



**brighter futures**  
creative sport, housing and employment

developing customer involvement

the first six months

April 2011

 passionate

 creative

 equal

 empowering

 sustainable

## Background

Brighter Futures has always consulted with and involved customers in developing services that reflect what they want and need.

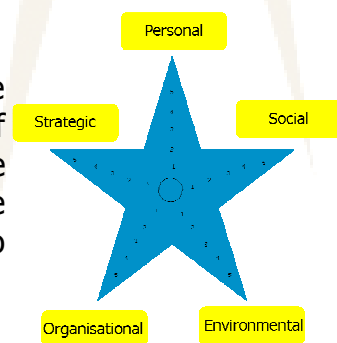
Over the years excellent consultation has taken place within lots of our services and changes have been made in response to the feedback customers have given.

We realised that although regular consultation took place, we had no process to capture evidence of this centrally. We also recognised that not all customers were being given the opportunity to be involved and those that were had very limited choices as to how they were consulted. Feedback to customers was also patchy with some customers reporting that they didn't know what had been done as a result of their involvement.

In June 2010 Brighter Futures appointed a Customer Involvement Officer whose role is to support the Customer Involvement Manager in developing and streamlining consultation throughout the organisation and to create a central point where evidence would be held.

## The star

Brighter Futures has been working with Outcome Stars for the last three years. They have proven to be popular with both staff and customers because of their clarity and ease of use. We developed the Customer Involvement Star to help teams to see what they had already achieved through involvement and to help schemes plan the next stages of development.



## The groundwork

We wanted to ensure that *all* customers were asked if and how they wanted to be involved. To hold this information we developed an Excel database which contains customers contact details, the schemes they use and which opportunities they have chosen. We use the database to send out invitations to events and meetings and to hold information about what the customers have been involved in. The database also helps us to monitor how each scheme is progressing and where improvements need to be made.

In the past we had limited opportunities available to customers which included completing questionnaires and being part of a focus group. We wanted to expand these opportunities to ensure that firstly, customers had the opportunity to be involved in all areas of the organisation and secondly, that we offered more inclusive ways to give feedback. We looked into what other housing associations offered their customers and which options had the best results. This helped us to develop our list into **13** different ways for customers to be involved. These include a variety of new ways to give feedback and help shape the organisation such as recruitment, mystery shopping, email groups and promotion groups. Customers who want to be involved but don't feel able to attend a meeting will be supported to give their feedback in a way that suits them. Next we designed a proof of the document that customers would complete to tell us if and how they wanted to get involved.

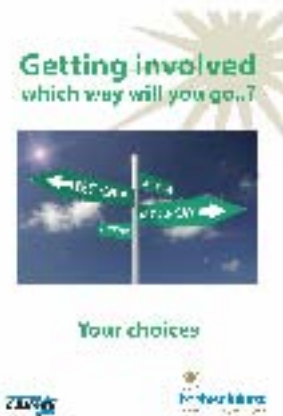
## First steps

Customers were involved in the design of the opportunities document. We invited interested customers to a meeting where they could give their feedback about the look and content of the document. We also asked them when and how customers should be asked.

At the meeting **26** customers from across the organisation gave their feedback and ideas on our proposal. From what customers told us we made huge changes to the look and content of the document and it also resulted in us having two documents instead of one.



We concluded that customers should be asked about involvement within the first four weeks of becoming a customer. Customers also told us that during those first four weeks some people would not be settled enough to be able to get involved and therefore if customers said 'no' to involvement initially, they should be asked again in three months time when their situation would hopefully have improved.



## Involving staff

One of the most important elements of ensuring the new process worked was to have operational managers and their teams fully briefed about why and how we were developing customer involvement. In the past most involvement in schemes has been in addition to the work teams do with their customers. We wanted to change that perception so that involvement became an integral part of the support customers receive and to show teams the positive effect involvement could have on their customers.

In addition we understood that initially the processes would be seen as another task for the teams to carry out and although not complicated, the process did have a number of stages that needed to be completed to ensure the system worked.

We started by developing the concept of having **customer involvement champions** in each scheme. These are support team members who have expressed an interest in involvement and provide a link between the customer involvement team and the operational managers and support teams. They also 'champion' involvement with their peers and customers.

