

## ROLE PROFILE

<b>Role Title:</b>	Customer Scrutiny Team Leader
<b>Department:</b>	Quality & Customer Experience
<b>Role Purpose:</b>	<p>To support the delivery of the Customer Engagement Strategy and Customer Scrutiny Framework.</p> <p>Deliver effective scrutiny activity of operational services to provide information, evidence and supporting data that will provide feedback and / or recommendations to deliver continual performance improvement and shape policy and strategy direction.</p> <p>To provide effective management and leadership of the Customer Scrutiny team.</p> <p>Oversee design and delivery of customer scrutiny activity to meet Regulatory Responsibilities.</p> <p>Project manage all aspects of the Overview and Scrutiny Panels, Task and Finish Groups and other involvement opportunities, to continually drive positive performance and customer experience.</p>
<b>Reporting to:</b>	Senior Quality & Assurance Manager
<b>Responsible for:</b>	Customer Scrutiny Officers
<b>Disclosure level:</b>	NA
<b>Role Level:</b>	Frontline Manager

<b>Key Role Responsibilities</b>	<p>To support the design, implementation and delivery of an effective Scrutiny framework that involves customers.</p> <p>To produce annual scrutiny forward plan and create robust terms of reference of all activity to ensure delivery of agreed outcomes and value for money (VFM)</p> <p>To benchmark and scrutinise our service offer and performance against other service providers to provide assurance that performance and ways of working are fit for purpose, add value to the business by shaping policy and strategy development and are achieving the desired objectives.</p>
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	<p>To provide effective leadership and management of Customer Scrutiny Officers ensuring optimal productivity and quality of work leading to high levels of staff motivation and engagement.</p> <p>To develop broader corporate 'buy in' to the value of an effective scrutiny function. Specifically working with functional Directors to shape a meaningful programme that adds value to the ongoing improvement of operational practices.</p> <p>Ensure the work of the service improvement team is aligned to the recommendations and outcomes of the scrutiny work programme.</p> <p>Ensure scrutiny activity is focused to learn and improve upon our service, seeking feedback through formal engagement with Customers that is then developed into recommendations to shape and improve future service provision, policies and procedures and strategy..</p> <p>To monitor closely and manage local budgets in line with corporate objectives.</p> <p>To demonstrate and report upon VFM in terms of the impact of involvement on both Customers and the organisation, the total cost of customer involvement and costs arising from specific initiatives and any efficiencies or money or time saved because of the involvement.</p> <p>To contribute towards, and collate evidence to demonstrate, the attainment of all regulatory standards, identified accreditation and internal standards.</p> <p>To ensure accessibility of information to ensure Customers are kept appropriately informed and engaged.</p>
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<b>Education, Qualifications and Training</b>	<p>Good levels of numeracy and literacy</p> <p>Degree level or equivalent</p>
<b>Knowledge and Experience</b>	<p>Effective leadership</p> <p>Proven track record of effective scrutiny of services using a wide range of approaches.</p> <p>Shows experience of leading the scrutiny of services to</p>

	<p>customers, making recommendations based on this to improve services and measure these improvements.</p> <p>Can demonstrate experience of tailoring approach to customer scrutiny that meets the needs of all customers and has measurable outcomes.</p> <p>Demonstrate ability in developing and interpreting performance information, best practice, expert information and any other relevant insight information.</p> <p>Experience of working with customers to improve services.</p> <p>Experience of managing budgets.</p> <p>Experienced in research of best practice techniques</p> <p>Thorough knowledge of Regulatory Responsibilities of social housing providers.</p> <p>Experience of producing effective reports and action plans that have clear, measurable outcomes.</p> <p>A sound understanding of MS Office including ability in MS Word, Outlook, Excel and Powerpoint.</p>
<p><b>Role Specific Skills &amp; Behaviours</b></p>	<p>Effective scoping and planning of own and team activity with an ability to organise &amp; prioritise own workload and that of a team; deliver work on time and to the required standard</p> <p>High levels of written and verbal communication adopting appropriate tone and language suitable for a variety of recipients.</p> <p>Ability to consciously consider and choose the most appropriate means of influencing to reach a specific outcome</p> <p>Commitment to customer involvement, service improvement and robust governance.</p>

# **Customer Engagement and Scrutiny Strategy**

**Authorised: September 2016**

**Author – John Walker, Director of Quality and Customer Experience**

## Objectives

In common with all other housing and care providers, we are operating in a very different environment to that which was in place when we developed our previous engagement strategies.

