SOUTH CAMBRIDGESHIRE DISTRICT COUNCIL

REPORT TO:	Scrutiny and Overview Committee	3 November 2011
AUTHOR:	Cllr Lynda Harford, Chairman of the Task & Finish Group	
Portfolio Holder:	Cllr Tom Bygott, Policy and Performance	

SCRUTINY REVIEW - LEARNING FROM CUSTOMER FEEDBACK

Purpose

1. To report on the work of the task & finish group looking at how well the Council learns from the information gained via customer feedback and uses it to inform service planning.

Options

2. The Committee could endorse, amend or reject each of the recommendations in this report before agreeing to forward it to the Policy and Performance Portfolio Holder.

Background

3. The Scrutiny and Overview Committee has provided regular input regarding the Council's policy and processes for dealing with customers' comments, compliments and complaints (CCC). This has helped to raise awareness of the need for an efficient process that provides timely responses to customers and helps the council to learn from feedback.

4. The Committee was pleased to note that officers were now completing a Learning from Complaints form for each complaint, although it was unclear whether learning was in fact taking place in every case or whether the learning was being shared across the Council.

5. Another question was whether learning was being captured from other, non-complaint, feedback. Lastly, the Committee wanted to explore the extent to which customer feedback was being used to inform service planning and improvement.

6. The Committee therefore agreed to hold a one-day event run by a small cross-party task and finish group in October 2011 to look at these issues.

7. A scoping document was agreed as at Appendix A, with the following terms of reference: *To examine and recommend improvements regarding the way that the Council learns from information gained via customer feedback and uses it to inform strategic service planning.*

8. The following Members made up the task and finish group: Cllrs Val Barrett, Lynda Harford, Tumi Hawkins, Bridget Smith, Ted Ridgeway Watt and Bunty Waters. The Portfolio Holder, Cllr Tom Bygott was also involved at all stages.

Report of the task and finish group

9. In preparation for this review, the task and finish group read a publication by the Centre for Public Scrutiny and Local Government Ombudsman, *Aiming for the Best*. This identified some common enablers and barriers to using the insight from complaints effectively:

   Enablers
   - providing people with lots of ways to give feedback
   - creating a culture of learning and improvement
   - leadership in sharing lessons across the organisation
   - a co-ordinated resource that maximises the impact of learning

   Barriers
   - treating complaints as an opportunity to simply defend practice
   - poor communication with citizens and complainants
   - silo approach to complaints, no sharing of lessons across the organisation
   - little connection between feedback and strategic planning

10. The task and finish group decided to explore these ideas in a workshop with senior managers and portfolio holders. On the advice of the Scrutiny and Overview Committee the scope was widened to look at the use being made of all types of customer feedback, not just complaints. They felt it was important to capture all potential learning, no matter how customers chose to express their views.

11. A week before the one-day event, the task and finish group held a preparation session with the Customer Experience Coordinator and Customer and Business Services Manager. A sample of the forms introduced for promoting learning from complaints, revealed that some were being completed to a rather perfunctory standard. This raised questions about whether some service areas were just going through the motions; and whether there was over-reliance on the corporate team to police the process and monitor the information.

12. The task and finish group wanted to explore whether there was ownership of the process amongst managers and the extent to which the feedback was informing learning and service improvement.

Getting the language right

13. From the outset the group decided that the expression 'customer feedback' was more neutral and constructive than compliments, comments and complaints - and that customers might find this more comfortable. The Council's website had a front-page link to "Making a Complaint" which conveyed a pessimistic expectation; the label might deter some customers from speaking up, and it did not allow for other types of feedback.

14. However, it was agreed that there will always be complaints and the word did need to be used when appropriate.

   Recommendation 1: Wherever possible the Council should invite, address and learn from "customer feedback", rather than "compliments, comments and complaints".

Creating a culture of learning and improvement

15. The task and finish group agreed that what they needed to look at was not processes and procedures but the council's culture. Was feedback being encouraged and sought out. Was it seen as an opportunity to learn and improve services. Were staff supported if they tried to find an imaginative solution, even if it did not turn out as intended. Did staff feel able to bend the rules to achieve a better, speedier or more cost effective outcome.

16. To set the scene, the chief executive was asked about the culture that she would like to promote at SCDC. She described the need to actively seek out feedback, to make it easy for customers to give feedback in whatever way they chose, and to deal with that feedback promptly and positively. She cited major retail chains who had actively developed a reputation for dealing positively with feedback. Customers were not sent to the 'right department' to give their feedback. Simple methods were used for communicating "you said, we did" messages. And staff did not simply resolve a problem, they took a more holistic view of the customer, anticipating other likely needs beyond the one presented.

17. The chief executive had introduced a leadership programme for managers which would equip them to develop a no-blame culture where staff would feel empowered, trusted and supported – and where feedback was seen as an opportunity to learn and improve services.

18. The task and finish group found that managers shared her vision and to varying degrees they were beginning to succeed. However this did represent a cultural shift and would take time to embed. The chief executive was using every opportunity to communicate to staff, members and partners the value placed on learning and improving; and managers were reinforcing the message through team meetings, appraisals and less formal mechanisms.

19. There was an example of teams being reorganised so that staff could learn from each other about the need to respond positively to feedback and learn from it.

20. Another manager spoke of the importance of involving relevant front line staff in responding to feedback, giving them an opportunity to learn directly. He and other managers encouraged the "early surfacing" of potential complaints, which fostered a culture of openness and willingness to learn.

21. There was also an example of working around the rules to achieve a speedier and more cost effective solution. Instead of a protracted approach via insurers and lawyers, a resident had been swiftly compensated for damage to his car where both he and the council had contributed to a minor collision.

