



Caledonia Group Customer Service Strategy

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1. Introduction

At the Caledonia Housing Association Group (“the Group”) we are determined to be recognised as an organisation where excellent customer service is guaranteed. We recognise that our customers have a diverse range of needs and this is reflected in their differing requirements and expectations. Likewise, we also recognise that their priorities and aspirations are also diverse and ever evolving. We are committed therefore to aligning our services and overall customer service approach to these needs, priorities and aspirations.

This Strategy has been developed to directly support the implementation of the Group’s Achieving Excellence strategic objective and our new business vision – **Homes and services that make life better**. It sets out the actions that we will take across the Group to successfully deliver on the specific customer service priorities identified by the tenants at Caledonia and Cordale Housing Associations through the major customer satisfaction surveys carried out by both organisations in 2015; and also through the equivalent tenant and owner surveys carried out earlier this year by Bellsmyre Housing Association. It also reflects and complements the provisions of Group Customer Service Standards Policy approved in April 2016.

2. The Caledonia Housing Association Group

The Group comprises Caledonia, Bellsmyre and Cordale Housing Associations and is one of Scotland’s leading providers of high quality affordable homes for people in housing need. We own and manage around 4200 homes across Tayside, Fife and the Highlands through Caledonia, with a further 1600 owned and managed in West Dunbartonshire by Bellsmyre and Cordale.

We offer a wide range of housing types and tenures and associated tenancy and property management services that aim to meet the specific needs of our diverse customer group. We also complement our housing services with a range of tenancy support and care related services that aim to ensure that people can sustain and enjoy their homes and contribute to the communities where they live.

3. Strategy Aims

The main aim of our Customer Service Strategy is to ensure that we achieve high levels of customer satisfaction with the Group, and the services we provide, by focussing on key customer priorities. The tenants at Caledonia and Cordale provided clear views on their service priorities through the customer satisfaction surveys carried out in 2015. Summarising the wider survey outcomes, the tenants expressed their desire for good quality housing and property management services being consistently delivered and combined with high standards in customer service, value for money and affordable rents. There was a wish to see improvements achieved where performance was below expectations but also a firm view that service improvements should be balanced against the costs involved in achieving these. The key priority themes identified by the tenants through the two surveys were summarised as follows:

- Service provision
- Quality of home and environment
- Customer service
- Value for money and rents
- Communication

These themes formed the basis of the Group’s Customer Service Strategy for 2016-17. A range of service improvement actions were progressed in line with these themes and are summarised in the table below.

Caledonia	Reviewed the neighbourhood management service and implemented service improvements.
	Investigated variations in satisfaction across geographical areas and household types to identify areas where service improvements were required and could be made.

	Investigated reasons for views on the standard of home for new tenants when moving in and implemented a different service delivery approach in response to the outcomes.
	Reviewed the reactive repairs services at Caledonia and identified areas where service improvements could be made.
Caledonia & Cordale	Reviewed and assessed on-line self-service options for accessing and using services – this was used to develop our transforming customer service aims
	Developed an approach to demonstrating and reporting on value for money in consultation with the tenants at Caledonia and Cordale
	Development and implementation of more electronic based ways of communicating with tenants on service review and quality issues – this has been introduced at Caledonia and is being rolled out to Cordale and then Bellsmyre.
Cordale	Reviewed the neighbourhood environmental maintenance services to inform the development of a new service delivery approach.
	Progressed the extension of the welfare rights service to assist tenants with household financial issues
	Implemented the new staff team structure with the focus within this on additional resources to support neighbour dispute service related activities (including the new monitoring system introduced) and tenancy sustainment actions.

Our aim through this Strategy will be to continue improve overall levels of customer satisfaction by again focussing our resources on key improvement actions linked to these themes. Information on these is provided in Sections 4 – 8 below and in summary format in Appendix One. A key action will be a detailed analysis of the Bellsmyre customer satisfaction survey outcomes to determine key local priorities and inform the wider Group approach to customer service.

4. Service Provision

We are committed to ensuring that high quality housing and property management services are delivered on a consistent basis across the Group. The outcomes from the 2015 survey, in the main, highlighted high and improving levels of satisfaction with Caledonia and Cordale and the services that we provide. The recent major customer satisfaction survey carried out by Bellsmyre in the early months of 2017 also demonstrated significant improvements in customer satisfaction across all of the Scottish Social Housing Charter (SSHC) linked satisfaction indicators, whilst also highlighting areas for improvement and development.

The Associations in the Group are required to carry out major satisfaction surveys on a regular basis in order to meet the performance reporting requirements associated with the SSHC and the Scottish Housing Regulator's (SHR) Regulatory Framework. The information from these surveys forms the core element of our assessment of tenants' views on the quality and affordability of our services and the value for money that they represent.