Recent government policy announcements and their impact on housing associations together with the continuance of austerity policies from both central and local government have radically changed the environment in which we operate. This has led to a need to reconsider our engagement plan so that we deliver value for money and can become 'Fit for the Future'.

There are two key drivers of the strategic approach:

1. **Continuous Improvement** - to ensure delivery of the Fit for the Future outcomes and consistently deliver a high quality Customer experience
2. **Regulation** - to deliver the co-regulation of the Consumer Standards as outlined within Homes and Community Agency (HCA) regulatory framework for Social Housing.

Midland Heart wants to ensure that the Strategy and all associated engagement activity is transparent and has clear purpose that relates back to business objectives. It is also important to create a positive experience of being a Midland Heart Customer. The overarching outcomes are:

- Midland Heart is financially strong and engagement activity represents value for money.
- Tenancies are sustained
- Services are accessible and deliver a high quality customer experience

## Approach and Objective

The approach will be to ensure that where possible there is fair and appropriate demographic and geographic representation of our Customer base encouraging diversity and equality.

Our engagement with our Customers will be to scrutinise performance against the Consumer Standards within the regulatory framework and to act as a consultative mechanism to gain feedback on customer experience and service

improvement opportunities. This will include influencing policies and strategies.

The organisational Customer First Strategy will link into our engagement activity over the next two years and aims to transform how we interact with Customers so we can target resources in the right areas, resolve queries quicker and ultimately increase Customer satisfaction. Our Customer Engagement activity will focus on the objectives of this and continually improving the outcomes of this for our Customers.

Engagement with Customers should be a partnership arrangement to influence and shape services but should not be seen as a supplement to operational management.

This strategy will also seek to ensure that customer engagement activity is effective for both the business and its customers, can demonstrate impact, outcomes and represent value for money.

The manner in which engagement is delivered will be aligned with the organisational values;

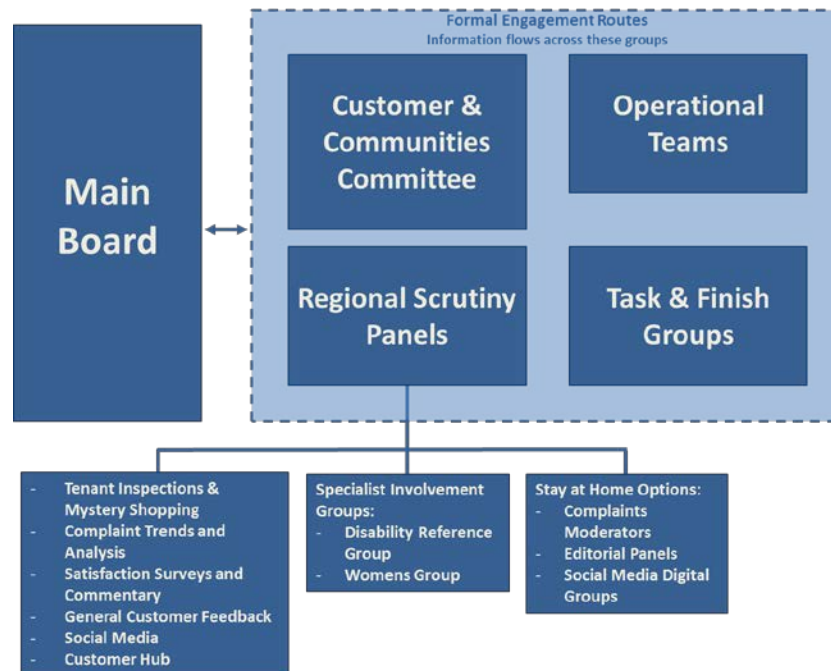
**People Focussed:** Engagement work will focus on capturing customer feedback to ensure that an excellent customer experience is achieved.

**Inclusive:** A broad range of customer views will be sought through a range of different activities. This will be as representative of our overall customer base as possible.

**Professional:** All engagement activity will be conducted in a professional manner, be focussed with clear tangible outcomes, be followed up on and represent good value for money.

### **Enablers**

The design of future performance management and scrutiny activity to deliver engagement should remain aligned to the agreed principles of clear lines of communication throughout the agreed governance structure (as outlined in the diagram below).



Midland Heart will continue to utilise a range of methods to ensure appropriate and meaningful engagement. This will include gathering and utilising feedback gained from:

- Customer Surveys – there are in excess of 16000 surveys planned to be conducted during 2016/17 covering:
  - Income
  - New Lettings
  - Communal Services
  - Repairs
  - Gas Repairs
  - Gas Servicing
  - Complaints
  - ASB (inc. Restorative Justice)
  - Planned Maintenance
- Complaints, Compliments and Comments
- Estate inspections
- Service Review Task & Finish Groups
- Complaint moderators
- Mystery Shopping
- Customers engaged in Procurement Activity
- Specialist customer working groups such as the women’s group and the disability reference group.