Training sessions were held to which operational managers and their champions were invited. At the sessions the customer involvement outcome star was presented and the operational managers and champions were asked to start thinking about where they thought their scheme currently was, how involvement could be developed and to feed this back to their teams.

In September 2010 we held a launch event for all staff. At the event all the information and documents the teams would need to start getting their customers involved were available to take away. The customer involvement manager and officer were also on hand to answer any questions the teams had.

## Stage two

After the launch all teams were asked to speak to their current customers about involvement and feed back the responses to the customer involvement officer. This proved to be a difficult task and we had to extend our original deadline to mid December.

To ensure that the message about involvement was getting through to all staff, the customer involvement officer attended team meetings within all schemes to give more information and iron out any issues. He also began monthly meetings with the customer involvement champions to help maintain momentum and to build good communication links. Articles on progress were also included in both the staff and customer newsletters.

By **February 2011** we had **1138** customers on the database - an estimated **80%** of the total number of customers across the organisation.

With the laborious task of getting all current customers onto the database almost completed, the next stage was to ensure that the teams continued to inform us about *new* customers coming into their scheme. In addition, as over three months had passed since we first started receiving forms, the teams were also now sent lists of customers who had originally said 'no' to ask them about involvement again.

## Developing the opportunities

With 13 different opportunities to launch we wanted to ensure that each one was carefully considered, planned and developed. Because of this we are launching the opportunities separately to allow time to get them running smoothly before moving onto the next and the order in which we launch is decided by how many customers have chosen a particular opportunity.

To ensure that customers don't think we've forgotten about them, everyone who says 'yes' receives a letter from us that confirms which opportunities they're interested in. It also explains that it may be some time before they are contacted, depending on what their choices were.

Where possible all correspondence is passed to customers through their support workers (support workers are provided with a copy for their files too), this saves on postage costs and make sure that if literacy is a problem the support worker can explain what the information says.

## Involvement Group

Customers who came to the original meeting where we designed the documents were asked at the time if they would like to be part of the involvement group. Some did and they helped us choose the 'customer approved logo' (the top one is the one they chose).

The logo now appears on all documents that have been seen, commented on, changed and agreed by customers. Most of our promotional leaflets now have the logo.



## Recruitment Panel

We had already had some success early in 2010 involving customers with Brighter Futures recruitment of staff. A training session was held and customers attended interviews for [90 Hope Street](#), [Partnership Housing](#) and the [Staffordshire Mental Health Helpline](#). We gathered feedback from both customers and operational managers about how well they felt the process worked and we made changes to reflect their feedback.

Using the new database we re-launched the recruitment panel opportunity. Almost **200** customers had expressed an interest in being involved in recruitment and were sent a letter (or contacted through their support worker if literacy was an issue) asking them if they would like to attend an information session where they could learn more about the process. **30** people responded and **15** came along to the session. All of the customers who attended this session then booked onto the half day training sessions which ran in February. **7** customers attended and completed the training which was designed and delivered by the training manager and customer involvement officer. Customers that have completed the training will only be invited to interviews within the schemes that they use. [Safe Spaces](#) were the first to invite a trained customer to interviews and feedback from both the customer and other interviewers was very positive. We have also had a customer on the panel for recruitment in [Chepstow House](#). The information sessions and training will continue to run quarterly.

## Focus Groups

Some schemes have regular, effective groups already running. To ensure that all customers have the same opportunity to be part of a group we developed a procedure and standard agenda for schemes to follow. [Safe Spaces](#), [The Clubhouse Network](#), [ECHO](#), [the Arts Community](#) and [Chepstow House](#) have since adopted the new agenda. [Smartmoves](#) and [Community Housing](#) have held their first meetings and there are plans in place for the other schemes to follow soon. Since the launch **110** customers have been involved in focus groups across the organisation.

We have held the first of two focus groups for [Learning Disability](#) customers to review and develop their welcome pack. The first meeting was very well attended and customers gave valuable feedback on the draft version of the pack. Customers were also keen to have their photographs included on the back of the packs to highlight to other customers that they were involved in the development of it. A second meeting is being held to finalise the pack.

