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Customer services centre

Report of the overview & scrutiny committee

March 2008



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Foreword

1. As chair of the committee I would like to acknowledge how much our work on scrutinising the customer services centre (CSC) has been supported and welcomed by council officers responsible for development of the centre and by the contractor who provides the service. It appears to the committee that the council's officers and the contractor, Vangent, have built a close and constructive partnership and have been willing to listen to concerns raised both by ourselves and more widely, for instance by community councils and tenants' and residents' associations.
2. Much of this review has been undertaken "in conversation" with the council's officers and the contractor. As a result of this, I feel, many improvements have already been introduced in areas identified by us as being of concern. Some of the issues we first raised have been addressed while the review was still ongoing. Improvements have been initiated in tandem with and to some extent as a direct consequence of our review. While our review outlines ongoing areas for development, we have tried as much as possible to recognise the positive changes that have been made over the past year and to take account of them in our final recommendations.
3. Members of the committee particularly valued our visits to the CSC, allowing us, as they did, the opportunity to meet with staff and to fully appreciate the complexity and demands of their roles. The members of staff we spoke to impressed us with their enthusiasm and commitment, whether working as operatives on the telephone lines, as managers or in the newly created housing repairs control centre. In our view, to maintain an excellent service it is essential to provide staff with appropriate and ongoing training and to encourage individual development and progression.
4. I hope that our final report can be seen as recognising improvements already made in the CSC, drawing attention to areas for continuing review and introducing an aspirational element for ongoing development of this vital front-line service.

Councillor Fiona Colley
Chair, Overview & Scrutiny Committee

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Introduction

5. This report sets out recommendations arising from the overview & scrutiny committee's review of the council's customer services centre (CSC).
6. Some of the areas of concern we identified and raised with officers and the contractor were being responded to and addressed during the course of the review. In addition, the review was undertaken alongside other improvements being made to the CSC, for example resulting from the council's *100 days of change* initiative. In consequence, we re-visited the CSC towards the end of the review to establish the extent and impact of the changes and to receive up to date performance statistics.
7. We recognise that much has been done to improve the service, often in line with the concerns that we have raised during the review, and that council officers and the contractor have developed the CSC over the course of its life. We particularly welcome the One Touch project, that went live in November, and the initial work that has been done around actively responding to bereavement and its associated impact on various services.
8. The CSC has bedded down in a number of areas. In our view, services should always be considered on their individual suitability before being included within the CSC, rather than a blanket approach being adopted. Particular functions remain key in terms of service provision and these will require constant monitoring. This report discusses and makes recommendations in respect of:
 - advocates
 - training and levels of knowledge and expertise
 - performance monitoring
 - housing repairs
 - communication and publicity

Background to the review

9. We have maintained an active interest in the CSC throughout the life of the centre, beginning with our call-in of the executive's initial award of contract in 2004. The CSC opened in May 2005 and in October of that year we received our first formal briefing on the CSC's performance and interviewed Councillor Paul Kyriacou, then executive member for communications and performance improvement.
10. At this first briefing we raised issues which informed our subsequent decision to formally review the success of the CSC:
 - The extent to which stakeholders and customers had been involved in the development and monitoring of the service;
 - Questions of performance, including the time taken to answer calls;

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- How far all the council's services had been successfully integrated into the CSC;
 - The process for closing cases and any incidence of cases being closed prior to full resolution;
 - The prospect of other councils buying in to Southwark's call centre;
 - Levels of sickness and successful training and motivation of call centre operatives;
 - The proposed final number of council telephone numbers to be publicised.
11. In March 2006 we received an update on these issues and, in July, scoped our scrutiny review. The aims of the review are set out below. The review was prompted by a range of concerns about the efficiency of the CSC, particularly in the following areas:
- Waiting times before calls were answered;
 - **Inadequate response to calls;**
 - **Poor service to tenants and leaseholders in comparison to service previously provided by area housing offices;**
 - Operators' lack of knowledge about services;
 - Operator's lack of local geographical knowledge; and
 - Poor service in respect of housing repairs.

Aims of the review

13. Our original aims were to review:
- Quality of service;
 - Achievement against the original project plan;
 - Performance against targets (savings, cost of calls, etc.); and
 - Level of public awareness of service (communication and public relations).
14. At the initial stage we asked:
- Is the CSC fit for purpose?
 - Does it serve different communities (and will e.g. tenants' and residents' representatives get a different service)?

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- Are current call waiting times acceptable?
- How quickly are problems resolved (and what is the process for closing jobs)?
- Is staff training appropriate and adequate?
- Does the CSC provide employment for people in the borough?