The combination of all feedback received from the above will be integral to evaluating the performance of Midland Heart service offerings and identifying best practices and service improvement that will be taken forward internally within operational review forums.

### **Delivery Methodology**

Midland Heart will ensure activity is accessed via a wide range of mediums encompassing a combination of traditional criteria, i.e. meetings and surveys, but by the end of the 2016/17 performance year should be embracing online technology to create new ones, e.g. social media forums, which in turn aligns itself to the channel transformation objective outlined in the Customer Access Strategy.

Activity has already commenced relating to service scrutiny through the design and delivery of a forward plan which encompasses a post implementation review of the Customer First initiatives (encompassing Customer Hub, People and Place delivery model), Midland Heart Service Standards, Customer feed into the Board Planning Process and effectiveness and usability of digital service routes and plans to enable self-serve functionality.

Terms of references have also been developed in respect of Customer involvement.

It is important to continually evolve all aspects of engagement and scrutiny performance to maintain alignment to business change and to maintain the effectiveness and efficiency of all activity. Part of the process to fulfil this will be a continuous review of actions, membership, structure and purpose culminating in a formal annual review to establish past learning to feed into future considerations.

Future engagement activities proposed from within Midland Heart will be subject to a cost / benefit analysis and will need to be fully scoped, outlining specific requirements, tasks, actions and outcomes to ensure a return on investment. After each activity is complete, a review will be undertaken to assess the effectiveness and measure whether the original objectives and outcomes have been achieved. This will create an 'audit trail', which will feed into an annual value for money and impact assessment.



Staff working on Customer involvement will be expected to demonstrate the VFM of their work if funding for this activity is to be protected. To demonstrate VFM, information will be collected about:

- the impact of involvement on both Customers and the organisation
- the total cost of customer involvement and costs arising from specific initiatives
- any efficiencies or money or time saved as a result of the involvement.

This information needs to be captured in a systematic way. All staff should play a part in collecting information and recording the outcomes and impact of tenant involvement.

A general review of engagement incidental expenditure will also be conducted, inclusive of payment of expenses and event management costs (venues / hospitality etc). An impact assessment matrix will be completed to cover the following key criteria:

- Inputs: Resources that contribute to a programme of activity (financial expenditure, meetings held, resident and staff hours involved)
- Outputs: Countable units (meetings attended, training courses attended, number of residents attending an event)
- Outcomes: Benefits or changes affecting residents that are usually planned for
- Impact: All changes resulting from an activity or project – intended/unintended, negative/positive and long-term/short-term. A measurable effect that is both quantitative and qualitative

There is a dependency on ensuring the right level of skills and knowledge is held by Staff members and Customers to deliver objective requirements accurately and effectively. As part of the engagement activity review the Customer Scrutiny and Engagement Teams, in consultation with the Scrutiny Commission and key stakeholders, will provide a suite of tools and develop a training matrix to address priority development needs. Midland Heart's Learning & Development team should be engaged to identify, and where possible provide solutions to, demand.

## **Outcomes / Measures**

An annual value for money assessment will be produced for Customer and Communities Committee summarising a consolidated view of the value for money demonstrated in line with aforementioned criteria.

The outcomes of the Customer Involvement strategy are aligned to those outlined in the HCA Regulatory Framework, the VFM Strategy and the Fit for the Future Corporate. In summary, effective scrutiny and engagement will lead to streamlined services, delivering against the 'Right 1<sup>st</sup> Time' expectation and a 'Customer First' standard. Principally objectives will be to ensure:

- ✓ Full compliance with HCA consumer standards across all disciplines and retention of the government led Customer Service Excellence Standard (CSE)
- ✓ To help achieve our overall organisational objectives:
  - Deliver consistently high levels of Customer satisfaction for our landlord services - target to 2020: 90% overall Customer satisfaction.
  - Transform Customer contact so that at least 50% of all Customer transactions are done online.
  - Support sustaining tenancies – this is even more central in an environment of welfare & policy changes. Target to 2020: Reduce the preventable (e.g. abandonments) ending of tenancies to 10%.
  - Deliver with agreed budget allocation for Customer Engagement to support enablement of the corporate financial plan to mitigate against the impact of changes in our operating environment e.g. rent reduction, RTB, welfare changes