



Customer Service Standards

Tenant Review Report

April 2023

The Review Group would like to thank the Viewpoint staff who participated in and assisted with the review and scrutiny process

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1. Executive Summary

1.1 Scope of Review

To devise a new set of customer service standards for approval by the Board that ensure that customers receive consistent, good quality advice and assistance when dealing with Viewpoint

This will include making recommendations on how to publicise the agreed customer service standards to current and new tenants and to ensure that staff (present and future) have the skills, knowledge and training to implement them.

1.2 Process

As part of the project the group carried out the following activities:

- A review of the existing customer service standards
- Meeting with relevant staff
- A mystery shopping exercise
- A review of the tenant satisfaction survey report 2022
- A discussion with Cunningham Housing Associations scrutiny panel

1.3 Key Recommendations

The Group have a number of recommendations for Viewpoint to consider, which are detailed in section 7 of this report.

The key recommendations include:

- Importance of ensuring staff have adequate training and support for their role
- Having systems in place to monitor the standards where required
- Promoting and then reporting back to tenants on the performance against these standards
- Appropriate IT systems need to be in place and used effectively to achieve these proposed standards

2. Foreword

The Customer Service Standards Review Group (the Group) is pleased to submit our tenant led inspection report to Viewpoint Housing Association's Leadership Group and Board Members for their consideration.

3. Tenant Scrutiny (Review)

3.1 Tenant Scrutiny in Context: Tenant scrutiny is about tenants being actively involved in reviewing how housing services are being delivered, and even more importantly, how they can be improved. Tenant scrutiny and self-assessment in Scotland represents a very significant opportunity to develop partnership working between tenants and landlords to deliver excellent housing services.

Tenants on the working group feel that the term scrutiny sounds harsh and therefore have chosen to use review to explain the work they have been doing in relation to customer service standards.

3.2 Understanding Tenant Led Reviews: Tenant led reviews are a popular way of involving tenants in improving housing services. It is a process where tenants independently inspect a housing service to review how well it is working and to identify recommendations for improvements. It is a tangible way of involving tenants where everyone can see positive results at the end of the process.

Tenant led reviews provide opportunities to:

- Review housing services from a tenant's perspective
- Hold service providers to account
- Contribute to improvement in housing services, whilst ensuring policies and procedures are clearly understood and implemented
- Inform policy development and delivery
- Ensure resources are used effectively and that services delivered provide value for money
- Benchmark and share good practice

The benefits of tenant led reviews are far reaching and include:

- Opportunities to involve new people in tenant participation activities
- Building the skills of organisations and individuals
- Involving tenants in a constructive and practical way
- Enhancing the landlord's customer care focus
- Developing relationships between tenants, tenants' organisations and landlord staff
- Meeting the requirements of the Scottish Housing Regulator and Scottish Social Housing Charter
- Driving forward improvements in housing services

4. Customer Service Standards Review Group

The Group were recruited from Viewpoint's Tenant Volunteers.

All existing tenant volunteers were asked if they wished to be part of the group. Twelve tenants came forward, however due to other commitments or personal issues the group reduced in size to six members.

The Group decided they wished to work with a staff group to finalise the standards, once they had completed their review. Seven members of staff volunteered to be on the group, representing the different departments within the organisation.

5. Review Process and Findings

The Group looked at and considered the following:

- Legislation – Scottish Housing Charter
- Viewpoint's Tenant Satisfaction Survey Report 2022
- Existing Customer Service Standards
- Discussions with Housing Services
- Discussion with Asset Services
- Discussion with Staff Working Group

- Mystery Shopping
- Discussion with Cunningham Housing Association

The findings are detailed below.

5.1 Legislation

The Scottish Social Housing Charter was reviewed and noted.

5.2 Tenant Satisfaction Survey 2022

The Group reviewed the tenant satisfaction survey report. Some of the questions or possible points of action that were raised were not within the scope of the group but have been noted and will be passed on to the relevant departments for progression.

Findings

It was noted that as some people get older they have more limited contact with the outside world and, although there are genuine concerns and complaints, perhaps managing the expectations, through clear customer service standards will help achieve this.

We need to ensure that we continue to offer information in a variety of ways to ensure that tenants can contact us in a way that suits them.

5.3 Existing Customer Service Standards

Many of the existing standards were relevant to what tenants wanted although some required minor amendments to make them more specific.

