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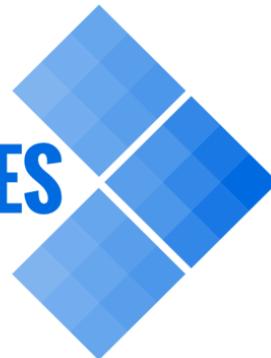
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Organisation Assessed: Merthyr Tydfil Housing Association

Prepared by Registered Assessor: Graham Walton

Report Type: Second Year Surveillance

ASSESSMENT SERVICES
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1. Key Information

Assessor Name	GRAHAM WALTON
Assessment Type	2 ND YEAR SURVEILLANCE
Project Number	PN 101432
Client ID	C15482
Method of Contact	REMOTE

2. Assessor's Findings

This 2nd year surveillance has been conducted remotely via e-mail and conducted off site. The findings have been based on the evidence provided by the Merthyr Tydfil Housing Association (MTHA). The organisation provided an extremely full and factual update for this review and this report has been based on and taken from the evidence submitted. This remote review is a mandatory requirement under the Assessment Services Ltd conditions of certification and required to retain the final year of the Customer Service Excellence Standard (CSE) certification.

2.1 Progress Made

There was one partial compliance which Merthyr Tydfil Housing Association needed to address: Element 4.1.2. They were asked to continue to address their targets on lettings and voids which are not currently being met whilst keeping their tenants fully informed of your actions and results. The following actions were taken by MTHA to ensure they complied with 4.1.2:

- The voids working group was set up to address the issues regarding the time taken to let properties and the amount of money being spent on void properties to bring them up to a re-let standard. I was shown evidence from their Balanced Scorecard which showed the Voids Working Group had had a positive effect on both the void figures and letting cost as well as bringing the expenditure and relet times back within target.
- Steps were taken to ensure the Tenant Service Standards Group (TSSG) was heavily involved in assessing and reviewing the void property standard.
- It has been possible to rent properties more quickly by allowing new tenants to use floor covering (where possible) from the previous occupier and also a redecoration allowance is paid to the new tenants rather than the Association redecorating the property where appropriate.
- In order to try and anticipate where there may be high future void costs, the Association has developed a 'property at risk' spreadsheet. This contains a list of properties where if the current tenants were to move out, the Association would incur above average costs. Tenancy Management Officers and other staff are working with these tenants to help them address these issues.

The actions taken by MTHA have moved 4.1.2 from 'partial compliance' to 'compliance'.

Below are detailed the actions taken by MTHA to address the areas for development

As part of the above you may wish to revisit your voids target as it may be unrealistic. (Elements 1.3.4, 4.1.1 & 5.3.3).

I had a detailed discussion with MTHA about the need to set targets that are both achievable and challenging. This included targets for voids as well as areas such as staff absenteeism. MTHA welcomed my recommendation that they should revisit their targets and make sure they are achievable. This remains an area for development.

You may wish to consider if and how you should give updates on co-regulation to your tenants and involve them as much as possible (Element 1.2.1).

Tenants are provided with an annual report (Merthyr Housing Annual Self Evaluation Update) to their tenants on regulation and how the Association is performing against the Delivery

Outcomes. The TSSG were consulted on the format and frequency of these updates. A further development has been MTHA signing up to Housemark which will enable them to set up and monitor their KPIs and compare their performance to other associations. This development area has been addressed.

At feedback it was generally agreed that Partner Surveys are proving ineffective and you may wish to discontinue these. The possibility of simply asking a partner for an annual score out of 10 was also discussed (reference Element 3.4.2).

The stakeholder questionnaires have been discontinued. In order to engage with contractors, meetings will be re-introduced in 2016. The meetings will be between companies who are on the MTHA approved list discuss and MTHA maintenance staff. The agendas will be around current issues and how customer services can be improved. In terms of the partner organisations MTHA works with, they no longer ask for feedback on their performance as an organisation. However they do monitor complaints to ensure there are no issues. This development area has been addressed.

Your staff have given feedback that they are not particularly fond of annual awards. Other organisations have benefited from having annual Fun Awards which avoid such categories as 'Best Employee', etc. and these have had a positive impact on morale. You may also wish to consider this approach (reference Element 2.2.4).

The practice of awarding annual awards has been discontinued. At some staff social events, fun awards have been introduced which have been well received. This development area has been addressed.

Your Tenancy Support Officers gave a clear message that they would like to be even more autonomous. They display a great sense of pride and are almost loathe referring on certain issues and would wish to be able to deal with these themselves. To achieve this there will be massive training and development issues and you may wish to look at how you can harness this desire (Element 2.1.6).

The MTHA Senior Management Team has reviewed this request for more autonomy and is fully supportive of this. In 2016, the MTHA Director of Operations will work with HR to develop training to ensure that staff are confident to become even more autonomous. This will be developed further for other groups of staff. This is still work in progress.

As part of the Year 1 Continued Compliance Review, the tenants made various suggestions to Neil Potentier, the previous CSE Assessor for MTHA. The responses by MTHA to these suggestions are detailed below:

- *The rationale and visiting implications for the change to 10-month Gas Surveys has not been fully explained:* this had been communicated to the TSSG previously, however some members may not have fully understood why the frequency was changing. MTHA has explained this to TSSG again and it is felt they now understand the rationale.
- *Adequacy of storage heaters and their possible replacement:* this relates specifically to Kevin Ryan Court. MTHA is currently in negotiations with a company to provide a Biomass boiler there. There are issues around cost and the issue will be resolved either way by January 2016 when decisions will be made whether it is feasible or not to purchase the biomass boiler. If this is not the case, other options will be taken forward.
- *Confusion between the TSSG Group and the Scrutiny Group and the possibility of merging these:* The Tenant Assessment Team includes tenants from other associations which is why it is not possible to merge these groups. The TSSG is the scrutiny group but

the Tenant Assessment Team carry out mystery shopper sessions on behalf of the Association.

