



Scrutiny Group Review

Communication

March 2023

Introduction & Scope

The review of “Communication” was identified and selected for a resident led scrutiny review due to the strategic ambitions to improve satisfaction with “PFH keeping residents informed & listens to views and acts upon them”, and ahead of the implementation of the new housing management system to allow residents to shape and influence how PFH use the system to meet resident’s needs.

The review was undertaken using a task and finish approach over 12 weeks. Residents were recruited by written invitation to all residents who had either previously engaged with scrutiny at PFH or had expressed recent interest. 13 residents were contacted, 7 expressed interest and subsequently joined the review.

Scrutiny Review Team; David W, Dave B, Elaine E, Ann E, John H, Dr A, Val C

Staff Involved; Kate-Marie Foster, Customer Experience Manager supported the review as the Scrutiny Coordinator & Review Lead. Various other members of staff supported the review including Terri Goult - Customer Services Manager, Joe Day – Head of Home Services, Lisa Lewis - HR Manager and the Customer Services Team.

The scope of the review was agreed as follows;

- Identify ways in which PFH can improve its communication with residents

What We Did

During the scoping and planning meeting the group agreed a number of activities and literature that was required to undertake the review. This evolved at each meeting as the review progressed and the following activities were undertaken by the group;

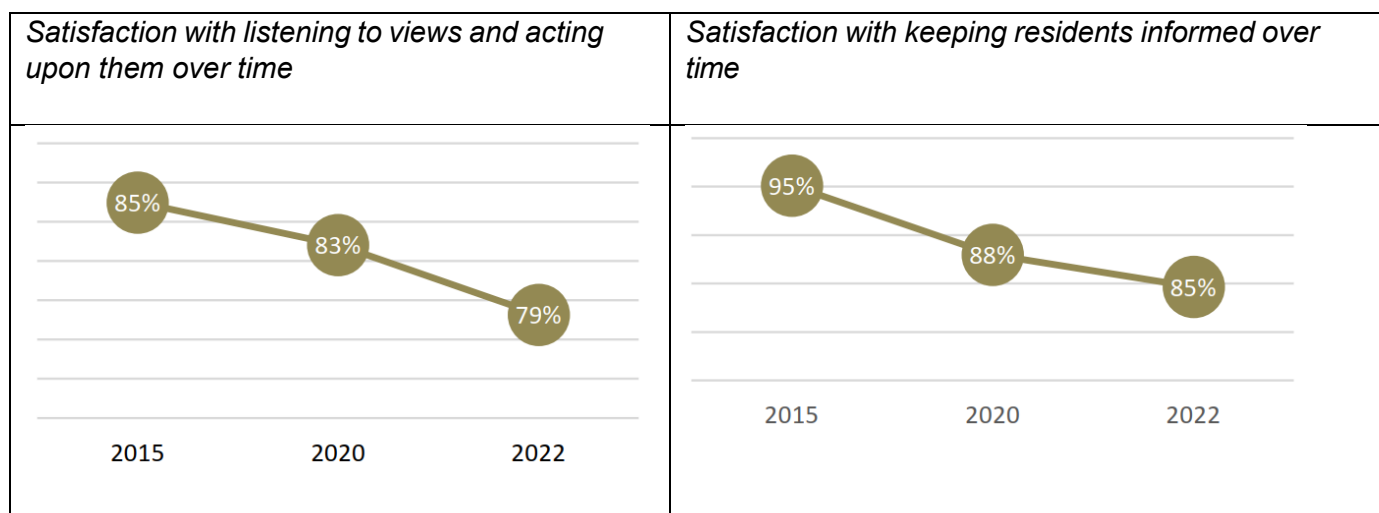
What was reviewed	How & When
PFH Communication Strategy - May 2021	Circulated in post 19/01/2023
Code of Respect	
Complaints Themes - Complaints relating to communication / contractors & staff from last 24 months	
Repairs Satisfaction from Resident Satisfaction Survey 2022	
Written Communication Principles	Group provided with a variety of options for font size and fonts and discussions took place about style and language of written communication on 31/01/2023
Verbal Communication Principles	Group provided with some discussion points around expectations on verbal communication on 31/01/2023
Shadowing Customer Services Team – listening to calls, understanding quality checking, speaking with CS teams	Two scrutiny group members attended 10/02/2023
Quality Framework of call handling - Discussion to take place with Customer Services Manager as part of shadowing exercise	As above - 10/02/2023
Customer Satisfaction - Exert from Resident Satisfaction Survey 2022 on Communications	Circulated copy on 16/02/2023
PFH Service Standards – Revised to come in force from April 2023	Circulated 21/02/2023
Resident Handbook (2022)	
Case Study from Customer Services Manager	
Staff Induction Presentation & Information	Presentation shared by HR Manager 28/02/2023
Staff Code of Conduct - 2011	Shared at meeting 28/02/2023
Q&A Session with Joe Day, Head of Home Services	Undertaken on 28/02/2023