Our service provision related improvement activities over 2017-18 across the Group therefore will focus on the implementation of major satisfaction surveys for Caledonia and Cordale and, as with the previous surveys, the detailed analysis of the outcome information from these. At Bellsmyre work will be carried out to analyse the outcomes from the recent major satisfaction survey. In line with our work previously, the focus of the analysis will be to assess overall service performance and identify tenant and factored owner priorities to inform future service provision priorities. At Caledonia and Cordale the surveys will also be used to assess the progress that has been made with improvement areas identified in the 2015 surveys.

More generally, we want to ensure that our services are effective and represent value for money. We will take steps to achieve this across the Group by setting challenging standards and targets for our services, benchmarking our performance against other housing associations and improving our use of technology to better support our service delivery activities.

In terms of local priorities, work will be carried out at Bellsmyre and Cordale, in line with their respective Business Plan aims, to improve service delivery in key areas. In working to build on the progress made over 2016-17, these again will include neighbour dispute and estate management services and (specifically at Bellsmyre) new reactive repairs arrangements. Further information on these is provided in Appendix One.

5. Quality of Home and Environment

In a broad sense we will seek to achieve improvements in satisfaction levels across the Group by continuing to invest wisely and carefully in the modernisation and upgrading of our homes and by ensuring that tenant priorities are reflected in the Group's Asset Management Strategy.

More specifically, as a key strategic priority we are aiming over the next five years to develop 750 new social rented and shared equity homes across our areas of operation as well as 250 alternative tenure homes. In working to respond to tenant priorities and our new business vision, our aim will be to seek to move towards a 'zero energy' standard for our new homes. We will also consider options to incorporate new digital technology within our new homes to support the transformation of customer service. Our success outcomes will focus on improving the quality and choice of housing available, but also critically seeking to minimise energy costs for our tenants as far as is practical.

In terms of local priorities, there will be a strong focus at Bellsmyre to deliver the initial phases of the five year planned maintenance programme, including work to ensure the Association's compliance with the requirements of the Scottish Housing Quality Standard. These actions reflect the focus and commitment through the Group partnership to improve the quality of the homes and the environment within the Bellsmyre area. Also, work will be undertaken at Cordale to develop a new comprehensive five year planned maintenance programme for the Association.

6. Customer Service

We want our tenants and other customers to have the best possible experience when they use our services. Linked to this we are very mindful that the way in which customers choose to engage with service providers has also changed, with more and more expecting and demanding 24/7 interaction, communication and delivery. To meet this and other related value for money challenges housing organisations are increasingly turning to investment in digital services to help to improve the scope of service delivery and service access channels whilst at the same time creating operational efficiencies that help reduce costs and keep rents affordable.

We are aiming to embrace a digital approach to customer service and service delivery across the Group and making it the key factor in transforming our approach to customer service and also achieving our vision of homes and services that make life better.

Our focus moving forward therefore will be on optimising self-service options for our tenants to access a range of services when and how they want. Service delivery will be underpinned by mobile technology which will in turn create opportunities for greater flexible working practices. Internal processes will be digital by default as far as is practically possible freeing staff time to concentrate efforts where it is most needed rather than focussing on process. Through transforming customer service we will aim to achieve improved customer satisfaction and value for money. We will also make life easier for our tenants and other customers by enabling them to engage with us through a range of access channels and manage their tenancy to suit their lifestyles rather than being led through our existing service access arrangements.

As regards specific local priorities, work will be undertaken at Bellsmyre and Cordale to prepare for and undertake external Customer Service Excellence assessments. This will support the focus at both organisations on continuing to progress, delivering improvement and becoming defined by service excellence.

Furthermore, we are fully aware of the central role that the staff team across the Group have in achieving our customer service aims. In essence, we want every member of staff to be committed to providing excellent customer service for every customer and for every service request. We will aim to do this by continuing with our work to:

- Equip our staff team with the right skills, knowledge and information to provide excellent customer service
- Embed a customer focussed culture amongst all staff at all levels across the Group
- Set challenging standards and targets for our customer service related activities

A programme of customer service and complaints related training is being progressed for the staff team over the course of 2017 and this will serve to further strengthen our approach to customer service across the Group.

7. Value for Money and Rents

Our tenants have told us that achieving high levels of tenant satisfaction in relation to views on value for money, as well as keeping rent increases as low as possible for existing and future tenants, are important for them. Linked to this, they also advised that they want us to ensure that our services are effective and provide value for money (VFM).

Taking account of these views and the Group strategic objectives, we are committed to embedding a VFM culture across the Group by ensuring that our services are effective, delivered in an efficient way, are well managed and monitored, reflect expressed tenant priorities and supported by appropriate technology. This will also involve the implementation of robust performance management arrangements and the provision of feedback to our tenants and other customers on our service performance outcomes. Furthermore, our VFM approach will involve a continued focus on maintaining a clear link to the needs, aspirations and priorities of the tenants across the Group; a clear focus on how we balance these with costs and available resources to ensure affordability; and ensuring that we have a clear understanding of our costs, investment needs and performance.