All feedback from these meetings is being recorded centrally and any action points are followed up to check we are doing what we say we will do. Focus groups are held at least quarterly, or more often if the scheme feels this is necessary.

## Suggestion Boxes

For appropriate schemes one of the quickest ways for customers to give feedback or make suggestions is to use the suggestion box. We have purchased purpose made, clear plastic boxes and issued them to schemes along with a short procedure for their use. This is to ensure that a nominated person checks that paper and pens are available and that the box is regularly emptied. Suggestions in the boxes are then discussed and, if possible, actioned at the next focus group meeting. This system has already worked well in [Chepstow House \(3 suggestions\)](#) and [The Clubhouse Network \(3 suggestions\)](#).

## Business Panel (Policy and procedure review)

For most operations throughout the organisation there is a policy and/or procedure to follow. Each of these have a direct effect on the customers we support and therefore it is important that customers get the opportunity to comment on them and feedback if we do what we say we will do. For the housing schemes who are funded by Supporting People, customer involvement in reviewing policies is a requirement of the Quality Assessment Framework (QAF).

We have highlighted three policies/procedures that we initially want to get feedback on from customers; [health and safety \(2 customers attended\)](#), [equal opportunities \(2 customers attended\)](#) and [complaints — not yet held](#). There are just over **100** customers on the database who have expressed an interest in being part of the business group. These customers will be sent information about the policies we plan to review and asked to let us know which ones they would like to be involved in looking at. We have arranged three meetings to which interested customers will be invited to.

## Questionnaires and email group

To ensure we have as much feedback as possible on the policies we will link this opportunity to two other opportunities; the email group and the questionnaire group. This should provide a broad bank of feedback from across the organisation.

## Lessons learnt

The scope for customer involvement is huge. During the first few weeks and months of the planning process the temptation was to do everything straight away. We quickly learned that this would be unmanageable and were able to break plans down into clear steps.

Getting staff on board with what we are trying to achieve has been by far the most challenging issue we have faced and continue to face. We recognise that customer involvement goes on all the time across the organisation at scheme level. But gathering the evidence for this and ensuring that feedback on what happened and changed as a result of involvement relies on staff recording and reporting it to us. We know that teams already have lots of paperwork to complete for each customer and involvement is seen as another addition to this.

We also need to work on changing the perception that getting the form filled in is the main objective. The main objective is to support customers to fully understand what is involved in each opportunity and for the support workers to guide their customers to choose opportunities that will nurture their strengths and interests. We are working with the senior managers to look at how we can incorporate involvement into the outcome star process. This should encourage involvement to be a discussion rather than a form filling exercise which will then be reviewed regularly along with the rest of the customer's goals.

We will also be working with Human Resources and the Training Manager to ensure that customer involvement is at the heart of recruitment, induction and support worker training so that all new staff recognise involvement as part of the support they offer customers.

Another issue we have encountered is communication with staff. We use various methods of communication including: holding events and meetings, attending scheme level meetings, email, staff newsletter and meeting with individuals on an ad hoc basis. No one of these methods has proven to be better than the others and communication about what is happening and what is available to customers remains difficult.

The champions meetings were initially poorly attended but this is improving and the style of the meeting has changed from being an information giving session to more of a group discussion where issues are raised and resolved.

We will continue to work with champions, staff and operational managers to work out the best ways to get information to them.

## **Planning for the year ahead**

Soon after the introduction to the customer involvement outcome star meetings we met individually with managers to assess where their scheme was on the star. We concluded that apart from a few schemes, most were at similar levels and that progression would quickly be made as the new processes and procedures developed.

Each scheme has an action plan for involvement which started at the beginning of April 2011. This year schemes will have a generic plan rather than a individual plan. This is because a lot of the work that we are doing centrally will have a considerable impact on the levels of most of the elements of the star in every scheme. This work includes improving feedback to customers, ensuring that all customers have the same opportunities and ensuring that all staff have a clear understanding of involvement and can support their customers to make informed choices.

We aim to have all the opportunities running by the end of March 2012. We also hope that by then we will have developed a well-trained, well-informed, motivated group of customers who will help us to continue developing involvement into the next year and into the future.

Emma Robertson  
Communication, promotion and customer involvement manager  
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