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| **Deep Dive – Complaints – Scoping Session**  held on Friday 22 March 2024  in the Board Room, Emperor House, Sunderland SR3 3XR | | | |
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| **PRESENT** | | **IN ATTENDANCE** | |
| Brenda **(BN)**  David **(DB)**  Michelle **(MW)**  David **(DW)**  John **(JM)**  Angela **(AD)**  Doreen **(DR)**  John **(JD)** | | Lewis Walmsley **(LW)** – Customer Engagement Lead  Kerry Leng **(KL)** – Director of Marketing & Engagement | |
| **APOLOGIES** | |  | |
| Margaret (MS)  Stephanie (SC)  Billy (BC)  Brian (BT)  Jane (JS)  Gladys (GG)  Phil (PH) | |  | |
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| **PARA** |  | | **ACTION** |
|  | 1. **Introduction to Session** | |  |
| 1 | LW completed introductions and provided information on Gentoo’s approach to Scrutiny. LW explained Customer Committee made the decision to disband the old Scrutiny Group (known as USTOO) in January 2024. LW explained Scrutiny can be defined in different ways and Gentoo want to ensure it is accessible for all. LW advised Gentoo would be completing scrutiny via:   * Deep Dives * Task & Finish Groups * Policy Reviews   LW explained some members of the Customer Committee were present for the Deep Dive, this was because members were still customers, and if they wanted to contribute to scrutiny activities, they should be able to do so. LW advised everyone would be treated equally.  LW explained the scoping session was an opportunity for those customers present to have their say and Gentoo would facilitate the sessions. It was advised the aim was to complete one deep dive per quarter where possible. | |  |
|  | 1. **Tenant Satisfaction Measures** | |  |
| 2 | LW explained Customer Committee wanted to focus on complaints as the first deep dive following the latest Tenant Satisfaction Measures (TSM’s).  LW advised scores in other areas, including overall satisfaction, was in the 70% - 80% bracket. However, one score which remains consistently lower, is the ‘satisfaction with our approach to complaint handling.’ LW explained Quarter 3 results show the score at 42%.  LW & KL explained the reasoning for this does not sit specifically within the Customer Voice Team, who handle the formal complaints. However, relates to those customers who have expressed dissatisfaction with staff members across the business, and feel their concerns were not dealt with.  LW provided examples such as customers reporting anti-social behaviour to Neighbourhood Co-ordinators or simply reporting a repair to an operative within the Customer Service Centre, which may be outstanding.  LW explained TSM scores are low nationwide, therefore Gentoo were not the only Housing Association experiencing lower scores regarding complaint handling. Regardless, LW explained the scores were not good enough for Gentoo and improvement was required. LW advised Gentoo need to ensure the complaint channel is as straightforward and accessible as possible.  LW asked if anyone present had previously made a complaint. JM confirmed he had and felt as though he had not received a good experience. JM confirmed he had exhausted the groups complaint process after remaining dissatisfied with the outcome at Stage 1 & 2 and took his complaint to the Housing Ombudsman, however, they would not accept his complaint due to it being outside of their jurisdiction. LW acknowledged the concerns JM was making and asked how he found the overall process. JM advised he could not fault the handling of the complaint as it was timely and responses were provided at Stage 1 & 2. However, feels issues are still unresolved. LW confirmed he would review and see if further advice can be provided [1]  In the interim, LW pointed out the example JM provided, was an indication as to why scores are lower. LW advised Gentoo could handle a complaint perfectly, however, if a customer does not receive the desired outcome, they will continue to remain dissatisfied which reflects within the TSM scores.  MW asked about the different options available for customers who exhaust Gentoo’s complaints process, and feel as though a sufficient answer has not been provided from the Housing Ombudsman. LW explained if Gentoo are confident they have done all they can and cannot reach a satisfactory answer for the customer, they could either appeal the Housing Ombudsman decision or seek independent legal advice. BN asked if anyone has appealed a decision before. KL confirmed there has been one appeal we are aware of.  DB asked if most of the customers who take part in the TSM’s, have made a formal complaint. KL advised Gentoo believe most of the complaints are informal, which means the Customer Voice Team may be unaware of these.  