

CLIENT CASE STUDY

Using Covalent to manage customer feedback at Adur & Worthing Council Services



Worthing Borough Council selected Covalent as its corporate performance management solution in April 2005. Following a short, effective implementation and training programme, Covalent was rolled out across the organisation.

In April 2008, Worthing merged with Adur District Council and the experiences of the previous implementation and training were useful as they moved forward with partnership working across newly-formed Adur & Worthing Council Services. This included a programme of re-education for senior management in the key attributes of Covalent, which again resulted in top-level buy-in and enthusiasm for the software across both Council Services.

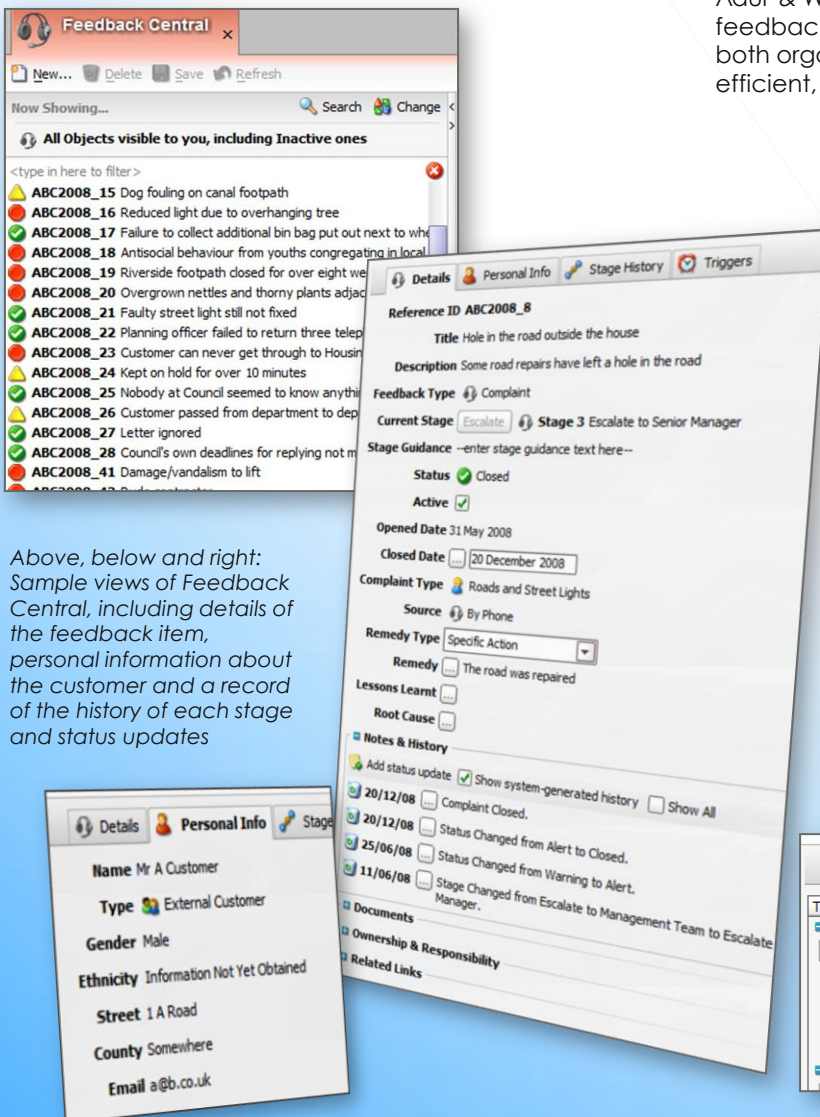
Piloting the Feedback module

Adur & Worthing were involved in developing and piloting a new Complaints module (now called the Feedback module), along with South Lakeland District Council, which was launched by Covalent in 2008.

The business benefits

This module provides a comprehensive feedback management system where each **complaint, compliment, comment and Freedom of Information request** is recorded, monitored and reported to track every stage of a complaint from initial contact through to resolution and lessons learnt, which is **essential for future service planning**.