Method of review

12. We have collected evidence in the following ways:

- Visiting the CSC
- Visiting two other councils' call centres (Lewisham and Westminster)
- A questionnaire sent to tenants' and residents' associations, community and other local groups and publicised in the press (the responses are attached at Appendix B)
- A follow-up questionnaire sent to respondents to the original questionnaire (the responses are attached at Appendix C)
- Formal evidence received at our meetings on November 20 2006, January 22 2007 and April 2 2007

13. At our meetings we considered evidence from:

- Council officers and the contractor
- Active Citizens Hub Volunteer Centre
- Astbury Road Area Residents Association (ARARA)
- Applegarth House Co-operative
- Tooley Street Tenants' & Residents' Association
- Northfield Tenants' & Residents' Association
- Tenants' Council

14. We would like to thank all individuals and groups who gave their time to assist with the review by providing information, attending meetings and submitting comments.

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The committee

15. Between the date of the first session on September 18 2006 until the close of the review in January 2008, membership of the committee was:

Councillor Fiona Colley (Chair)
Councillor Bob Skelly (Vice-Chair until May 10 2007 meeting)
Councillor Jane Salmon (Vice Chair from May 23 2007 meeting)
Councillor James Barber (November 5 2007 meeting)
Councillor Paul Baichoo (until December 11 2006 meeting)
Councillor John Friary
Councillor Barrie Hargrove
Councillor Adedokun Lasaki (from January 8 2007 meeting)
Councillor Tim McNally
Councillor David Noakes (until October 8 2007 meeting)
Councillor Lewis Robinson
Councillor Dominic Thorncroft (until May 10 2007 meeting)
Councillor Veronica Ward (from May 23 2007 meeting)

Reserve Members who attended meetings were Councillors Jonathan Mitchell and Althea Smith.

Co-opted members were Ms Ann Marie Eastwood, Rev Nicholas Elder and Mr Alie Kallon.

Themes from the review

Advocates

16. A continuing theme throughout the review was that of the difficulties encountered by advocates - individuals or groups contacting the CSC on behalf of others. These included councillors, street leaders, tenants' and residents' association representatives and voluntary organisations.
17. Processes tended to be tailored to individuals making contact on their own behalf – reflected in terms of callers being asked for their own names and addresses, which might not relate to the particular issue being raised, rather than details of the address where a problem was located. Some evidence suggested a lack of understanding by CSC operatives about the roles of representatives and local groups and an inflexibility of process which failed to allow problems to be raised effectively by community representatives.
18. In response to part of this problem, the members' enquiries line was established in November 2006. Members of the committee who have used the line have received a prompt service and are of the view that it is a useful mechanism for tracking casework. Use of the enquiry line tends to reflect individual councillors' work patterns for dealing with casework – for instance it is only available during office hours and on weekdays and therefore of limited use to councillors who predominantly undertake ward casework during the evening or at weekends. However, email enquiries are dealt with efficiently

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and speedily. We consider that, in time, the service provided by the CSC to all callers should be of such a standard as to make a separate members' enquiries line unnecessary.

19. Over the life of the CSC, Southwark officers and the contractor have put effort into strengthening links with the community. This has included attending community council meetings and working with tenants' and residents' associations and organisations such as Age Concern. We welcome this attempt to better understand the problems faced by residents and to develop a service that can respond to these problems.
20. In terms of community advocates, we particularly welcome the dedicated enquiry line for estate and street leaders introduced in March 2007. One of the other council call centres we visited provides a similar dedicated line for community groups and advice centres. We would like to highlight the possibility of introducing a fast-track service, or extending one of the lines already in operation, for such groups. This would need to take account of relevant data protection issues to allow advocates to take up cases on behalf of the individuals affected.
21. **We recommend that similar status be given to groups providing advice and assistance services to the community as is given to Members, in terms of a dedicated enquiry line - e.g. Active Citizens Hub, Citizens Advice Bureaus, Southwark Disabilities Association, Southwark Carers and Southwark Pensioners.**

Training and levels of knowledge and expertise

22. Effective training of operatives is essential to the success of a call centre, including general customer care skills, developing knowledge about the local area and the council's responsibilities, and training in diagnostic skills relating to problems being reported.
23. At our meetings various anecdotal evidence was submitted about operatives' lack of geographical knowledge and failures in understanding of the council's responsibilities (for instance our policies and powers around noise nuisance and bonfires). Some problems were reported in contacting the out of hours service where a similar lack of clarity had been encountered. In the area of housing repairs, some witnesses reported that operatives were not clear about what constituted an emergency and the consequent process required.
24. The structuring of teams within the call centre obviously contributes to the knowledge and expertise that is available to the caller when they phone in. One council we visited blends skill sets within each team – Southwark now provides expert support through a team of “floorwalkers”. Both the other councils we visited train staff in policies and practice rather than requiring operatives to follow set scripts.
25. We are confident that training is a high priority for the contractor and have received updates on training and the approach to training throughout the

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review. We understand that each CSC operative now develops a portfolio of 2 knowledge bases. We have been taken through the process whereby managers monitor calls coming in to the CSC and are able to allocate these calls on the basis of the known skills of each operative in order to provide the most efficient service possible.