DB asked if Gentoo feel there are gaps within their formal complaint process, as customers were previously involved in the creation of the complaints and compliments policy. LW advised the policy is very detailed, to the point where a booklet was created providing a more simplified explanation. (All members were provided with a copy of the booklet during the session).  JD queried the definition of a complaint, explaining a customer could raise concerns about parking in the street, which they may view as a complaint. JD advised in his view this would not be a complaint because it is outside of Gentoo’s jurisdiction, however asked if this could impact the complaint handling score.  LW & KL advised it could, as Gentoo cannot control what an individual raises as part of the TSM conversation. JD advised the group need to know the complaint handling figure is an accurate representation, based on real complaints. LW explained the question IFF ask (who complete the TSM surveys) are open ended, meaning they will only take the customers word.  JD advised this is a false negative and the figure is never going to be accurate. DB asked if Gentoo keep a log of discussions, i.e. where signposting is provided. LW confirmed staff members should be logging discussions on an customers account stating the context and what guidance has been provided.  KL advised the group it may be an area they wish to investigate, with regards to informal complaints.  JM advised Gentoo should be looking at the reasons why the customer is making a complaint, not increasing a percentage, which would naturally occur when dealing with the concerns.  MW asked when the operator at the Contact Centre receives a call, would they ask the customer if they wish to make a formal complaint. LW advised it would depend on the circumstances of the call. For example, if a customer contacts Gentoo and advises they wish to submit a complaint, due to a hole in the roof, however, the report is the first time Gentoo are aware of the issue, it would be defined as a first-time service request and not a complaint. On the other hand, a customer could call Gentoo and state they wish to make a complaint because they have reported a hole in the roof several times, with no action being taken. LW confirmed this would then be accepted as a complaint.  MW asked if a complaint can be left open until its resolved. KL advised Gentoo must comply with the Housing Ombudsman Complaints Handling Code and it may be an idea for the group to review this [2]  KL explained Gentoo have 10 days to investigate a complaint and provide a formal response. Therefore, once Gentoo have an answer, the complaint must be closed. KL explained Gentoo cannot necessarily wait for the actions to be completed. KL advised if the actions are outside of the 10 days, it would be the Customer Voice Partner’s responsibility to ensure a satisfactory outcome is provided. KL advised in the past Gentoo have mistakenly kept cases open, until they were fixed. This is because it felt the right thing to do, however on reflection, this was not compliant with the code.  DB asked if complaints are categorised, therefore, Gentoo can identify trends as to the most common types of complaints received. KL confirmed Gentoo do this. DB asked what the most common complaints are. LW advised most formal complaints are due to repairs & maintenance, mainly around roofs (water ingress) and damp & mould.  BN advised there are two different issues. There are complaints and customer comments and it seems Gentoo are identifying the comments as complaints. DR agreed with this and provided an example of when she has expressed dissatisfaction, however not necessarily raised a complaint. BN asked if Gentoo would look at the most common types of comments and bring this to the group [3]  LW advised Gentoo class comments as an ‘Own it Fix it’. Therefore, a customer does not have to go through our formal complaints process, as a member of staff takes responsibility for a particular concern a customer is experiencing and deals with it from beginning to end.  KL advised it’s an area where Gentoo can make a big difference, however, need to get this right, which this starts with all colleagues taking accountability. MW asked if staff members do not log ‘Own it Fix it’ and because of this, may forget to contact a customer back which causes a situation to escalate. LW advised this has happened in the past and with Salesforce being introduced, all contacts should be logged.  