



Look Ahead
CARE, SUPPORT AND HOUSING

Customer Involvement & Co- Production Strategy

September 18 – March 2020

Nicole Njie

Customer Experience Director

September 2018

1 Purpose

- 1.1 The Customer Involvement and Co-Production strategy sets out our approach to customer involvement and co-production, in line with our values:

Excellence - We are passionate about our ability to deliver consistently excellent services that exceed expectations.

Aspiration - We are aspirational for our customers, staff and organisation. We aim high, seek out opportunities and do not shy away from the challenges we face.

Partnership - We know our organisation is stronger when we work in partnership with stakeholders, commissioners and crucially, customers. Partnership between staff and the people who use our services informs and influences everything we do.

Trust - We will be an organisation with a strong social purpose. We will be trusted by our commissioners and funders to deliver the services we say we will. We will behave with integrity and transparency.

2 Principles

- 2.1 Co-production in its purest form is an equal relationship between people who use services and the people responsible for delivering services. They work together from design to delivery, sharing strategic decision making, policy, as well as decisions about the best way to deliver services (National Co-Production Advisory Group (NCAG)).
- 2.2 The overarching strategy is underpinned by co-production values as set out in the Social Care Institute of Excellence (SCIE) Co-Production guidance:
- **Equality** – Everyone has assets and something to contribute, if provided the opportunity.
 - **Diversity** - Barriers to involvement must be recognised and proactively removed to obtain inclusion for all.
 - **Accessibility** – Opportunities must be accessible, and customers should participate in ways that suit them best.
 - **Reciprocity** – There should be clear responsibilities and reward/getting something back.

3 Strategy

- 3.1 The strategy seeks to takes a practical approach to co-production and recognises financial and commercial considerations in strategic decision

making and service design. It also recognises that customers will want to get involved and influence at different levels of the organisation. As such, a wide choice of engagement should be made available to them.

3.2 The strategy and objectives are aligned with NCAG’s Co-production ladder which sets out 7 levels of involvement below; “Coercion” has been replaced with “Empowerment”.

7	Co-production	Equal relationship between customer and organisation: Co-design, deliver, and make decisions about policy and service delivery.
6	Empowerment	Celebrating and rewarding customer involvement, successes, ideas and influence.
5	Co-design	Customers involved in designing services based on their experiences and ideas. Customers have a genuine influence but are not involved in seeing it through.
4	Engagement	Customers are given opportunities to express their views and influence some decisions.
3	Consultation	Customers are asked their opinions via surveys and meetings, but they do not have the power to influence or affect change.
2	Informing	Customers receive information about the service and how they work. What decisions have been made and why.
1	Educating	Customers are helped to understand the service design and delivery and gain the relevant knowledge.
0	Coercion	Customers attend events about the service as passive recipients.

4 **Strategic Objectives**

4.1 The strategy sets out the strategic objectives up to March 2020.

- Promote and publish involvement and co-production opportunities using a diverse range of channels.
- Keep customers updated on service changes, performance, outcomes and decisions that impact them.
- Proactively engage and consult customers on a range of topics and performance areas
- Provide a range of options to empower and enable customers express their views and opinions
- Develop opportunities to involve customers in the design and; delivery of services; performance; and staff recruitment and development.

- Champion and empower our customers, recognising their difficulties and celebrating their achievements and success.
- Cultivate and engender practical co-production initiatives at a strategic, service design and operational levels
- Develop strategies to mitigate barriers to involvement and co-production at all levels of the involvement ladder.

4.2 The strategic actions underpinning the strategy are a combination of existing approaches, improvements or new initiatives. They are indicated as follows:

Existing – **E**
 Improvement – **I**
 New- **N**

5 **Education**

5.1 Promote and publish involvement and co-production opportunities using a diverse range of channels.

The strategy will feed into the annual business planning cycle. CM's will be required to have local plans that reflect the strategy	N
JD's, on-boarding and inductions should reflect that job holders roles and responsibilities in promoting, delivering the strategy and setting the culture	I
Customer communication plan: provides up to date information and programme of customer engagement activities	N
Develop multiple education channels on line, print and through everyday support and service delivery with customers	I