22. The task and finish group was also keen to understand the role for elected members in supporting a culture of learning and improvement. It was felt that the scrutiny committee provided a forum for constructively using customers' experiences to inform service design and improvement. Portfolio holders received quarterly reports which enabled them to spot themes or trends and gauge the success of service changes for example.

23. It was perhaps at an individual level that members did not always realise the importance of passing on positive feedback and the effect it could have on morale and performance. Similarly some were unsure how to pass on negative feedback,

especially to hard working teams. It was agreed that this could be addressed through induction and ongoing training.

Recommendation 2: Member training and induction should include guidance about the timely sharing of customer feedback with the relevant corporate manager or customer service coordinator.

24. Similarly, there was a need to remind staff about members' role in supporting a learning culture; they needed to make use of the local customer insight held by members. For example if a customer provided feedback regarding a particular issue or service, the ward member may be aware of a wider range of local views or experiences which they could use.

Recommendation 3: Officers should be made aware of the value of asking members about customers' views and experiences regarding the services they provide.

Providing lots of ways to give feedback

25. The task and finish group agreed that it was important to provide a variety of ways for customers, partners and staff to give feedback easily and managers described some excellent practice. There were satisfaction questionnaires and user groups in most service areas and a new online forum for housing tenants. The website for choice based lettings had a "thanks and rants" button. Officers attended parish council meetings, community coffee mornings and neighbourhood panels.

26. The council had commissioned an audit of local social media in order to tap into local discussions about the area in general, and the council in particular.

27. There were also several ideas for becoming more proactive in future. For example the contact centre could ask callers if they would like to give any (other) feedback; reception staff and outreach officers could do the same. Internal customers and staff could be asked for feedback in a variety of ways beyond the existing form filling; and there was still a need in some service areas to recognise internal customers as customers. It was felt that the Executive Management Team (EMT) would be the right vehicle for progressing these ideas.

Recommendation 4: EMT should build on current good practice to develop a range of new methods across the council for collecting feedback from internal and external customers and partners using a 'whole customer' approach.

28. Just as important was the need to build a reputation for acting on feedback so that people felt that speaking up would be worthwhile. The group found some good practice. For example the second annual report to housing tenants was redesigned in direct response to tenants' feedback about the first annual report. In another service area, an officer had questioned part of an admin process which had led to an immediate change.

29. However, even in service areas where feedback was gathered in excellent and imaginative ways, communication about the results did not appear to happen systematically. For example, satisfaction surveys could routinely ask for "contact details if you would like a reply". A poster in reception could list the current top ten items of what "you said, and we did".

Recommendation 5: EMT should develop a range of ways to systematically communicate the outcomes resulting from feedback - "you said, we did" – to customers, staff and partners individually and collectively. This should include a role for Members.

Sharing and maximising the learning

30. The task and finish group wanted to know what mechanisms were in place for sharing the learning from feedback. Was it openly and constructively shared within teams and across the council.

31. They heard of ad hoc examples such as a presentation at a corporate brief meeting regarding a tendering exercise. One corporate manager had visited his colleagues' management team meetings. Stories were entering the council's folklore, for example regarding a brave and imaginative way of resolving a potential insurance claim; or a policy change resulting from the experience of prospective adoptive parents.

32. However there did not seem to be a systematic way of sharing learning, especially since the disbanding of the Performance Improvement Group. Many of the functions of that Group had been transferred to EMT, and the task and finish group felt that EMT provided a ready-made forum for sharing learning across service areas. This did happen to some extent but the role of EMT was still evolving.

33. There also needed to be a smooth cascade of information and learning from EMT out to other managers and staff.

    Recommendation 6: EMT should ensure that their meeting agendas regularly include "Learning from Feedback" and that the lessons are cascaded back to service teams.

34. Managers would then need to improve the ways in which feedback and learning is used by their teams. There was also scope for sharing amongst teams. For example the benefits team had learned how to deal with upset or disadvantaged people; these skills could be shared with other customer-facing colleagues.

    Recommendation 7: Managers need to build on current good practice to ensure a regular team-based approach across the council to learning from customer feedback and using it to design and improve services.

Learning, learning, learning

35. This short review necessarily focussed on one source of learning, the learning available from customer feedback. However, the mechanisms recommended for harnessing that learning could also be used for learning from experience, learning from surveys, peer reviews, formal training, best practice and other sources.

36. The scrutiny committee may wish to return to this issue at a later stage, to monitor the council's progress in establishing a learning culture.

Implications

37.

Financial	Actions recommended in this report are expected to be achieved within existing resources. They may lead to savings as yet unquantified.
Legal	None
Staffing/capacity	Recommendations in this report are expected to be achieved within existing resources.
Risk Management	If recommendations in this report are not implemented, there is a risk that opportunities for service improvements may be missed.
Equality Impact Assessment completed	A partial EqIA was completed in 2009 and it found that all impacts were identified as neutral. This review addressed additional aspects of equalities such as how to encourage feedback from customers who do not write but a new EqIA will be needed when the overarching customer service strategy is completed in 2012.
Involving young people	The task and finish group would recommend that EMT consults young people when progressing Recommendations 4 and 5.
Climate Change	None

Consultation

38.   The portfolio holder for policy and performance was involved at all stages of this review.

Effect on Annual Priorities and Corporate Objectives

39.   Improvements to the Council's efficient use of information gained via customer feedback will help to meet the Council's commitment to being a listening council, providing first class services accessible to all.

Options

40.   The Committee has the options to endorse, amend or reject each of the recommendations before agreeing to forward them to the Portfolio Holder.

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