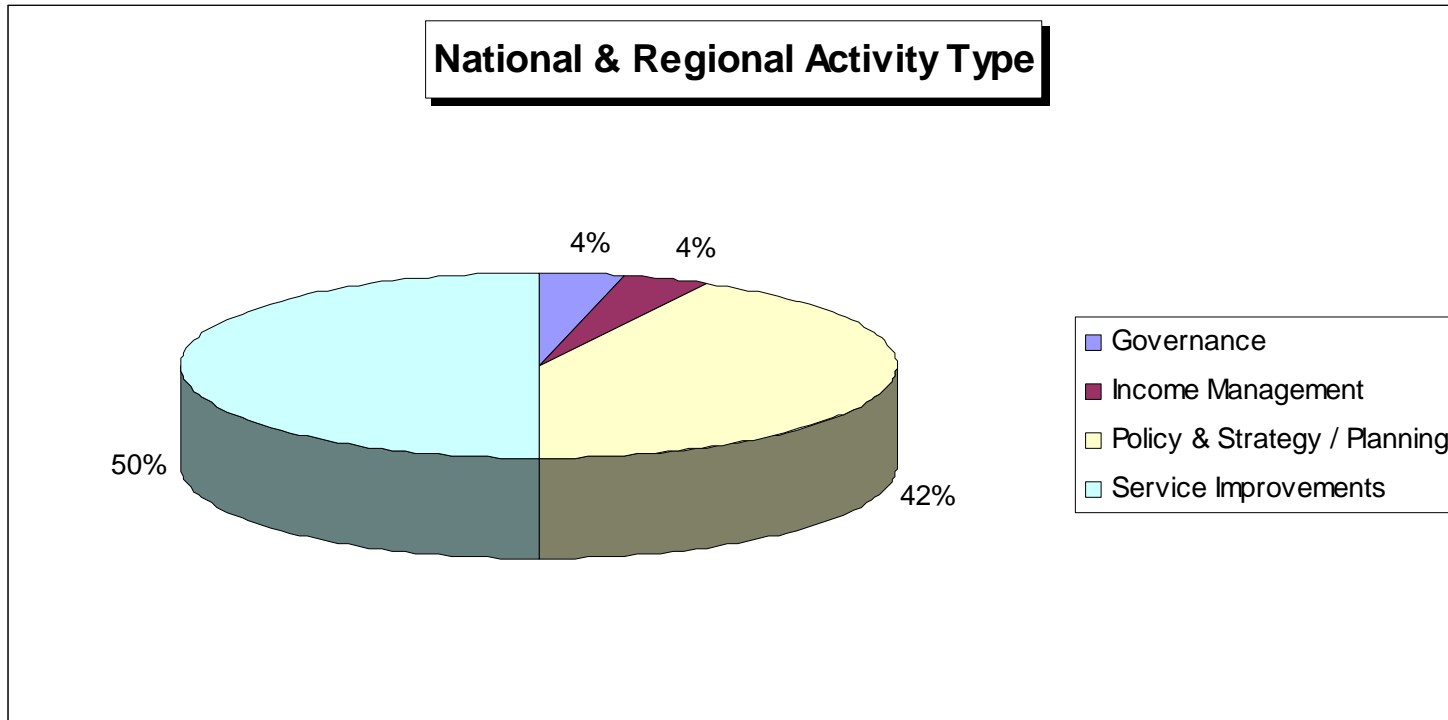


Table 3: Local Activities Costs	Number of Activities	%
Nil	41	23
£1 - £50	34	19
£51 - £100	57	31
£101 - £250	19	10
£251 - £500	13	7
£501 - £1000	13	7
£1001 - £2500	1	1
Externally Funded	3	2