6 **Informing**

6.1 Keep customers updated on service changes, performance, outcomes and decisions that impact them.

Review "In The Loop": (customer magazine) Survey customers and look at what similar organisations are providing.	N
Re-Launch "In The loop"; develop segmented copies aimed at each specialism and unsupported customers	I
Launch "You Said, We Did" customer feedback on a quarterly basis.	N
Refresh website to include performance data	N
The Tenant and Landlord Panel and Care and Support Customer forum will produce reports and publish decisions and outcomes.	N

The Customer Experience Director will produce an annual “Customer Experience” report.	N
Design Quality Audit outcomes posters and display in services following each audit ¹	N

7 **Consultation**

7.1 Proactively engage and consult customers on a range of topics and performance against our customer promises.

Conduct an annual customer satisfaction survey. Utilise findings to develop action plans; launch “You, Said, We Did”; and benchmark against other organisations	I
Use Facebook to creatively engage and consult customer opinions and obtain feedback.	N

8 **Engagement**

- Provide a range of options to empower and enable customers express their views and opinions

Quality Audit: proactively consult customers at each service quality audit and feed into customer insight intelligence	I
Design & launch complaints case management satisfaction surveys	N
Design & launch repairs satisfaction surveys	N
Develop action plans to respond to individual issues as well as trends and critical service failures (Complaints & Repairs)	N
Develop policy and guidance for recruiting managers to ensure staff recruitment has customer involvement. Develop toolkit and service user involvement menu	N
Pilot thematic “Deep Dives”: service improvement reviews including customers	N

¹ The quality rating will only be displayed where the service has been rated as good or outstanding. Inadequate or Requires Improvement posters will solely list what the service is doing well.

9 Co-design

- 9.1 Develop opportunities to involve customers in the design and; delivery of services; performance; and staff recruitment and development.

Replace the Customer Services Committee with a “Tenant and Landlord Panel” and “Care and Support Customer forum” (Appendix1,2&3)	I
The policy manager will work with customers to develop new policies and practice guides.(Develop annual plan based on policy review timetable)	I
Develop customer staff interview question bank – customers to lead	N
Recruitment to include customer involvement (menu of involvement) and reported against target on a quarterly basis	I
Pilot customer “What Happened Here” group. Reviewing anonymised serious incidents and gaining 360 insights into incident management from a customer’s prospective; using the “See, Think, Act” framework.	N

10 Empowerment

- 10.1 Champion and empower our customers, recognising their difficulties and celebrating their achievements and success.

Host an annual customer celebration event	E
Set out our customer involvement , co-production and volunteering reward strategy in a transparent policy and procedure for customer and staff	I
Develop and deliver customer support and training package to support customers involved in: Quality Audits, Recruitment & Selection, Forums and Panels	N
Develop opportunities for staff (targeting central service colleagues) to buddy and support customers to maintain engagement and attendance at forums and panels	N

11 Co-production

- 11.1 Cultivate and engender practical co-production initiatives at a strategic, service design and operational levels

Customers to deliver or co-deliver “Experts by Experience” training	E
Train and place Peer Support Volunteers to work in our services	E
Digitalise our assessment, support, risk planning and outcomes framework. Explore feasibility of a customer App to provide greater control and choice for customers	N
Stage 3 complaints panels should have 2 customer representatives.	E
Customer Quality Checkers audit services alongside the quality team	I
We will empower customers to undertake an independent business/service review every 2 years.	N

12 Inclusion

- 12.1 Develop strategies to mitigate barriers to involvement and co-production at all levels of the involvement ladder.

Develop strategy to engage hard to reach customers	N
The customer experience team will work with the Deputy Director of Learning Disability and customers to engage customers with Learning Disabilities	N
Develop strategies to reduce geographical barriers when planning and organising involvement opportunities	N
Develop digital and social media channels	

13 Key Deliverables

- 13.1 The strategy sets out 6 new KPI's

80% of all staff recruitment must have some form of user involvement by March 2020

40% of all Quality Audits will have a Customer Quality Checker on the audit team at the end of quarter 4 each year. (Excluding Service implementation, follow up, or) regulatory or retender Audits)

100% of all stage 3 Complaints Panel will have at least 1 customer representative

100% of stage 1 complainants will have the opportunity to feedback their satisfaction with the complaints management process by April 2019

We will seek feedback from customers and staff on at least **50%** of repair jobs by April 2019

Meet **85%** of our Peer Support Volunteer contractual obligations by March 2020

13.2 The strategy also aims to have:

- Recruited and selected a minimum of 8 Tenant & landlord reps by June 2019
- Recruited and trained a Care and Support Customer Forum” customer Co-chair by June 2019
- Recruited and trained 16 Quality Checkers by March 2019

14 Delivering the strategy

14.1 The delivery timetable is set out in **Appendix 4**

14.2 The Customer Experience Director is responsible for the overall delivery of the strategy in conjunction with operational, people and communication business leads.

