

# Briefing Note



**Subject: Sovereign Housing Group's approach to Service Delivery Performance and Continuous Improvement**

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## **1 Introduction**

The purpose of this note is to respond to the TSA's request for a report on performance improvement in relation to services to tenants. This report outlines the performance and service improvements for 2008/09; the approach to continuous improvement through the 'Orion' project and how feedback is used from tenants and staff to continually improve services. It is also intended to demonstrate compliance with Regulatory Code 3.2 and 3.3.

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## **2 Service Delivery Performance**

### **2.1 The Group**

The SHG Board (Parent) receives performance reports covering key operational and contextual (finance, IT and HR) performance indicators. A copy of the performance management outturn report for 2008/09 is attached. (SACS - Appendix 4)

Quarterly performance indicators are distributed to all Boards and more detailed bespoke reports are supplied as required on areas such as anti social behaviour housing management and repairs performance.

### **2.2 Benchmarking**

All Group Associations are members of HouseMark and actively benchmark across the sector to try and improve the services offered, with the aim of achieving upper quartile results. As a Group, Sovereign benchmarks nationally and against the over 5000 peer group. Additionally, performance is compared with other associations on a more local basis in the South East and West. In addition to scrutinising PIs, benchmarking is undertaken with associations considered to be good performers in specific areas. The outcome of the Status Survey is also benchmarked.

### **2.3 Performance Reporting within the Subsidiaries**

All members of the Group report performance to the respective Boards of management on a quarterly basis. All reporting frameworks provide a transparent and comprehensive view of the performance of an organisation using different data sources and giving the Board a holistic view of the business. The areas covered include customer/service user information, value for money and financial viability indicators and internal management/human resource management indicators.

All performance indicators are accompanied by a narrative, highlighting on an exceptions basis any key issues arising from the PIs. They also include trend analysis and performance against targets and benchmarks. In instances where the PI has deteriorated and may have a detrimental effect on the business, a narrative is provided outlining what corrective action is proposed or has already been taken.

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### **3 The Group Approach to Continuous Improvement**

#### **3.1 Strategic Approach**

The Group Strategic Plan 2008-11 (GSP), approved in 2008, builds upon the Group wide Continuous Improvement Strategy which was developed and approved during 2007/08. It further embeds the approach to continuous improvement through a number of key goals, which are aimed at improving the way the Group works and the services delivered.

The following key goals within the GSP directly relate to continuous improvement and service improvement to tenants:

- **Better services:** The goal is to develop and improve the services offered, to achieve 85% overall satisfaction with services by 31/3/11, and upper quartile performance for 90% of agreed service KPIs by 31/3/11. These goals are embedded into all subsidiary action plans.
- **Better neighbourhoods:** The goal is to continue to improve neighbourhoods so that 80% of residents are satisfied with their neighbourhood as a place to live and 55% are satisfied with the support provided to deal with ASB by 31/3/11
- **Better homes:** The goal is to improve homes so that 90% of residents are satisfied with the overall quality of their home by 31/3/11
- **Better lives:** - The goal is to make sure that services reflect the communities varied needs, achieving 70% satisfaction that residents' views are being taken into account, and seeing no significant variation in overall satisfaction levels for diversity groups, by 31/3/11
- **Consistency:** The goal is for the Group to become more effective by sharing best practice across all areas of work. By 31/3/11, high common standards for 90% of service will have been set and delivered.
- **Efficiency:** The goal is to review all services and organise them to achieve improved service quality and/or reduced overall costs by 31/3/11

Given the changes in the Group's operating environment the Board will be reviewing strategy and targets in Q3 2009/10.

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### **4 Service Improvements in 2008/09**

- 4.1 The Group works closely with residents to help influence shape and improve services by offering a wide range of involvement opportunities. Specific examples demonstrating how residents have shaped services are included within the Self-Assessment Compliance Statement (SACS – Appendix 2)

## **4.2 Resident involvement in Service Improvement**

### **4.2.1 Strategic influence**

The Group Strategic Plan (GSP) has been influenced by resident feedback and by resident Board members. Although it has not been through a formal resident consultation process it provides opportunities for specific pieces of targeted work with the Group Residents Forum (or a similar group).

A Group Residents' Forum (GRF) has been created to ensure that residents are A) involved at the highest level of decision making and that B) the Group's strategic direction reflects the needs and aspirations of the customer. The GRF comprises up to 16 members from subsidiaries across the group. The Forum's key responsibilities include scrutinising performance, service delivery and customer feedback.

### **4.2.2 Residents influence in respect of the Orion Standards**

The external view of service is embedded into the standards using resident feedback information that has been gathered and consulted on through a range of initiatives including:

- Focus Groups
- Estate Forums
- Quality Action Groups
- Customer Feedback
- Mystery Shopping
- Resident Inspections
- Neighbourhood Days
- Challenge Events
- Status Survey

Additionally the GRF will support the peer review programme within the Orion project. Specifically it will scope each service peer review based on performance data, customer feedback and value for money and scrutinise the outcome of all reviews, monitoring progress against the relevant action plan.

## **4.3 Embedding Good Practice**

The Group Performance Team has responsibility for policy development and on a regular basis it monitors good practice across the sector, making changes to policies and procedures as required. Additionally each peer review will include a review of current best practice. This is to ensure the process is dynamic, identifying best practice in the sector and prompting standards to be reviewed and possibly amended in the light of new developments in the sector.