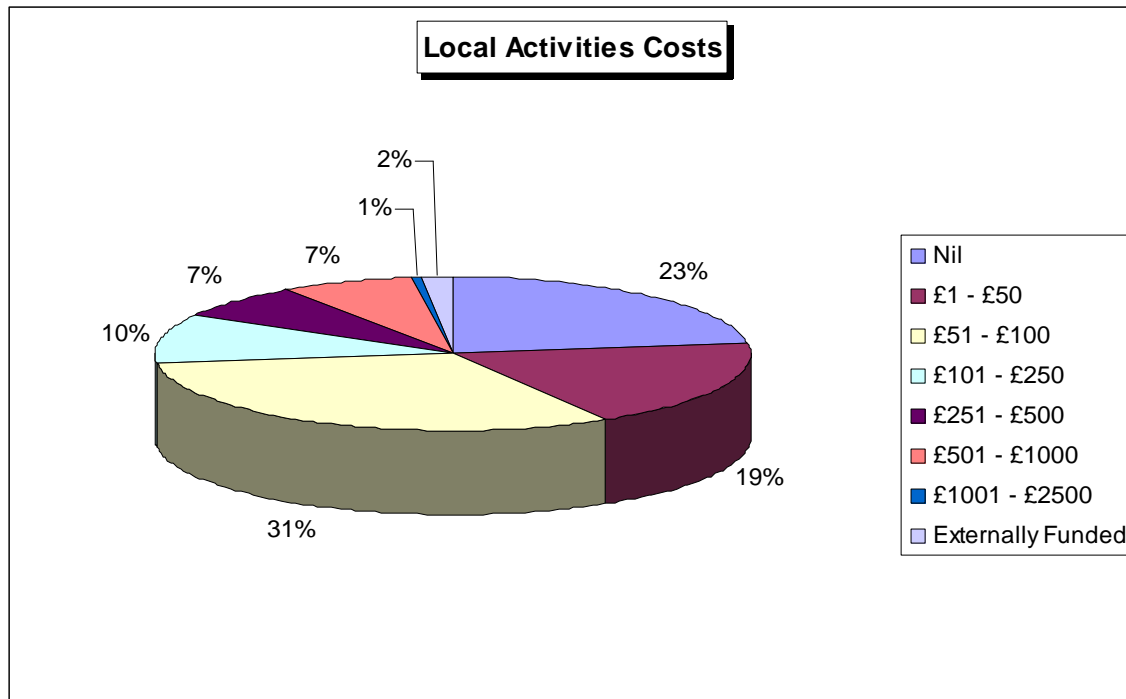


Table 4: National / Regional Activities Costs

	Number of Activities	%
£51 - £100	3	23
£101 - £250	2	15
£501 - £1000	1	8
£1001 - £2500	5	38
£2501 - £5000	1	8
£5000+	1	8