Progress against the strategic action plan will be reported to SLT and SMT.

14.3 Delivery will be impacted and reliant on:

1. Recruitment of a Co-production project lead
2. Customer reward budget
3. Customer communications plan

14.4 The strategy will be delivered in conjunction with the Customer Insight strategy

15 Review and Monitoring

15.1 This list of strategic actions (section 4) are not exhaustive, and be subject to a strategy refresh over the next 12 months to take into account lessons learnt and customer feedback.

Appendix 1 Tenant and Landlord Panel Terms of Reference

Objectives

- Provide Tenants with effective and challenging governance arrangements.
- Develop a safe forum for tenants to provide constructive feedback to help review and challenge organisational performance in relation to property, landlord, housing management, and agency partnerships.
- Create a safe and responsive environment which allows and supports Tenants identify options for service improvements and efficiencies.

Function

The Tenant and Landlord Panel will meet quarterly and comprise:

- Board Chair
- Director of Housing and Support
- 8 Elected customers (Tenants) representing Hostels, Supported Housing, Unsupported, and customers residing in other landlord properties.

The panel will report to SLT and Board through the Board chair and the Director of Housing and Support.

The panel will be responsible for scrutinising performance in relation to:

- Repairs
- Voids
- Compliance
- Evictions
- ASB
- Voids
- Satisfaction- Repairs, maintenance and landlord and housing related complaints

Reports should be presented in easy read formats in advance of the meeting.

Appendix 2 Care and Support Customer Forum Terms of Reference

Objectives

- Provide a safe forum for customers to provide constructive feedback to help review and challenge organisational performance in relation to care and support service delivery.
- Develop a safe and responsive environment for customers to help identify options for service improvements and efficiencies related to care and support service delivery.
- Provide opportunities for customers to actively inform and engage. Lead on bottom–up service reviews.
- Provide a menu of opportunities which promote and support better tenant engagement and empowerment, and contribute to the development of independent and work-readiness skills for customers.

Function

The forum will meet quarterly.

The customer co-chair will be supported by the Customer Experience Director to report to SMT and SLT.

The forum will report to Board through the Board Chair and Director of Care.

The forum will comprise:

- Customer Chair
- Board Chair
- Director of Care
- Customer forum members (open invitation). Awareness campaigns will aim to ensure customers are represented across the 4 specialisms and floating support.

The customer will lead on developing agendas and scrutiny areas. The group may wish to look at the following areas:

- Quality
- Safeguarding
- Customer Outcomes
- Staff turn over
- Use of PSA and Agency
- Customer Satisfaction
- Customer Contact Centre – customer care
- ETE pathways

- Financial and Digital Inclusion
- Staff training and skill matrix

Reports should be presented in easy read formats in advance of the meeting and may include:

- Customer Surveys results and analysis
- Complaints reports
- Quality Report
- Safeguarding report
- Co-production reports
- Customer Experience annual plan
- Case studies
- Presentations

Appendix 3 Tenant & Landlord and Care & Support Customer Forum- Implementation Timeline

- Agree budget- October 2018
- Meet SCIE to explore possible consultancy support- November 2018
- Recruit co-production lead – November 2018
- Develop role profiles for tenant’s panel members – November / December 2018
- Develop training and support package – January - February 2019
- Awareness and Promotion campaign (Tenant & Landlord) – January 2019
- Awareness and Promotion campaign (Care & support Customer Forum) – February 2019
- Recruitment & Selection (Tenant & Landlord) – February 2019
- Recruitment & Selection Chair Care & support Forum – March 2019
- Training Tenants (Tenant & Landlord) – March 2019
- Training Customer chair – April 2019
- Training Board and Executive lead March - June 2019
- Produce easy read reporting information - March 2019
- First meeting by the end of quarter one 2019/20 (Tenant & Landlord)
- First forum by the end of the second quarter 2019/20 (Care & Support Customer Forum)