Findings

Some of the existing customer service standards were actually statutory requirements and as such did not need to be included within the new customer service standards and were, therefore removed e.g. service all gas appliances annually. In addition, there were standards, which were about outcomes of service delivery, and not a customer service standard, e.g. rent arrears targets, letting times and repair timescales.

5.4 Discussions with Housing Staff

There was a discussion with the Head of Housing on rent arrears management, customer contact and housing management.

Findings

Lower level rent arrears were not always dealt with timeously, however this has been addressed recently and new processes put in place to manage this.

The good work by Housing Officers was noted and that the arrears were around the target set for the organisation. During COVID, these had been managed well.

The employment of the Welfare Benefits Officer, Housing Benefit Services from Edinburgh City Council and the joint Debt Advice project with the ARCHIE group were all highly praised by the group in assisting tenants manage rent arrears and debt.

The resolution of anti-social behaviour was difficult to define and it was appreciated that there were limitations and, sometimes, a dependence on external agencies was necessary to help resolve this.

5.5 Discussion with Assets Staff

There was a discussion with the Head of Assets regarding maintenance and improvements. Right to Repair and managing customer expectations in repairs was discussed.

Findings

The repair administration team had gone through a difficult period with temporary staff, however this would soon be resolved and a degree of stability obtained for the service.

The group found that gardening services were a point of issue for many tenants and that this did not appear to be recorded in a way that assisted the management of the contract.

It was highlighted that the Right to Repair was not something that tenants were aware of, nor was it something that tenants were advised of when they reported a repair that fell within this. The Assets Team will address this immediately.

Managing expectations on repairs was important, however tenants are not told what the priority of the repair is and the target date, although they are told the contractor would contact them to make an appointment to carry out the repair.

It was unclear whether tenants were being offered morning or afternoon appointments or just given a day. Viewpoint's repairs policy does not specify a morning or afternoon appointment, just that an appointment would be made. The group felt that narrowing the time of the appointment would increase satisfaction

It was noted that repair satisfaction surveys had stopped during the pandemic but these have been reviewed and were restarted during 2022.

The discussion on repairs being completed right first time, as set down by the Scottish Housing Regulator was discussed. The group felt that this was an unfair target, however on discussion it highlighted that the terms 'right first time' was easily misunderstood and that the definition from the Regulator did clarify this.

5.6 Discussion with Staff Working Group

The staff working group were asked the following in relation to the existing customer services

- Did they form part of the formal induction?
- Were they promoted during on the job training?
- Was there any ongoing awareness?
- What their views were on the existing service standards?

Findings

It was clear from the staff responses that the existing customer service standards:

- Did not form part of the formal induction
- Were not promoted during on the job training

- There was no ongoing awareness of the customer service standards
- The staff group felt the existing service standards were on the whole fair, although noted some were not relevant or needed updated

However, it was noted as part of the discussion that regular support and supervision sessions were in place with most staff to discuss performance, highlight areas of concern and carry out work planning to achieve goals that fed into the overall objectives of the Association.

5.7 Mystery Shopping

The Group decided to carry out some mystery shopping to test how the present standards were currently working.

Four different mystery shops were completed:

1. Wearing of ID
2. Telephone for balance on rent account
3. Telephone for information on moving to a Viewpoint property
4. Email for copy of complaints procedure

Note that no mystery shop was carried out for repairs as they were short staffed and working with temporary staff at the time this task was completed.

Appendix 1 shows the mystery shops carried out and the outcomes, with mystery shopper comments.

Findings

1. Wearing of ID

The majority of staff wore their ID when on site.

2. Telephone for balance on rent account and Telephone for information on moving to a Viewpoint property

- In general, telephone calls were answered promptly with polite and friendly greeting. Members of staff gave their name when answering the telephone
- Where staff were unsure a call back was offered to the tenant
- Good information provided by staff on both topics

3. Email for a copy of the Complaint Procedure

- These were dealt with in a timescale of between 16 minutes and 4 days
- Emails were polite and courteous
- Replies answered the questions asked

The outcomes for the mystery shop were very positive and encouraging and showed that there are many good practices already in place.

5.8 Meeting with Cunningham Housing Association

A Zoom meeting was held to allow the group to talk to Cunningham Housing Association's scrutiny group regarding their scrutiny into customer services. Ideas and experiences were exchanged.

Findings

There were no specific findings for this although the sharing of experiences was useful for all.

6. Proposed Customer Service Standards

From the information we have obtained, and through review of the current service standards, the following is a list of our proposed customer service standards for Viewpoint Housing Association.

