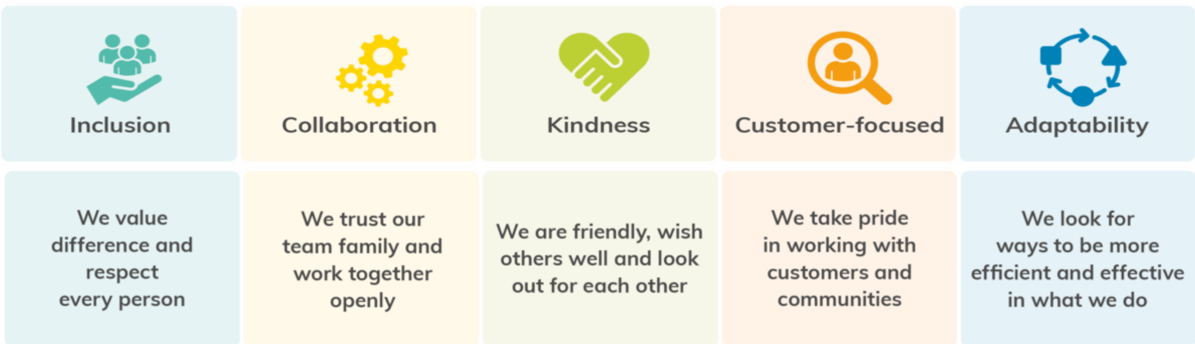
Customer Scrutiny Procedure



1. Introduction

Customer scrutiny reviews are an in-depth look into a specific service area. Customers carry out these reviews to identify what is good about the service and what could be improved.

Customers then make recommendations as to how improvements can be implemented. These recommendations are discussed between staff and customers and actions are agreed together. These actions are then tracked by the Board and customers.

We use a task and finish approach to scrutiny reviews. This means that customers volunteer to join a scrutiny review dependent on their availability and interest in the subject. The customers involved in a scrutiny review can be different every time.

There are many different ways to deliver scrutiny reviews and we have chosen this approach by working with customers and agreeing what is best for customers and Greatwell Homes at this moment in time.

We aim to complete 2 scrutiny reviews a year. The service areas being reviewed are chosen during our topic selection process; a survey is completed by staff and customers to nominate service areas for customer involvement. These areas are added to our selection matrix and topics are chosen by customers at a meeting once a year.

2. Scope

The scope is a document that explains why the service area has been selected for review and sets out determining questions that help direct customers to the specific areas that need to be researched.

It outlines key people and documents relevant to the topic. It will also feature an exclusions section; parts of the service that should not be researched, or where changes cannot be made, perhaps due to legal or financial reasons.

The scope also shows timescales for key points in the project, for example the date of the Board meeting where scrutiny recommendations will be signed off by Board, the roundtable date, and the date for the scrutiny report to be submitted by customers.

3. Planning the review

Scrutiny reviews happen over a 12 week period and we create a 12 week plan that sets out the tasks and deadlines. Customers will be asked which tasks they want to undertake via an online form, and these will be allocated fairly and added to the 12 week plan.

Customers will report back progress at regular catch-up meetings or to the Community Involvement Officer so tasks can be reassigned if not completed so the scrutiny can be completed on time.

New members can choose to observe the scrutiny and shadow or buddy-up with experienced involved customers or the Community Involvement Officer if they need support completing tasks.

4. Research

Research should help answer the determining questions that have been agreed in the scope. The results from this research and the information it gives will help create the recommendations.

Customers choose the type of research they want to carry out, to make the most of their skills and interests.

Research	Things to consider
Document Review	Who is the intended audience, customers or staff? If customer-facing, is it understandable and easily available? Does the process in the document reflect what happens in real life? Is the document in-date and relevant still?
Performance Data	What does the data show? How has performance improved / declined, and what caused the change?
Best Practice	Looking to other housing providers helps you get ideas for improvement. How do they deliver the service? How do they monitor success of their service?
Customer Surveys	There may be relevant existing data from a previous survey, if not, a survey using Microsoft Forms is a quick and easy way to get bulk information. Decide which customers to survey and what information is needed.
Customer focus groups	Setting up a focus group with the survey responders enables customers to give more detailed response. Set a framework of questions to ask. Customer focus groups are not always necessary, so consider if this will add to the research.
Staff Interviews	Staff understand their service really well so it is good to know what would help staff deliver a service better. Try to give staff as much notice as possible for interview dates.