JD advised the group have a deep dive within a deep dive, as need to consider the process and the decision making from those staff members who are dealing with a customer concern. The group agreed it would be beneficial to look at this. JD advised if the group can get that aspect right, satisfaction should be increased. DB asked if the operators in the Contact Centre have a script, in which they can read from. LW explained they do not, as it would be complex depending on the different situations which can occur. LW advised complaint training is going to be enrolled to those customer facing colleagues, therefore everyone understands their role and responsibility when it comes to this.  JM asked if a telephone line could be introduced for complaints. [4]  JD believes the group need to start from the ground up and to do this, they need to understand how many of the complaints received as part of the 42% have no bearing on Gentoo as this creates a false narrative. For example, remove those complaints around grass cutting, parking, rubbish in streets.  KL explained the figures gathered are mainly from customers who have submitted informal complaints and the biggest impact the group can make is to resolve that aspect.  BN asked if the Contact Centre are now using Salesforce, as the introduction of this system should ensure all contacts are logged, weather this be a formal complaint or an own it fix it. LW confirmed the system is now in place with all colleagues now using this. AD asked if the group could see a mock set up of Salesforce so we can see the system in action [5]  DB asked if the recommendations could be found from when they provided feedback on Salesforce a few years ago. LW advised he would investigate this [6]  LW asked if the group need to review the complaints policy, alongside the complaints section on the website. MW advised more customers need to be aware of the Housing Ombudsman and the support they can provide customers. LW showed the group the complaints page on the Gentoo website which explains how customers can make a complaint, alongside the role and responsibility of the Housing Ombudsman. LW explained this information is duplicated in the booklets as Gentoo are trying to ensure it is accessible for all customers. The group agreed the booklets are insightful and useful and should be made available at all area offices, as well as on notice boards to ensure the information is pushed out.[7] JD also mentioned the leaflets could be added into the sign-up packs [8]  AD asked if the complaint leaflet could be added into the Rent Statement. LW explained, Gentoo would like to keep the statement specific to a customer’s rent account, as that is the feedback received from customers. However, we could advertise the leaflet within 23/24 Customer Annual Report.  KL mentioned from Ombudsman feedback, we are going to enrol Complaint Drop-in Sessions, meaning customers can meet with us to discuss concerns, as well as discussing any other aspects of a customer’s tenancy. [9]  JD advised the key takeaway from the conversation today is that all customers must be responded too.  MW advised there have been experiences where a tradesperson has attended their home and was unsure what they were there to do, until they were informed from themselves. LW explained a tradesperson relies solely on their handheld and the information, which is provided from the Contact Centre, therefore, it is the responsibility of the operative taking the repair, to ensure as much information is logged regarding the job as possible.  BN asked if there was a timescale for the deep dive. LW explained the regulator will be attending a deep dive at the end of May and would like to see actions agreed by this point. BN advised there is the potential for this deep dive to grow, depending on the information the group find out as the deep dive continues. KL confirmed it is up to the group to determine how long the deep dive goes on for. BN asked will Gentoo listen to what customers have to say. LW & KL confirmed they would. MW asked if ideas would be implemented. KL confirmed where possible they would, where not possible, an explanation will be provided as to why.  LW advised from the discussions being held, it feels the deep dive will focus on the informal complaints. The group agreed the formal complaints procedure is strong, however it’s the informal side we need to look at.  DB advised it will not be an easy task, simply because there’s so many different aspects to it. DB advised a greater understanding of Salesforce would be beneficial.  BN advised it would be helpful to understand the role Jewson’s play in the delivery / stock of materials for the trades, as it is a common theme that works couldn’t be completed due to not having correct materials / materials not being available. It was agreed LW would see if that is possible. [10]  DB advised this deep dive will need to be split into different sections, and then try to bring it together at the end.  