It should be noted that the review group have tried to take into account how these standards affect staff and working practices and that the proposed standards have been discussed with the staff-working group.

We have made some notes in relation to specific standards in terms of some of the things we feel need to be considered in implementation, if these standards are agreed.

Appendix 2 lists the proposed service standards that will be published on our website, in Newspoint and in a leaflet.

	Standard	Notes
1	Answer all calls promptly with our standard greeting in a polite and friendly manner	Standard Greeting to be: <ul style="list-style-type: none">• Good morning/afternoon• Viewpoint Housing or the site name• Staff members name• How can I help you?
2	Acknowledge emails, texts, website enquiries and letters within two working days	Acknowledgement can be by text, email, telephone, in person, via on-site staff or in writing.
3	Respond to letters, phone calls, email and website enquiries within five working days	All staff need to be able to use QL to record these (and assign to other work trays if appropriate) and to sign these off. If staff are off unexpectedly there needs to be a system in place for the work to be re-assigned or the tenant contacted by Viewpoint to advise of the delay. Staff need to use their Outlook calendars so other staff are able to give informed advice to customers Staff need to use out of office messages on Outlook. This needs to include an alternative contact if the enquiry cannot wait until they return to work e.g. a name and phone number or email address.

	Standard	Notes
		<p>If a member of staff is unexpectedly off then there needs to be something in place to put an out of office message on Outlook and an alternative contact.</p> <p>Staff need to be adequately trained on QL and Outlook</p>
4	Staff to wear ID when on site and Contractors should either wear ID or have ID available to show tenants	This is essential for the security of tenants
5	Offer private interview facilities to tenants when they wish to speak to staff.	<p>Most appointments are offered within the tenant's home. Noted that other arrangements can be made if required.</p> <p>Noted that there are no interview facilities at 4 South Oswald Road and that on our sites there may be limited facilities and therefore an appointment may be needed.</p> <p>Where there are two coordinators on duty, someone calling into the office can tie up both coordinators and perhaps this needs to be looked at to ensure privacy for the tenant e.g. take the tenant to another area for a private interview.</p>
6	Make appointments that are convenient to customers and inform them as soon as possible if the appointment cannot be kept.	As part of the training staff should be reminded that cancelling appointments should be rare and not something we do routinely.
7	Contact tenant to provide advice and support within 28 working days of arrears showing on the rent account.	
8	Send out rent statement to all tenants at least once per year	This will assist in arrears management by making tenants aware of the balance on their rent account.
9	Carry out quarterly meetings and walkabouts as per procedures at each development and produce an action plan following each meeting.	Noted that frequency of meetings or processes may change in individual areas as long as this is agreed by both parties

	Standard	Notes
10	<p>Give clear information at the point of service requests from customers. This should include:</p> <ul style="list-style-type: none"> • Timescales • Process. • Other relevant information 	<p>This is to help manage customer expectations.</p> <p>Where timescales are included within our policies then these should be communicated to tenants.</p> <p><u>Timescales</u> – examples include timescales for repairs or how long housing application will take to process</p> <p><u>Process</u> – examples include advising contractor will contact to make an appointment to carry out a repair, or that a police report will be requested</p> <p><u>Other relevant information</u>- examples may be about right to repair or about availability of welfare benefit or debt advice services</p>
11	<p>Publish plans for major works on an annual basis showing proposed work for at least the next three years.</p>	
12	<p>Where specific plans or actions have been communicated to tenants and these cannot be met, tenants should be informed of the delay, reasons for the delay and, if possible, the revised timescale.</p>	<p>This information may be given on an individual basis, through the notice board or through Newspoint and the most appropriate method would be decided as and when these situations arise.</p>
13	<p>Ensure that tenant’s individual needs are met in relation to communication e.g. interpreters, large print, audio etc.</p>	<p>Noted that Viewpoint already do this and that other things may be highlighted as Viewpoint gather equality data that will have to be considered.</p>

7. Recommendations

7.1 Staff Training and Implementation

- 7.1.1 Training should be given to all staff on the customer service standards regardless of their role. Even if staff are not providing direct services to customers, the tasks they carry out may affect other staff to meet the standards set.
- 7.1.2 Staff awareness needs to be raised and it is suggested that new staff should receive a copy of the standards with their offer of employment letter.
- 7.1.3 Customer service standards need to be part of induction process for all staff.
- 7.1.4 Ongoing staff awareness of the customer service standards can be achieved through support and supervision sessions and at team meetings. This gives staff the opportunity to discuss individually and collectively and resolve any issues quickly.