Project Timetable

	Date
Scope & Planning Meeting	10 th January 2023
Scrutiny Group Meeting (residents only)	17 th January 2023
Update and Progress Meeting	31 st January 2023
Scrutiny Group Meeting (residents only)	14 th February 2023
Update and Progress Meeting	28 th February 2023
Update and Progress Meeting	14 th March 2023
Review and Agree Findings	21 st March 2023
Draft report circulated for final comments	24 th March 2023
Final Report Completed	6 th April 2023
Report to Resident Committee	2 nd May 2023
Report to Board of Trustees	23 rd May 2023
6 Month Follow Up	November 2023

Findings

PFH had undertaken a resident wide survey in autumn 2022 with 862 residents responding which positively showed an increase in overall satisfaction at 95% (previously 91% in autumn 2020), however resident satisfaction with communication had decreased, notably “Satisfaction with listening to views and acting upon them” and “Satisfaction with keeping residents informed”.



As the topic of “communication” by nature is very broad, the group primarily focussed on their experiences of communication with and from PFH to see where improvements could be made from their lived experiences.

Creating a Positive Resident Focussed Culture

The group felt that in some of the experiences shared there was often a lack of understanding when considering the needs of the residents when communicating with them, examples included not being listened to, having their views dismissed, lack of empathy and not hearing back which all had made them feel undervalued. The group appreciated that though PFH is an “older persons” housing provider, and that the needs and wants of a 60 year old may be different to a 100 year old, however that it was PFH’s responsibility to understand who the residents are, what challenges and barriers they may face and how PFH can make this easier (Recommendation 3).

The group felt though the induction process covered the mission, values and ambitions it was lacking insight on who the residents are. The group understood naturally some staff would spend more time getting to know residents due their customer facing roles, but it would be beneficial to have an organisational wide approach to getting to know the residents and creating more opportunities for staff to spend time with them (Recommendation 2). It was also noted the Staff Code of Conduct hadn’t been reviewed since 2011 and should be looked at in conjunction with the Code of Respect for consistency, all of which should be co-created with residents (Recommendation 1).

Written and Verbal Principles

The group reviewed several items of correspondence and options, carefully considering what principles would improve written communication. The group unanimously agreed on the principles set out in the recommendations (Recommendation 4), and though they didn’t feel this was major issue, it was agreed that having a consistent approach was beneficial to all.

The group were pleased to hear that PFH provides a translation service for residents for whom English isn’t their first language.

The group discussed verbal principles (Recommendation 5), some of these were covered in the new Service Standards which come in force from April 2023, but the group felt that more should be considered. It was also recognised there may be crossover with the Staff Code of Conduct. Residents felt improving verbal communication was a priority for PFH and where big improvements could be made. The group felt demonstrating PFH is listening when interacting with residents was key, the group specifically called out the disappointment and frustration when staff

don't take notes (either handwritten or electronically), be this in meetings or a one on one query, though they recognise some staff will remember and take action, it comes across as though their query isn't important, and examples where shared when queries had then been forgotten.

Further to this, some group members had experienced asking members of staff for information and simply being told, "I don't know", "no one had told me", "I've asked another member of staff but they haven't come back to me" or simply not hearing anything back at all. The group felt these types of responses are unprofessional and unhelpful and more thought should be put into how to handle queries, favouring "I don't know, but I'll find out for you", "I'll chase that again for you". It was observed by the group that resident facing staff often rely on information from other staff members to answer queries, and when that isn't shared and colleagues aren't supporting one another by timely responses internally it lets everyone down (Recommendation 1).

Civica

The group were aware that a key driver for the review is that PFH are implementing a new housing management system which is expected to go live around September 2023. The group were asked to consider how PFH could adapt/build processes to improve communication with residents during the review. Their understanding in this area came from the shadowing of the Customer Services Team, discussions with the Customer Services Manager and Head of Services, along with guidance and updates from the Customer Experience Manager.

The group were very much in favour of PFH utilising the automation that will come from the system, particularly with regards to communication on repairs via text messaging (Recommendation 6). Although it was appreciated not every resident would want this/be able to receive it, it was felt that a large proportion of residents would benefit, and that it was likely that group would grow with the changing demographic of the resident group.