Our Customer Service Strategy for 2016-17 contained an action to consult with our tenants on how we should demonstrate VFM. The following approach has been developed from this consultation and will be implemented across the Group over 2017-18:

- VFM articles in each of our tenant newsletters to be issued over the year – to include income, expenditure and cost information and VFM related projects and initiatives
- Additional VFM information to be reported in Charter self-assessment focus group meetings
- Charter reports to be developed to include a clear VFM Scorecard
- More information on the business planning proposals with budget and rent setting proposals (including VFM intentions / targets) to be provided alongside rent consultation information
- VFM information to be mirrored on the Caledonia, Cordale and Bellsmyre websites with updates also provided through Facebook and Twitter

8. Communication

Key communication related priorities highlighted by the tenants through previous satisfaction surveys centred on the following:

- Keeping tenants and other customers informed
- Taking the views of tenants and other customers into account
- Listening to and acting on the views of tenants and other customers

Specific steps were taken at Caledonia over the course of 2016-17 to improve communication and involvement arrangements by extending the use of email based surveys to enable tenants' views to be more effectively taken into account in service review and design work. Work was also carried out to introduce a new website for Bellsmyre that reflects those in place already at Caledonia and Cordale.

In addition, new strengthened tenant participation arrangements were introduced for Bellmsyre and Cordale. Along with the equivalent strategy in place at Caledonia, the actions associated with these will form the core aspect of the Group's consultation and participation arrangements. In addition, work will also be carried out to extend the use of email based surveys to Bellmsyre and Cordale, including the new suite of recently updated service based routine surveys.

9. Performance Monitoring

We recognise the importance of measuring outcomes in order to determine success and to review and develop the Customer Service Strategy on an ongoing basis. We will measure the effectiveness of the Strategy on an annual basis through the indicators listed below:

- Delivery of the improvement actions detailed in the Customer Service Strategy Action Plan
- Monitoring and review of the customer service and service delivery related indicators within the performance management frameworks in place across the Group
- Monitoring and review of information relating to the implementation of the Customer Service Standards

10. Strategy Review

This Strategy will be subject to review on an annual basis and will be developed to link to and directly support the implementation of the priorities detailed in the Caledonia, Bellmsyre and Cordale Business Plans. Associated action plans within the Strategy will be developed for each organisation and implemented each year. These will be reviewed by the Executive Management and Operational Management Teams. The action plans will also be subject to review with the Tenant Scrutiny Panel and will be made available more widely to the Group's customers and staff team.

APPENDIX ONE – CUSTOMER SERVICE STRATEGY IMPROVEMENT ACTIONS – 2017-18

1. Group

GROUP SERVICE PRIORITY THEMES	IMPROVEMENT ACTIONS 2017-18
Quality of Home and Environment	Implementation of the actions detailed in the 'Providing 1000 homes by 2022' action plan.
Customer Service	Implementation of the actions detailed in the 'Transforming Customer Service' action plan.
Value for money and rents	Implementation of the new approach to demonstrating and reporting on value for money.
Communication	Implementation of the Tenant Participation strategies at Caledonia, Cordale and Bellsmyre.

2. Cordale Housing Association

CORDALE SERVICE PRIORITY THEMES	IMPROVEMENT ACTIONS 2017-18
Service Provision	Carry out the 2017-18 major tenant satisfaction survey and analyse the outcomes to identify tenant key tenant views and priorities and inform service and business planning.
	Review neighbour dispute service and develop new service policy.
	Review of the Estate Management Policy.
Quality of Home and Environment	Implementation of revised neighbourhood environmental maintenance services.
	Establish a new five year planned maintenance programme.
Customer Service	Achieve Customer Service Excellence accreditation.
Communication	Implementation of new suite of electronic based service satisfaction surveys.

3. Bellsmyre Housing Association

BELLSMYRE SERVICE PRIORITY THEMES	IMPROVEMENT ACTIONS 2017-18
Service Provision	Analyse the outcomes of the 2016-17 major tenant satisfaction survey and analyse the outcomes to identify tenant key tenant views and priorities and inform service and business planning.
	Procure and implement a new reactive maintenance contract.
	Undertake a strategic review of the factoring service.
	Review neighbour dispute service and develop new service policy.
	Review of the Estate Management Policy.
	Procure new reactive repairs contract.
Quality of Home and Environment	Examine the feasibility of introducing a close cleaning service and establish a consultation plan.
	Delivery of 5 year investment programme (including completion of SHQS programme).
Customer Service	Achieve Customer Service Excellence accreditation.
Communication	Implementation of new suite of electronic based service satisfaction surveys.

4. Caledonia Housing Association

CALEDONIA SERVICE PRIORITY THEMES	IMPROVEMENT ACTIONS 2017-18
Service Provision	Carry out the 2017-18 major tenant satisfaction survey and analyse the outcomes to identify tenant key tenant views and priorities and inform service and business planning.