- 7.1.5** As not all staff use contact management on QL it is important that training is given and it is then used timeously to accurately record timescales.
- 7.1.6** Training may be required for staff on Microsoft Outlook to use out of office messages or checking other staff calendars. This will assist when allocating work on QL contact management and all staff will know who is on holiday, off sick, working from home or on site.
- 7.1.7** Systems need to be set up to deal with staff absences in relation to work in work trays or emails coming in, e.g. Managers need to be able to access work trays and redistribute work if required for unexpected absences and out of office messages put on email for these instances.
- 7.1.8** Out of office messages should give the tenant an alternative contact if the matter is urgent and they are unable to wait until the member of staff returns to work from sickness or holidays.
- 7.1.9** Training is required on the Right to Repair for all front line staff.
- 7.1.10** A more robust system to record satisfaction levels with the gardening services needs to be put in place so that issues are recorded, dealt with and tenants know what the outcome will be.
- 7.1.11** More information needs to be given to tenants when reporting a repair in order to manage expectations of tenants, which will mean they are more aware of how long a repair should take to complete.
- 7.1.12** Tenants are not offered a morning or afternoon appointment for a repair to be completed. As it is not part of current contracts, then Viewpoint should make tenants aware of this to manage expectations and it should be a consideration in future contracts to improve services to tenants.
- 7.1.13** Agreement on other areas of service delivery need to be discussed and agreed what information should be given to the tenant at the point of service request.

7.2 Promotion of Customer Service Standards to Tenants

- 7.2.1** It is important that tenants are fully aware of the standards they can expect and what to do if the services do not meet these.
- 7.2.2** In order to promote the service standards the following is suggested:
- A leaflet should be developed in conjunction with the staff team once standards agreed
 - The leaflet should be distributed with the invite to the quarterly meeting and would also be on the agenda for that meeting
 - An article to be included in Newspoint highlighting the standards and the work that tenants did for this
 - A leaflet will be part of the new tenant pack
 - Customer service standards should be a standard item on the quarterly meeting agenda.

7.2.3 In addition the 'who's who' in the front line staff team should be updated and include details of team leaders and how to make a complaint.

7.3 Review of the Customer Services Standards

7.3.1 The review of the customer service standards has been a big task and in order to see how things are progressing the group recommend that they carry out an interim review 12 months after implementation.

7.3.2 Thereafter the standards should be reviewed every three years, around the same time as the satisfaction survey, to ensure they are still fit for purpose.

7.3.3 Consideration could be given to asking questions about customer service standards within the tenant satisfaction survey where they are not easily measurable.

7.3.4 Performance against the service standards should be reported to the Board, to the staff and to tenants on a regular basis, with a minimum of annually.

8. Conclusion

The outcome of the review has shown that there are many positive working practices taking place within Viewpoint. Staff work very hard to achieve targets and to give good customer service.

There are examples of poor customer service; however, it is felt that some of these may be a perception that comes from Viewpoint's management of customer expectations. It was noted that each department has to take responsibility for this, and this includes departments who may not work directly on the front line.

The revised customer service standards aim to ensure that customers know what to expect and will therefore understand why things are done in a certain way or have an awareness of timescales.

One of the biggest issues to arise from the tenant satisfaction survey in 2022 was communication with issues such as staff not returning calls or answering emails within a 'reasonable' time, and sometimes not at all. The revised customer service standards aim to ensure that tenants know what the timescales are and that this can be monitored and reported on to tenants.

The Review Group ask that the proposed customer service standards are approved and that the recommendations are agreed.

The Review Group appreciate that implementation of all the standards will not be immediate as there will be a lead in time for staff training and setting up systems, where required. However, the Group feel that a timescale for implementation is required and suggest that this takes place within six months of the date of approval.

The Review Group feel that all recommendations should be implemented within six months of the date of approval.

The Review Group ask that a written response to this report is given to them within four weeks of the date of the Board meeting, advising of the outcomes and any implementation plan.

A further update for the Review Group is requested on the progress of these six months from the date of approval.