During the shadowing activity, the residents who participated noted how complex the current system was for raising the works order, and the work that Customer Services Team had to undertake as part of this process. The group were pleased to hear that the team are anticipating the new system to be simpler to use, and the use of visual diagnostics would support them greatly when categorising a repair quicker which would give a better service to residents. The group praised the Customer Services Team for the work they do in terms of the broad spectrum of knowledge

they need to have and their approach when handling the calls. They felt the team would benefit from receiving an acknowledgement from contractors when raising orders, this would give confidence that this had been received, ideally the system should also send that acknowledgment to residents in text message too (Recommendation 6 & 7).

The group felt the lack of insight into observing trends/repeat issues was detrimental to residents and meant PFH couldn't be proactive in their approach. An example of this was residents in the same area reporting leaks a period of time after bathroom installs, and that the system didn't flag the trend. The group felt this should be part of the reporting system within Civica so PFH could get ahead of any issues before they became bigger which would give a better service to residents (Recommendation 8).

Due to an experience of a member of the group during the review, it was highlighted to the group that PFH are looking to create a complex case management system in Civica to help support individual residents when faced with a situation outside PFH's normal day to day service delivery, the group felt this would be positive (Recommendation 14).

The group felt the implementation of Civica should be used as an opportunity to redesign the rent statement with residents. Group members were frustrated with the current rent statement which has been echoed at other meetings. Residents feel this is hard to understand and could be improved upon. Further to this, communication around the rent increase letter and service charges should be considered as part of this recommendation (Recommendation 9).

General

The group discussed the Resident Handbook, sharing they each had different versions of this depending on when they moved in as they are handed out at sign-up stage. The group were informed that when PFH redesigned the Handbook some years ago, a decision was made at Resident Committee not to re-issue the handbook to all residents due to the cost implication, though an article was placed in People First informing residents they were available upon request, and the most up to date version is on the website. The group felt PFH should have a better plan in place to ensure all residents had access to an updated version, particularly as things change and some residents had been with PFH a long time, it meant loyal longstanding residents wouldn't have access to up to date information (Recommendation 11).

The group also felt the Resident Handbook needed a full review with residents supporting this to ensure this meets residents needs and reflected what is most important to residents. It was noted that a lot of corporate information was prioritised early on in the handbook, making contact & repairs information more difficult to find, though this is more likely to be more important to residents. It was also noted the handbook was very heavy, which may make it difficult for some residents to use (Recommendation 10).

The group made comments about not always understanding what is expected from each service such as Ok Each Day (full or lite service), out of hours repairs, emergency response, telecare equipment etc. It was felt this should be clearer in the handbook, but also that further campaign work is undertaken to ensure residents understand what they get from each service on a periodic basis(Recommendation 12).

When the group shadowed the Customer Services Team, the Customer Services Manager also undertook the quality scoring on calls to demonstrate how this is done. The group suggest as part of this process when quality has fallen below expectation that the manager contact the resident to follow this up (Recommendation 13).

Neighbourhood Walkabouts

The group discussed their experiences of neighbourhood walkabouts, and how this could be a strong communication tool and demonstrate to residents PFH listening and taking action. The group felt more staff presence and reaching out to residents who may not be able to walk around the whole scheme would help. The group felt this would make residents feel like they were important to PFH (Recommendation 15 & 16).

Quarterly Resident Meetings

Two members of the group were residents of Retirement Living Plus schemes and observed inconsistencies with the way the Quarterly Resident Meetings are undertaken. Though comments on the whole were positive, it was felt there was some improvements should be made (Recommendation 17).

Contractors

The group discussed the contractors PFH use, understanding how performance is managed and their experiences, particularly at the FAQ session with the Head of Home Services. The group didn't identify any specific recommendations relating to this, but supported recent internal changes to satisfaction surveys which are looking in more detail at resident perception of individual contractor performance. Also the group supported PFH's decision from April 2023 to move to use the resident perception survey of "% of residents satisfied with the repair being done 'right first visit'" (as of March 88%) over the contractors account of if a job had been completed at first visit (as of March 98.2%) due to a disparity between the two results currently.