26. Training clearly impacts on motivation, levels of sickness and staff turnover. We would wish to identify these last two as areas for constant monitoring.
27. We remain keen that, as far as possible, the CSC provides employment for people living in the borough. This may have the additional benefit that staff already have some local knowledge, prior to introductory training. On our (final) visit to the CSC we were happy to learn that employee turnover at the beginning of the year was as low as 12.9% and that 48% of staff working in the CSC lived in the borough.
28. Southwark and the two other councils we visited all take different approaches to training. We are not clear whether different approaches are more effective than others but are of the view that Southwark and Vangent have established a successful training model. The challenge now is to capitalise on the strong foundations that are in place.
29. We consider that one avenue for exploration is to review the council's use of interactive voice response (IVR). The number of levels of menu has been reduced to two but this still the subject of general complaint and always a problem for certain groups of callers. A consistent and experienced workforce could allow the council to move away from dependency on IVR and make full use of skills and knowledge that have been developed by staff.
30. **We recommend that the council adopt a long-term aspiration to minimise and if possible eliminate the use of IVR.**

Performance monitoring

31. The evidence presented by the various groups at our meetings, and fed back to officers and Vangent, focused on the perceived unacceptable length of call waiting time, failure to call back and the lengths of calls themselves (for instance the time taken to allocate reference numbers). Some witnesses also raised the fact that CSC operatives were unable to transfer callers direct to council officers.
32. Since the inception of the CSC, both before and during our review, we have received various performance reports. The latest performance statistics we received were on our visit to the CSC in October. Appendix A sets out the contractor's performance against agreed targets over the course of the review. The table includes the total number of inbound calls offered, the percentage of calls answered within the agreed service level, the abandonment rate (against service level target of 5%) and the average call waiting time. The initial target for answering calls was that 80% be answered within 30 seconds. On 1 October 2006 this changed to a target of 80% being answered within 45 seconds.

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33. While we recognise that improvements have been made, the statistics only show average waiting times. During the review we asked officers for details of shortest and longest waiting times and **understand that the compilation of such data has been commissioned.**
34. We remain interested in any difference in performance across individual service areas and specific geographical areas, such as community council areas. We understand that discussions are taking place on the possibility and financial implications of producing performance matrices for each individual service area. We would like to see a basket of indicators being put together to provide a greater spread of information.
35. We would like to emphasise the importance of continuing and consistent monitoring of performance indicators. We understand that performance data for the CSC forms part of the council's quarterly monitor and focuses on the key targets in place, i.e. 80% calls to be answered within 45 seconds and a 5% call abandoned rate. These formal performance indicators must continue to be a matter of clear public record. In addition, we would wish officers to continue to hold monthly briefings with the relevant executive member to consider the full range of service delivery issues and performance data, particularly in the area of housing repairs.
36. **We recommend that the executive ask officers to pull together a basket of indicators against which performance can be regularly monitored, to include calls per hour and the distribution of waiting times for each service area.**
37. **We recommend that, in the long-term, the council aspire to a return to the initial target for answering calls of 80% within 30 seconds.**

Housing repairs

38. Much of the evidence submitted, both at meetings and in response to the questionnaire, centred on callers' experience of the housing repairs service. Issues raised by users can be summarised as:
 - Unclear criteria for establishing emergencies
 - Failure of CSC to diagnose the problem as reported (resulting in repairs contractor attending appointment but being unable to complete repair)
 - Failure to resolve reported problem after a first call
 - Contractors missing appointments
 - CSC not being aware that appointments had been missed
 - Jobs being closed on the system when they had not been resolved (and consequently new reference numbers being raised for a job that had already been reported – impacting on performance statistics)
 - Lack of invited feedback from customer raising complaint (in terms of service provided by CSC and service provided by contractor)