Appendix 4 Strategy Timeline

		2018				2019												2020		
		Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec	Jan	Feb	March
Resource	Identify resource requirements	█	█																	
	Budget sign off			█																
	Recruit Co-Production Project Lead			█	█															
Education	The strategy will feed into annual business planning cycle. CM's will be required to have local plans that reflect the strategy						█	█												
	Job Descriptions, On boarding and Inductions should reflect the job holder's roles and responsibilities in promoting, delivering the strategy and setting the culture.				█	█	█													
	Develop a customer communication plan that provides up to date information and programme of customer engagement actives				█	█														
	Develop multiple education channels on line, print and via everyday support and engagement				█	█														
	Develop service user engagement & co-production data base to identify											█	█	█	█					
Informing	Review customer magazine "in the Loop": survey customers and look at customer offer in similar organisations	█	█																	
	Re-launch Customer Magazine "In The Loop" and develop copies targeted at each specialism and unsupported customers				█															
	Launch "You Said, We Did" and publish quarterly									█										
	Refresh website to include performance data								█	█	█									
	The Tenant and Landlord Panel and Care and Support Customer forum will produce reports and publish decisions and outcomes.											█			█			█		
	Produce annual customer experience report																		█	█
	Design Quality Audit outcomes poster and display in services					█														
Consultation	Conduct an annual customer satisfaction survey and use results to develop action plan and launch "You, Said, We Did" and benchmark against other organisations						█	█	█											
	Use Facebook at creatively consult with customers								█											
Engagement	Quality Auditors will actively consult with customer at each audit					█														
	Design and launch complaints satisfaction surveys						█	█												
	Design and launch repairs satisfaction surveys						█	█												

		2018				2019								2020						
		Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec	Jan	Feb	March
	Develop action plans to respond to individual issues as well as trends and critical service failures (Complaints & Repairs)											█			█			█		
	Develop policy and guidance for recruiting managers to ensure all staff recruitment has customer involvement. Develop toolkit and service user involvement menu				█	█														
	Undertake customer selection and recruitment involvement satisfaction surveys											█			█			█		
	Pilot thematic desktop service improvement reviews including customers																		█	
Co-design	Replace the Customer Services Committee with a Tenant & Landlord Panel and a Care & Support Customer Forum									█	█	█								
	The policy manager will work with customers to develop and review policy and practice guides - Develop plan							█	█											
	Develop a customer staff interview question bank with customers					█														
	Recruitment to include customer involvement (menu of involvement) and reported against target on a quarterly basis				█			█	█											
	Pilot customer "What Happened Here" group. Reviewing anonymised serious incidents and gaining 360-degree insight from a customer perspective: utilising See, Think, Act framework												█			█				
Empowerment	Hold an annual customer celebration event						█	█												
	Set out our customer involvement, co-production and volunteering reward strategy in a transparent policy and procedure for customer and staff				█	█														
	Develop and deliver customer support and training package to support customers involved in: Quality Audits, Recruitment & Selection, Forums and Panels			█	█	█	█	█	█	█	█									
	We will develop opportunities for staff (targeting central service colleagues) to buddy and support customers to maintain engagement and attendance at forums and panels				█	█														
Co-production	Customers to deliver or co-deliver "Experts by Experience" training	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
	Train and Place Peer Support Volunteers in our services	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
	Digitalise our assessment, support planning, risk, and outcomes framework. Explore feasibility of a customer app to achieve greater control	█	█	█	█	█	█	█	█	█	█	█	█	█						
	Stage 3 complaints panels should have 2 customers on the panel	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█

		2018				2019												2020		
		Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec	Jan	Feb	March
	Customers Quality Checkers to undertake quality audits along side the Quality team																			
	Empower customers to undertake an independent business/ service review every 2 years.																			
Inclusion	Develop strategy to engage hard to reach customers																			
	Develop Strategy to engage customers with Learning Disabilities																			
	Develop strategy to reduce geographical barriers to engagement																			