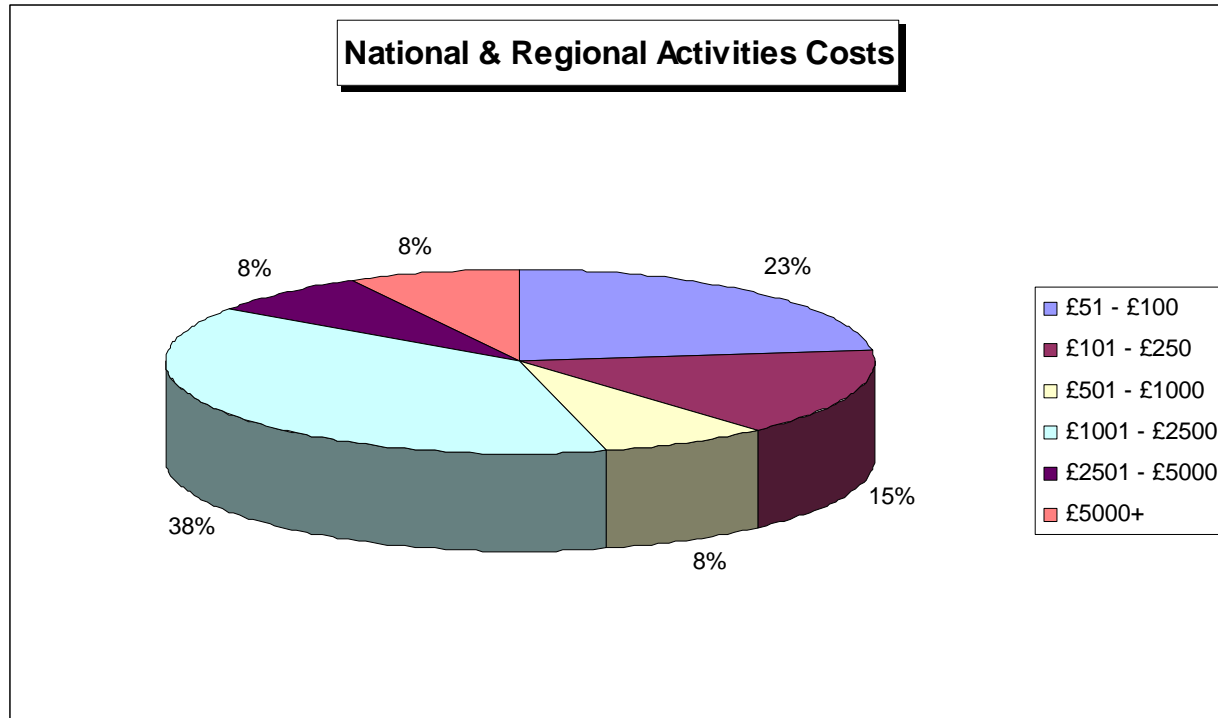
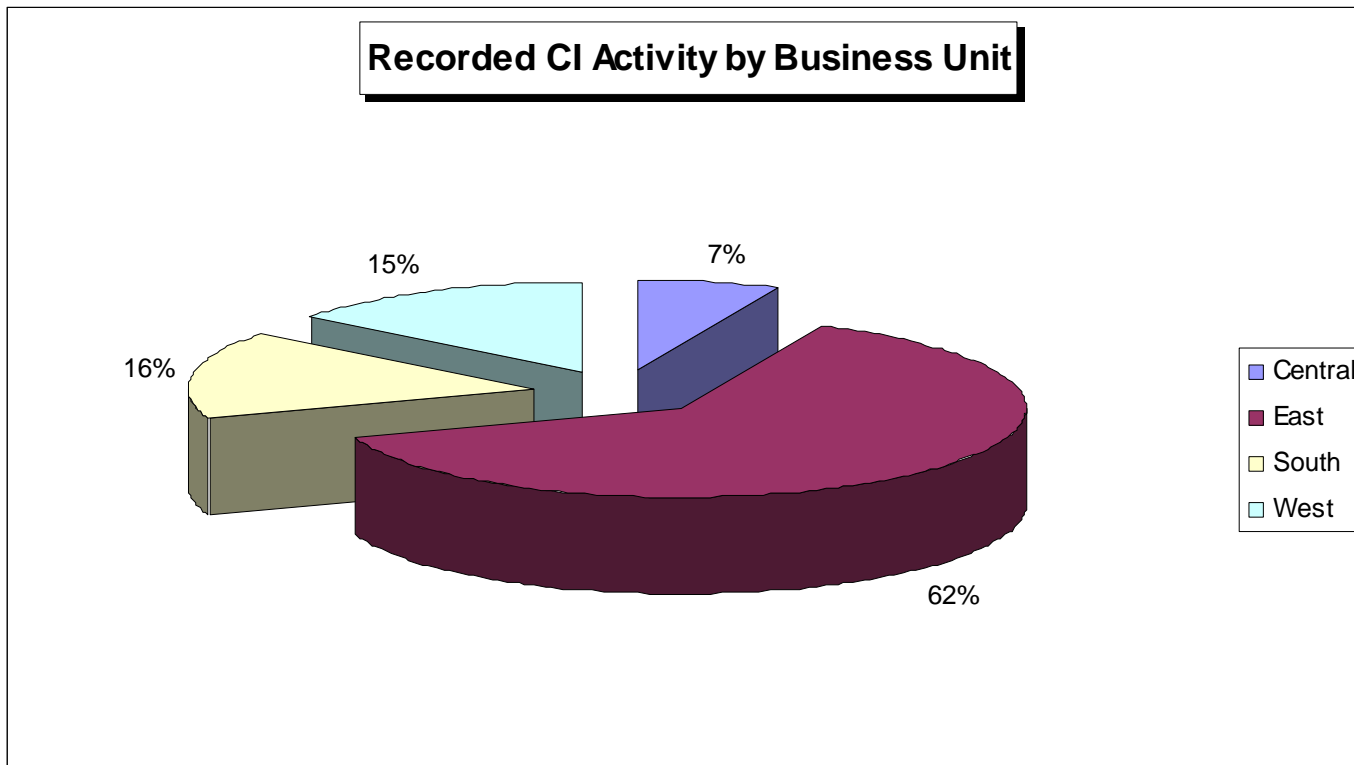


Table 5: Recorded CI Activity by Business Unit

	Number of Activities	%
Central	14	7
East	129	62
South	33	16
West	30	15
No answer (incomplete)	6	0



Region	Number of Activities	%
Central	10	5
Central & South Lancs	7	3
Fylde & Pennine	12	6
Greater Manchester & Cheshire	6	3
London & Kush	12	6
Midlands	16	8
Milton Keynes	14	7
North & West Yorks	25	12
North East (Northumbria)	73	35
South & East Yorks (Hull)	16	8
South & East Yorks (Sheffield)	6	3
South East	2	1
South West	4	2
Other	3	1
No answer (incomplete)	6	0