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39. These issues were passed on to council officers responsible for managing the CSC contract and, at our meeting in April, they reported the establishment of a repairs control centre within the CSC. This would facilitate the tracking of repairs from report to outcome and establish a new process for repairs appointments and monitoring of appointments where contractors cannot gain entry. In October we visited the new Housing Repairs Control Centre to view the updated systems and receive statistics on housing repairs outcomes. We were impressed by the work of the new control centre but took note that heating contractors and lift contractors are not included within its remit. Currently it is not possible for the CSC to adequately monitor work being done on heating and lifts. Addressing this must be a priority.
40. In April Officers also reported that clearer criteria had been introduced for establishing emergency cases. The system had been cleaned of jobs raised in error and the volume of jobs remaining on the system was being closely monitored.
41. We understand that the CSC, housing and contractor staff have been working together to identify gaps in work processes and to develop better training for all involved.
42. Over the life of the review, a project team was set up, the Repairs Control Centre (RCC) Development Team, to scope out and deliver on a number of targeted operational and customer focussed improvements with regard to the RCC. This multi-agency group, lead by Housing, has set-up terms of reference and drafted an outline of key issues and a project board has been put in place to oversee the work of the group. When we last visited the CSC we were impressed by the work of the new team but remained concerned that communication remains a problem in respect of addressing housing repairs – there can be a delay from the time of the initial call reporting a problem to the time of the repair itself.
43. While we acknowledge that recent initiatives have addressed many of the concerns raised by witnesses during our review in terms of housing repairs, we remain concerned that there is still much to do. One example is that methods used to gather customer feedback are not sufficiently robust. New systems need to be introduced, in addition to sampling already underway to check whether problems have been correctly diagnosed by operatives and allocated correct codes and priority.
44. Consultation undertaken by the two councils we visited includes a minimum number of calls and surveys being undertaken each month to original callers in order to determine quality of service. At Lewisham the survey in respect of housing repairs includes a specific question about the number of calls that had to be made before the repair was satisfactorily resolved.
45. On our visit to the Housing Repairs Control Centre in October we noted statistics stating that 95% of appointments were kept and 85% of repairs completed on the first visit. Some of our members questioned these figures, particularly in view of continuing problems reported to them by constituents

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and also in view of cases taken up at arbitration. Officers reported that the statistics were based on follow-up surveys undertaken by the Control Centre. We were keen to find out whether these figures could be broken down to give information on a ward by ward basis. We were also keen that the number of call-back surveys be increased to 100% of repairs reported and completed. We understand that officers and the contractor are in discussion over this and, if this figure is achieved, we would like to receive a briefing in 6 months giving up to date statistics, both for the whole borough and for each housing area.

46. **We recommend that the executive ask officers to explore the possibility of including repairs to heating and lifts within the remit of the repairs control centre.**

Communication and publicity

47. We understand that the aim is to continue to reduce the range of telephone numbers publicised as contact points for the council. We are pleased that a move away from the elaborate integrated voice response (IVR) menu system has been achieved to produce two levels of menu but, as stated above, would like the council to aspire to minimising the use of IVR.
48. We are concerned that the volume of received calls remains skewed towards week days and working hours. We are of the view that, in consequence, action must be taken to encourage people to call the CSC at weekends, rather than wait until Monday morning (the current peak time for callers). One specific action would be to change the recorded message received by callers when they phone the council's out of hours number at weekends. We believe that the current message is not clear that calls can be made at any time and effectively discourages any calls except those considered to be emergencies.
49. Some witnesses highlighted that the recorded messages put in front of the menu of options were not always relevant to the caller – for instance letting callers know of particular problems on individual estates that were already being looked into. We wondered whether it would be possible to allow callers to skip this message if it was not relevant to their call.
50. In general terms, we are not clear how effectively the CSC has been publicised within Southwark (including its 24 hour availability). In addition, we are not clear where there is any strategy to encourage use of the council's web-site as an alternative means of contact and access to information and other services.
51. **We recommend that the CSC and the out of hours service be re-publicised in all council publications, drawing attention to the best times to call.**
52. **We recommend that officers look into the possibility of callers being able to skip recorded messages that are not relevant to their call – in order to save the caller waiting time and cost of a longer call.**

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Summary of recommendations

1. We recommend that similar status be given to groups providing advice and assistance services to the community as is given to Members, in terms of a dedicated enquiry line - e.g. Active Citizens Hub, Citizens Advice Bureaus, Southwark Disabilities Association, Southwark Carers and Southwark Pensioners.
2. We recommend that the council adopt a long-term aspiration to minimise and if possible eliminate the use of IVR.
3. We recommend that the executive ask officers to pull together a basket of indicators against which performance can be regularly monitored, to include calls per hour and the distribution of waiting times for each service area.
4. We recommend that, in the long-term, the council aspire to a return to the initial target for answering calls of 80% within 30 seconds.
5. We recommend that the executive ask officers to explore the possibility of including repairs to heating and lifts within the remit of the repairs control centre.
6. We recommend that the CSC and the out of hours service be re-publicised in all council publications, drawing attention to the best times to call.
7. We recommend that officers look into the possibility of callers being able to skip recorded messages that are not relevant to their call – in order to save the caller waiting time and cost of a longer call.

Meeting agendas, reports and minutes

The agendas, reports and minutes of all meetings of the committee are available from the scrutiny project manager, scrutiny team, Town Hall, Peckham Road, London SE5 8UB [Telephone 020 7525 4350].