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## **5 The Orion Project**

### **5.1 The Overview**

In response to the strategic goals outlined above, an innovative group wide project has been set up known as the Orion Project. It is designed to support service improvements across all subsidiaries to provide a holistic approach across the organisation, encouraging greater contact and team working across the Group. The process has been developed in house, drawing on the knowledge and experience of all managers across the business and is facilitated and managed by the Group Performance Team. A core part of the project is the Peer Review which is intended to provide a 'quality circle' approach to continuous improvement and strategic service planning.

### **5.2 Orion's Aims and Objectives**

1. To set and maintain service excellence standards across the business, using the Audit Commission's KLOEs as a base and identify good practice as outlined in Good Practice Guidance and Audit Commission Inspection reports
2. To embed a culture of continuous improvement into service standards across the Group, and support each subsidiary to deliver their actions to meet the service standards set within the Orion Project
3. To involve customers, residents and stakeholders within the Sovereign Housing Group, their role being to provide feedback, challenge service delivery, shape service direction and priorities for the future
4. To facilitate effective sharing of best practice in service delivery across all operational areas; both within and outside the Sovereign Housing Group, and develop a model that cascades best practice throughout all subsidiaries
5. To ensure standards are consistently delivered; and offering value for money

### **5.3 How it works**

All Associations within the Group have collaborated to collate and agree on 365 service standards. These standards were determined by the KLOEs and also knowledge of best practice within the sector. Service delivery teams within each Association have undertaken a gap analysis covering each functional area e.g. tenancy and estate management services and cross cutting functions such as Value for Money and Equality and Diversity, which involved a self assessment of performance to provide a baseline position.

In response to the gaps identified, action plans have been developed for each service area; some actions are specific to each individual organisation whilst some are Group wide.

The Orion process is supported by the Group Performance Team which acts as a 'critical friend' in assessing progress to deliver the actions that will meet the Orion service standards by:

- Ensuring the 'gap analysis' accurately reflects the delivery of services against the standards set;
- Ensuring action plans are SMART and are meeting the objectives;
- Gathering customer feedback for key service areas for each organisation, comparing feedback and analysing trends;
- Gathering performance data and analysing trends, comparing delivery against service targets set;
- Comparing performance and customer satisfaction against the 'Best in Sector' organisations.

#### **5.4 Peer Review**

To assess the performance of the Associations, a Peer Review Process has been developed to embed continuous improvement. This offers a dynamic approach to analysis and objective review of service areas and can be implemented flexibly focusing on specific service areas.

Peer review will be carried out by managers of the different associations and residents. To support residents and enable them to participate fully in the peer review process, an independent training programme for residents has been introduced, which is being delivered by Housing Quality Network.

In addition to delivering service improvements, peer review is seen as a tool to bring managers from different parts of the organisation together, to learn from each others experience and develop informal contacts and links.

The peer review process is due to commence in Autumn 2009.

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## **6 Performance Feedback**

### **6.1 Customer Feedback**

Positive and negative customer feedback is encouraged and includes:

- Complaints
- Compliments
- Suggestions
- Formal satisfaction gathering through surveys
- Comments made during interviews, visits, meetings or focus groups

Feedback is used to:

- Test and challenge service standards
- Inform Service and Policy reviews
- Plan future services
- Achieve Governance and Accountability

## **6.2 Learning from Customer Feedback – The Status Survey**

In November 2008 a Group Wide Status Survey was undertaken. Its purpose was to gauge residents' views on services and understand their priorities for the future. The Status Survey was positive with overall satisfaction, with the service for the Group being 82%. Tenants did however identify issues of concern and in 2009/10 improvements to services to address these issues will be reviewed.

## **6.3 Learning from Customer Feedback – The TSA National Conversation**

Staff and residents have attended events relating to the National Conversation, both nationally and locally, and will be engaging in future events and commenting on the new standards. In particular, the Group has three methods of feedback to assist the TSA fine tune the draft standards.

Between now and September 2009 the Group will:

- Hold meetings with all Resident Board members and members of the Group Resident Forum to consult on the discussion papers and the framework to get their views from a strategic perspective.
- Consult a wider group of residents using existing engagement methods... These include service improvement panels, focus groups and quality action groups.
- Send out a discussion papers along with feedback forms to residents who have previously had engagement with the TSA consultation.

## **6.4 Learning from Complaints**

Customers can make complaints in writing, by telephone, in person, by e-mail, by fax or by using our customer feedback forms. Trends in respect of complaints and compensation payments are analysed and the service improvements made as a result of complaints and compensation are recorded. This information is published on the Group intranet.

**Outcomes:** Changes in policies and practices arising from complaints include improving defect procedures post handover; improving clarity in respect of rent increases for people that undertake a mutual transfer; improving information to residents in respect of planned works

## **6.5 Use of Customer Profiling**

As a housing provider it is recognised that understanding the diverse needs of residents, which in turn will help shape future services, is essential. Information is collected about tenants when a property is let and when a tenancy audit is undertaken. Residents profile information at different levels can be broken down, for example by local office area and down to individual Housing officer patch. Data is also being collected on diversity including; age; disability; ethnicity; gender; religion or belief; sexual orientation; transgender.

## **6.6 Staff Ideas, Bright Ideas Scheme (BIS)**

Between November 2007 and October 2008 116 ideas were received in relation to service improvements from 73 different people from across the business (13% of all staff). Suggestions were mainly around improving efficiency and effectiveness regarding how the Group works. The outcomes included the introduction of an employee recognition scheme; video conferencing between offices; car pooling and team volunteering days for work in the local community.

The scheme was time limited and was closed in October 2008. However any further suggestions will be considered and progressed by Managers and Directors.

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