Mystery Shopping 1 – Wearing of ID			
<p>Over a period of 7 days when you see any member of Viewpoint staff have a quick check to see if they are wearing their ID.</p> <p>You may see the same member of staff or different members of staff or you may not see anyone at all.</p>			
Wearing of ID Shop			
	Yes	No	Comment
Shopper 1	3	0	
Shopper 2	3	0	
Shopper 3	2	0	
Shopper 4	0	0	
Shopper 5	0	1	When asked member of staff did not feel they had to wear ID on site – only at the main office
TOTALS	8	1	

Mystery Shopping 2 – Telephone Scenario 1			
<p>Scenario: Can you tell me what the balance is on my rent account?</p>			
Method: Telephone Shop			
	Yes	No	Comment
Was the telephone answered promptly?	3	1	Answerphone said office closed although it should have been open
Was the call answered in a polite and friendly manner?	4		
Did the member of staff answering the call give their name?	4		<ul style="list-style-type: none"> • Just said who she was and how can I help you • Introduced herself and said how can I help you
Was the member of staff able to deal with your enquiry?	4		<ul style="list-style-type: none"> • Half – told me about Edindex but did not know how to do it without computer. She did offer to find out and call me back. • Was given a full talk through exactly how to go about getting an Edindex form and how to go about filling it in and apply for a house. Very helpful and pleasant.

			<ul style="list-style-type: none"> • Explanation given on how to go into Google etc. • There was no need to telephone because the way to apply was fully laid out on your homepage (website)
If no, was your call transferred to another member of staff? Were you told their name?			Not applicable – no calls transferred
If you were not transferred to another member of staff, was a message taken for someone to call you back?			Not applicable
If you were told someone would call you back did this happen and how long did you wait for the call back?			Not applicable

Mystery Shopping 3 – Telephone Scenario 2			
Scenario: Can you provide me with information on how to apply for a Viewpoint property?			
Method: Telephone Shop			
	Yes	No	Comment
Was the telephone answered promptly?	3	2	
Was the call answered in a polite and friendly manner?	3	1	<ul style="list-style-type: none"> • With 'Hello' • Answering Machine
Did the member of staff answering the call give their name?	4	1	Just said 'Hello'
Was the member of staff able to deal with your enquiry?	3	1	<ul style="list-style-type: none"> • Immediately and very polite. All done in 3 minutes • It took a very long time to find what I wanted
If no, was your call transferred to another member of staff? Were you told their name?	1	2	
If you were not transferred to another member of staff, was a message taken for someone to call you back?		1	
If you were told someone would call you back did this happen and how long did you wait for the call back?	1		Time taken for call back not recorded

Mystery Shop 4 – Email Responses

Mystery Shopping 4 - Email			
Scenario: Request a copy of the complaint procedure			
Method: Email Shop			
	Yes	No	Comment
Did you know the email address before you started your enquiry?	3	2	
If no, how easy was it to find the email address on our website or by phoning our offices?	1		<ul style="list-style-type: none"> • Used search and got all the information I needed • Found address on letterhead
Did you receive an acknowledgement and if so how soon after the email was sent did you receive this.	2	3	<ul style="list-style-type: none"> • An acknowledgement was sent immediately • Acknowledged in 16 minutes
How soon after the email was sent was a reply received?			<ul style="list-style-type: none"> • 4 days with attached copy of document • 1 day • 1 hour – with links to procedures and website • 16 minutes – with link to specific document
Was the email polite and courteous?	5		<ul style="list-style-type: none"> • Very and very helpful • Very
Did the email answer your enquiry?	5		<ul style="list-style-type: none"> • Copy attached to email • Fully • Indeed it did

Proposed Customer Service Standards

Customer Service Standards	
1	Answer all calls promptly with our standard greeting in a polite and friendly manner
2	Acknowledge emails, texts, website enquiries and letters within two working days
3	Respond to letters, phone calls, email and website enquiries within five working days
4	Staff to wear ID when on site and contractors should either wear ID or have ID available to show tenants
5	Offer private interview facilities to tenants when they wish to speak to staff.
6	Make appointments that are convenient to customers and inform them as soon as possible if the appointment cannot be kept.
7	Contact tenant to provide advice and support within 28 working days of arrears showing on the rent account.
8	Send out rent statement to all tenants at least once per year
9	Carry out quarterly meetings and walkabouts as per procedures at each development and produce an action plan following each meeting.
10	Give clear information at the point of service requests from customers. This should include: <ul style="list-style-type: none"> • Timescales • Process • Other relevant information
11	Publish plans for major works on an annual basis showing proposed work for at least the next three years.
12	Where specific plans or actions have been communicated to tenants and these cannot be met, tenants should be informed of the delay, reasons for the delay and, if possible, the revised timescale.
13	Ensure that tenant's individual needs are met in relation to communication e.g., interpreters, large print written etc.