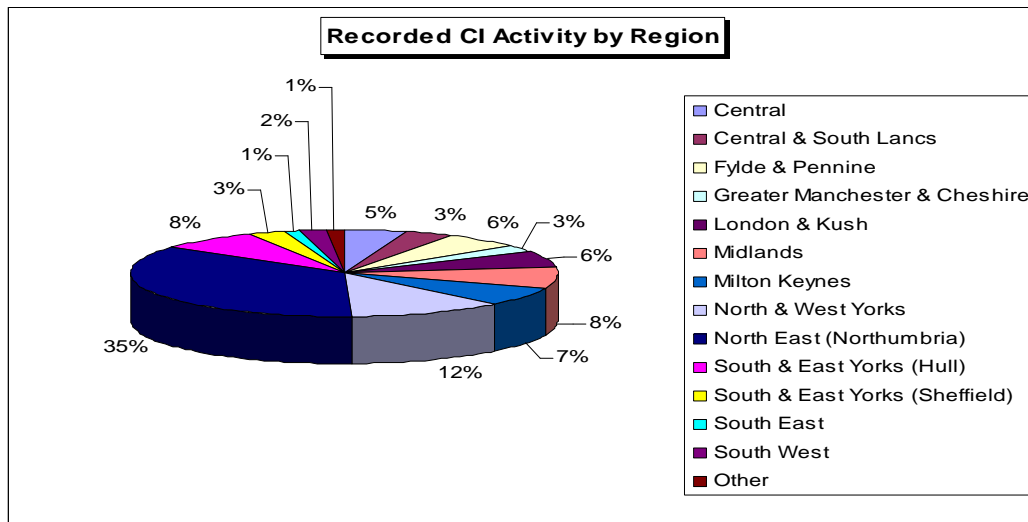


Table 7: Recorded CI Activity by Company Function

	Number of Activities	%
Customer Services	8	4
Homeowners	9	4
Homes	99	49
Income Collection Centre	4	2
IS	70	35
Other	12	6
No answer (incomplete)	9	0

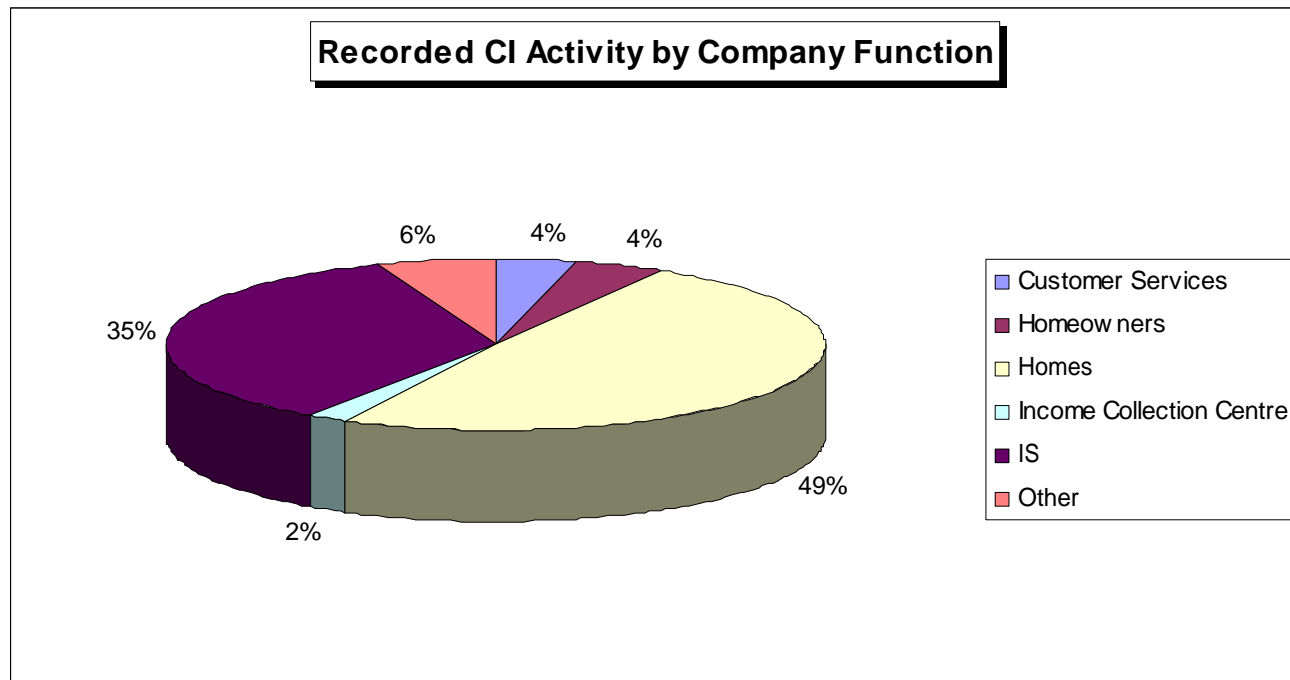


Table 8: Outcome

	Intended	Actual
Change to policy	17	15
Customer input to service review	56	50
Improvement to service delivery	141	135
Increased accountability	80	82
Increased skills	36	36
Other specific	75	68
Savings to budget	6	5