JD reiterated the group do not need to look at the policy / formal complaints process etc. However, look at the themes which are largely causing the areas of dissatisfaction. For example:   * Wrong Tradesmen attending customers’ homes. * Repairs not being completed correctly first time. * Materials not being available for repairs.   MW advised if we could do this, the complaint handling score should increase.  LW confirmed with the end of the financial year upcoming, we will review the most common causes of complaints and centre the deep dive on this. LW acknowledged the themes will likely revolve around the discussions taken place today, however it would be helpful to get colleagues from R&M in this discussion so further context can be provided [11]  KL advised we should start with the Contact Centre and look at the process. [12] The group agreed and advised some shadowing would be beneficial. LW to speak with Governance to see if this is possible. DR, DB & BN advised they will be doing shadowing as part of the Customer Committee and will provide feedback on their experience. [13]  KL advised to recap the next steps are:   * Complete session around the Contact Centre and the process they follow from logging the call and reporting a repair. * Look into the key themes from the complaint information once this has been gathered. * Look at how we advertise and communicate our complaint channels.   **Date for next Deep Dive Session:**  Friday 26 April 2024 between 10:00am – 12:00pm at Emperor House Board Room | |  |

**ACTION LOG**

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| **KEY** |  |  |
|  | Action completion overdue |  |
|  | Action ongoing and date not due |  |
|  | Action complete |  |

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| **ACTION REF** | **DETAILS** | **RESPONSIBILITY** | **TARGET COMPLETION** | **STATUS** |
| 22/03/24 – [1] | Review John’s complaint and provide feedback. | Lewis Walmsley | 01/05/24 | Conversation will remain between Gentoo and John. |
| 22/03/24 – [2] | To decide during next meeting if some of the group wish to review the Housing Ombudsman Complaint Handling Code against the Group’s self-assessment form. | Lewis Walmsley | 01/05/24 | To decide on 26.04.24 |
| 22/03/24 – [3] | Present the common themes from the last financial year via complaint data. | Michael McGuigan | 01/05/24 | To review on 26.04.24 |
| 22/03/24 – [4] | Could a direct line be provided to the Complaints Team | Michael McGuigan | 01/05/24 | We encourage all staff to ‘own it fix it’ and where not possible, direct a customer to the Customer Voice Team for a formal complaint to be raised. If a direct line was introduced, the team would be inundated with requests, which may not necessarily be complaints. Customers can raise concerns via 0191 525 5000, should they want to raise a particular issue. |
| 22/03/24 – [5] | Provide a demonstration of Salesforce and how this is used within the context of the Contact Centre to submit formal complaints / own it fix it | Lewis Walmsley | 01/05/24 | To review on 26.04.24 |
| 22/03/24 – [6] | Identify document where customers have previously provided recommendations on Salesforce | Lewis Walmsley | 01/05/24 | Having completed a thorough search, I have been unable to identify this document. |
| 22/03/24 – [7] | Ensure the Complaints and Compliments Leaflet is advertised in offices and communal noticeboards | Lewis Walmsley | 01/05/24 | A poster is being created to advertise complaints for communal noticeboards. The leaflet will be added to area offices |
| 22/03/24 – [8] | Ensure the Complaints and Compliments Leaflet is added into sign up packs | Lewis Walmsley | 01/05/24 | An order has been placed for the leaflet to be added to all sign up packs going forward. |
| 22/03/24 – [9] | Create a list of dates for Complaint Drop-in Sessions | Lewis Walmsley / Michael McGuigan | 01/05/24 | A date has been set for 22.05. We will trial the session within Washington before considering other areas. |
| 22/03/24 – [10] | Look into the possibility of Jewson’s attending a future session, depending on the information from complaint themes | Lewis Walmsley | No Date | This will depend on direction of Deep Dive |
| 22/03/24 – [11] | Look at R&M colleagues taking part in Deep Dive when discussing themes | Lewis Walmsley | No Date | This will depend on direction of Deep Dive |
| 22/03/24 – [12] | Focus next Deep Dive Session on the Customer Contact Centre | Lewis Walmsley | 01/05/24 | Representation from Contact Centre will be at the meeting on 26.04 |
| 22/03/24 – [13] | Could customers shadow the Contact Centre | Lewis Walmsley | 01/05/24 | Due to General Data Protection Regulations, this is not something we can offer. |