Recommendations;

1. PFH should update the Staff Code of Conduct in line with the Code of Respect ensuring the two align and demonstrate a clear message to all. This should be co-created with residents. The Staff Code of Conduct should include the importance of supporting colleagues with queries, in particular front line staff.
2. Time should be allocated for new starters to meet residents informally at coffee mornings or other engagement events so staff can understand the residents better. Ideally all staff should be able to spend time with residents on a periodic basis to create good relations and understanding between both parties.
3. PFH should create a set of resident personas and journeys that provide insight to all staff on who the residents are. This should be used to support new starters inductions and reminders to the wider staff base as a tool to help decision making and foster good relations.
4. Adopt Written Communication Principles;
 - Use font size 14 for general communication – this is a good size and easy to read
 - Use the font ariel – this is clear and easy to read
 - PFH should make sure all communication options are available (other languages, braille)
 - PFH should sign post to the website and utilise email addresses to cut down on costs and adhere to communication preferences
 - Use plain English, including short sentences and paragraphs were possible to make it easy to understand. If the message is complicated, a bullet point summary should be included. Keep it simple.

- Avoid technical terms, if unsure about if the letter may be difficult to understand, consider running this by residents first, or delivering in a different way such as workshops or meetings.
- Try avoid over-use of acronyms, but if needed, this should be written in full in the first use in a letter with the subsequent acronym in brackets, this can then be used in the rest of the document.
- “Resident” was preferred over “customer”. It was felt customer was impersonal and lacked a relationship between residents and PFH.
- Where appropriate letters should use “we” and “you”, for example, “We would like to invite you” not “PFH would like to invite residents”. It was felt this is more personal.

5. Adopt Verbal Communication Principles

- Staff should tell residents their name
- Staff should let you speak and explain fully without interruption
- Staff should adhere to the Code of Respect
- When raising a repair or general enquiry, staff should explain the next steps including timescales & reassure residents to come go back to PFH if there are any further problems
- Listening is key – staff should check their understanding is right before ending the conversation
- Staff should take notes when taking a query in person – this demonstrates residents are being listened to and the query will be handled
- If a query can’t be answered, staff should commit to finding out and getting back to residents

6. Use automation via text messaging to communicate repairs information, such as confirming the order had been raised including the next step timescales, confirmation of the appointment and satisfaction at the end of the repair. (Civica)

7. Build into the process an acknowledgement for Customer Services when works orders are sent to contractors. (Civica)

8. Use system to look for trends such as leaks etc so PFH can proactively look for any issues to minimise impact for residents. (Civica)

9. Co-design the new rent statement layouts with residents, this could include the rent increase letter and communication around service charges. (Civica)

10. Full review of the resident handbook to be undertaken, co-created with residents to ensure the layout and content meets the resident's needs.

11. Distribution of the newly updated handbook to take place with a clear plan of how future updates will be managed.

12. Create communication plan to give clarity on key services including the Repairs Service, Recharge Policy, OK Each Day, Tunstall lifeline equipment, Astraline – Out of Hours Repairs, Astraline – Emergency Response including what is expected of these services. This may include updates to handbook, individual campaigns etc.

13. When undertaking a quality check on call handling, it should be built into the process that a return call is made to anyone where the standard was below for further discussion to take place.

14. PFH should have a “complex case management” process to deal with situations or repairs that fall outside the routine day to day works. This should clearly set out a communication plan agreed with the resident on an individual basis.

15. Neighbourhood Walkabouts should be used as an opportunity for office based staff to visit where the residents live to broaden their understanding of the areas and build connections with residents.

16. Invites to the Neighbourhood Walkabouts should include an option a resident to request a ‘knock at the door’. This would mean residents who are unable to physically attend the walkabout have their voices heard.

17. Quarterly Resident Meetings; More formality should used with these meetings, as follows;

- Dates for meetings are arranged in advance, for example 12 months ahead with reminders nearer the time
- Residents to have an opportunity to influence the agenda in advance of the meeting, and to receive the agenda in a timely manner so residents can prepare.
- Note taking is to be undertaken in the meeting
- Consider ‘speakers’ to attract more attendance.
- Consider how PFH can involve residents who don't attend – see if there's anything that would support their participation on a one on one basis.
- Minutes to be circulated to all - adhering to the written communication principles and individual communication preferences.

Conclusion

The group have used their experiences along with information provided by PFH to best tackle a review with a very broad scope. Given the possibilities the review could have covered they feel they have identified areas that will positively contribute to improved satisfaction in communication.

Throughout the review the group also shared positive experiences of communication, and recognised the efforts of individuals and were mindful that the recommendations were not an indication of bad communication throughout PFH, but often a lack of consistency experienced from one member of staff to another, and that was what needed to be tackled. Residents felt strongly that by PFH creating a culture of knowing who the residents are and putting that at the heart of all interactions consistently this would have a positive impact to all residents.

The group would like to thank everyone who has been involved in the review and supported them with their time and efforts.