Feeding back research findings
It is important that other customers working on the scrutiny review can understand what research was carried out, and what the findings are.

A research feedback form is used to record information found in the research. These forms are then used to collate all research findings to help create recommendations. There might be details needed such as a quote, a statistic, a web address, or the name of an organisation.

Good practise
It is really important that if your findings show good practise about the service, that you record this in the feedback form. Although good practise will often not lead to a recommendation, it is useful to hear what customers think is done well in the service.

5. Recommendations

Recommendations are made as a group and should be evidenced-based, using the research feedback forms. All of the research and findings are collated and looked at together and it should be clear which part of the research evidences the reasoning behind the recommendation. This makes sure everyone's work is used, and the group agree on what recommendations to make.

The structure of a recommendation should lend itself to tracking progress and outcomes. There should be a clear end point with tangible benefits to customers, staff or the organisation. Changes to services should be realistic, so a maximum of 10 recommendations is about right.

6. Report

The report should explain how the research was done, give background and evidence to the conclusions drawn, and ultimately list the recommendations for service changes you want to make.

The length of the report shouldn't be too long – for scrutiny reviews the report will be read by staff, our board and be available to customers to read on our website. A manageable report is around 10 pages.

Diagrams, charts, photos, screen grabs or attachments to demonstrate your findings and good practice are great for adding interest and detail to your report. The recommendations are presented at the end of the report in a table, with a method of how each one will be measured as complete.

7. Roundtable

The roundtable is an opportunity to review the recommendations with the manager of the service, the head of service and relevant director. At this meeting, specific actions relating to recommendations are agreed. This will involve detailing how the recommendations will be delivered and to what timescale.

Customers have the right to challenge timescales, or details of the response to fit the intention of the initial recommendation.

8. Action Tracking

Once the actions are agreed, these are input in to the performance management system Clearview and allocated to specific roles within the business with an agreed target date for completion.

The target dates for completion will always be at the end of a quarter; 31st March, 30th June, 30th September, and 31st December.

Scrutiny Action Tracking meetings are held at the beginning of each quarter. At these meetings, Clearview will be used to share updates and evidence of actions completed. These meetings will be led by the Community Involvement Manager and all customers involved in the scrutiny review being looked at will be invited. The manager of the scrutiny actions being tracked will also attend and talk through evidence and progress against action. These meetings will be recorded.

At Scrutiny Action Tracking meetings, outstanding actions will be discussed, with an update provided to customers via email one week before the meeting. If an extension is requested, this can be done via email to customers and does not need to wait until quarterly meetings.

Customers decide if the manager has provided adequate evidence that the action has been completed. If an action cannot be delivered on time, managers should ensure this is communicated to customers ahead of the action tracking meeting with a request for an extension.

Extensions can be granted at action tracking meetings if customers agree with the reasons for the delay.

9. Staff and customer responsibilities

Scrutiny is to be viewed as an internal audit and, therefore, staff members are to make themselves available for discussion, meetings, responding to surveys and provide information in a timely manner as requested and agreed within the scrutiny scope and workplan.

Open and honest communication and trust between staff and customers is paramount to the success of scrutiny. Any issues relating to conduct or performance of customers or staff must be raised in a constructive way, aimed at getting things right in future, and not criticising individuals.

Customers taking part in scrutiny reviews must be happy to share their email address with other customers taking part in the review to enable them to work together without staff.

The Community Involvement Officer will be responsible for facilitating the scrutiny and will work with customers to complete the set tasks below:

- Recruiting new customers
- Inducting customers new to scrutiny
- Creating the scrutiny workplan
- Organising and facilitating meetings
- Setting agendas
- Allocating tasks to customers
- Uploading documents to governor hub
- Providing weekly progress updates to involved customers and staff