- *A request for more transparency with regard to financial information particularly on its allocation:* this is interpreted as being about how budgets are set and that the TSSG wanted more information. This feedback has previously been fed back following the February Board Away Day. MTHA will seek feedback from the TSSG as to whether a midyear update on how the Association is performing against the budget would be beneficial.
- *Comments re misinformation regarding solar water pumps:* the Community Development Team has undertaken work with tenants to explain how the solar water systems work.
- *A request for a jargon buster for tenants:* an acronym list that that has been shared with tenants.

2.2 Issues Which May Affect Certification

MTHA has had various recent changes at senior level with new appointments to the Chair and Chief Executive posts. I did discuss the possible impact on MTHA's services to customers and was re-assured that customer care had not been adversely affected. I also reviewed with MTHA the move to a 'risk based approach' advocated by the Welsh Government Housing Directorate in the context of customer care. The conclusion was that it did not influence levels of customer care. It was also apparent that the redevelopment of the New Town Hall (Redhouse) had been a major achievement that had needed significant impact from NTHA senior staff. Despite this expectation, there was no evidence that ability to deliver good customer care had been influenced.

3. Additional Information

Some further areas for development were established in my review of documentation and interview with MTHA:

- Elements 1.3.4, 4.1.1 & 5.3.3: all objectives to be revisited to make sure they are achievable as well as being challenging
- Element 1.1.2: the 'How are we doing?' survey that is made available via the web site and 'The Beacon' should be re-worded to be grammatically correct
- Element 3.2.1, 3.2.3 & 3.2.4: MTHA currently produces both an 'Annual Self Evaluation Update' and an 'Annual Report' which include the same content. This could be confusing to customers and looks an unnecessary repetition. MTHA should review the value of having both and consider the benefits of merging the publications
- Element 3.2.1, 3.2.3 & 3.2.4: If MTHA decides to retain both the 'Annual Self Evaluation Update' and the 'Annual Report' it would be useful if the 'Annual Self Evaluation Update' had an executive summary and a contents page

Name: Graham Walton

Registered CSE Assessor for Assessment Service

Date: 11th January 2016

4. Compliance against the Customer Service Excellence Standard

Criterion	Sub-Criterion	Element	Non-Compliant	Partial Compliance	Compliant	Compliance Plus	
1	1.1	1.1.1			X		
		1.1.2			X		
		1.1.3			X		
	1.2	1.2.1					X
		1.2.2					X
		1.2.3					X
	1.3	1.3.1				X	
		1.3.2				X	
		1.3.3				X	
		1.3.4				X	
		1.3.5				X	

Criterion	Sub-Criterion	Element	Non-Compliant	Partial Compliance	Compliant	Compliance Plus	
2	2.1	2.1.1				X	
		2.1.2				X	
		2.1.3				X	
		2.1.4				X	
		2.1.5				X	
	2.2	2.2.1				X	
		2.2.2				X	
		2.2.3				X	
		2.2.4				X	
		2.2.5				X	

Criterion	Sub-Criterion	Element	Non-Compliant	Partial Compliance	Compliant	Compliance Plus	
3	3.1	3.1.1			X		
		3.1.2			X		
	3.2	3.2.1				X	
		3.2.2				X	
		3.2.3				X	
	3.3	3.3.1				X	
		3.3.2				X	
		3.3.3				X	
	3.4	3.4.1				X	
		3.4.2				X	
		3.4.3				X	

Criterion	Sub-Criterion	Element	Non-Compliant	Partial Compliance	Compliant	Compliance Plus	
4	4.1	4.1.1			X		
		4.1.2			X		
		4.1.3			X		
	4.2	4.2.1					X
		4.2.2					X
		4.2.3				X	
	4.3		4.2.4			X	
			4.3.1			X	
			4.3.2			X	
			4.3.3			X	
			4.3.4			X	
			4.3.5			X	
			4.3.6			X	

Criterion	Sub-Criterion	Element	Non-Compliant	Partial Compliance	Compliant	Compliance Plus	
5	5.1	5.1.1			X		
		5.1.2			X		
	5.2		5.2.1			X	
			5.2.2			X	
			5.2.3			X	
			5.2.4			X	
			5.2.5			X	
	5.3		5.3.1			X	
			5.3.2			X	
			5.3.3			X	

Criterion	Sub Criterion	Element	Non Compliant	Partial Compliance	Compliant	Compliance Plus
4	4.1	4.1.1				
		4.1.2				
		4.1.3				
	4.2	4.2.1				
		4.2.2				
		4.2.3				
		4.2.4				
	4.3	4.3.1				
		4.3.2				
		4.3.3				
		4.3.4				
		4.3.5				
		4.3.6				

Criterion	Sub Criterion	Element	Non Compliant	Partial Compliance	Compliant	Compliance Plus
5	5.1	5.1.1				
		5.1.2				
	5.2	5.2.1				
		5.2.2				
		5.2.3				
		5.2.4				
		5.2.5				
	5.3	5.3.1				
		5.3.2				
		5.3.3				