Adur & Worthing regard effective handling of customer feedback as the necessity to drive service improvement across both organisations. This in turn should provide a high-quality, efficient, cost-effective and customer-focused service.



Above, below and right: Sample views of Feedback Central, including details of the feedback item, personal information about the customer and a record of the history of each stage and status updates

The council uses Feedback Central to record **due dates** on complaints.

'This allows managers to see the traffic-lighted status of each item at a glance, thereby providing an early warning of service delivery failures, and helps with exception reporting to target areas where action is needed.'

Adding commentary and uploading relevant documentation to a particular complaint, compliment or comment enables managers to keep all appropriate evidence in one place for ease of reference.

'By linking actions to feedback where there are lessons to be learnt, managers can easily see the related plans that are in place to improve specific services.'

Alan Balkham, Performance Officer, Adur & Worthing Council Services

Title	Final Status	Due Date	End Date
Initial complaint logged	OK	20/06/08	31/05/08
Add status update <input checked="" type="checkbox"/> Show system-generated history			
31/05/08	...	Complaint created default stage is Initial complaint logged	
31/05/08	...	Status Changed from Unknown to OK.	
Escalate to Management Team <input type="checkbox"/> Warning <input type="checkbox"/>			
		21/06/08	11/06/08

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Automatic notification when action is needed with triggers

Below: Example of trigger set up to notify selected recipients when an item of feedback is due for review

Trigger when Feedback approaching Due Date
 Feedback changes status

Range **14 days before**
 15 days after

Span: 39

Triggers

Trigger	Email	Notice
Feedback approaching Due Date: Every 7 days, starting 14 days before and	Yes	Yes

Trigger when Feedback approaching Due Date
 Feedback changes status

Range **14 days before**
 15 days after

Fire every 7 days

Firing Dates 11 June 2008, 18 June 2008, 25 June 2008, 2 July 2008, 9 July 2008

Notification Method via Email
 Post Notice to Home Page

Recipients Administered By
 Managed By
 Assigned To
 Portfolio Owners
 Send to inherited owners

Other Recipients
 Additional Message

The ability to set **triggers** based on change of status or when an item approaches its due date is a key strength of the Feedback module.

'Managers have the peace of mind that relevant members of staff will be automatically notified by e-mail when action is needed without having to manually check progress.'

Alan Balkham, Adur & Worthing Council Services

Assigning ownership for confidentiality and relevance

Ownership & Responsibility

Responsible OUs Housing, Health & Community Safety

Administered By Balkham, Alan

Managed By Executive Head of Housing, Health & Community Safety

Assigned To (None)

Portfolio Owners Worthing - Cabinet Member for Improved Customer Services

Also Visible To All users

Another key element of Covalent's functionality is the ability to limit the **ownership and responsibility** of each item and assign relevant **permissions**.

'This means that confidential items are only visible to certain members of staff, and relevant managers and members can log in and monitor the progress of a complaint's resolution.'

Alan Balkham, Adur & Worthing Council Services

Above: Levels of ownership and responsibility set up for a feedback item on the council's Covalent site

Developing organisation-wide procedures with customised guidance

*'You are also able to **customise your own guidance** for each stage of the process, so that you can develop council-wide procedures for feedback handling, which is particularly important for **standardising working processes** across Adur and Worthing councils.'*

Alan Balkham, Adur & Worthing Council Services

Complaint Stages

Stage 1: Speak to a member of staff

Stage 2: Contact the Executive Head of Service

Stage 3: Ask the Chief Executive to review the complaint

Stage 4: Contact the Local Government Ombudsman

Stage 97: Priority Letter direct to Strategic Director

Stage 98: Priority Letter direct to Executive Head of Service

Stage 99: Priority Letter direct to Chief Executive

Stage Order 1

Title: Speak to a member of staff

Stage Guidance: The customer should speak to a member of staff, or telephone, or write to the person they have been dealing with, explaining their complaint. If the customer prefers not to contact that person they can contact their manager. If the matter is not immediately resolved to the customer's satisfaction, we will send a copy of our Comments, Compliments and Complaints leaflet with our Stage 1 response and advise them how to appeal.

Check Progress: 14

Days Until Due:

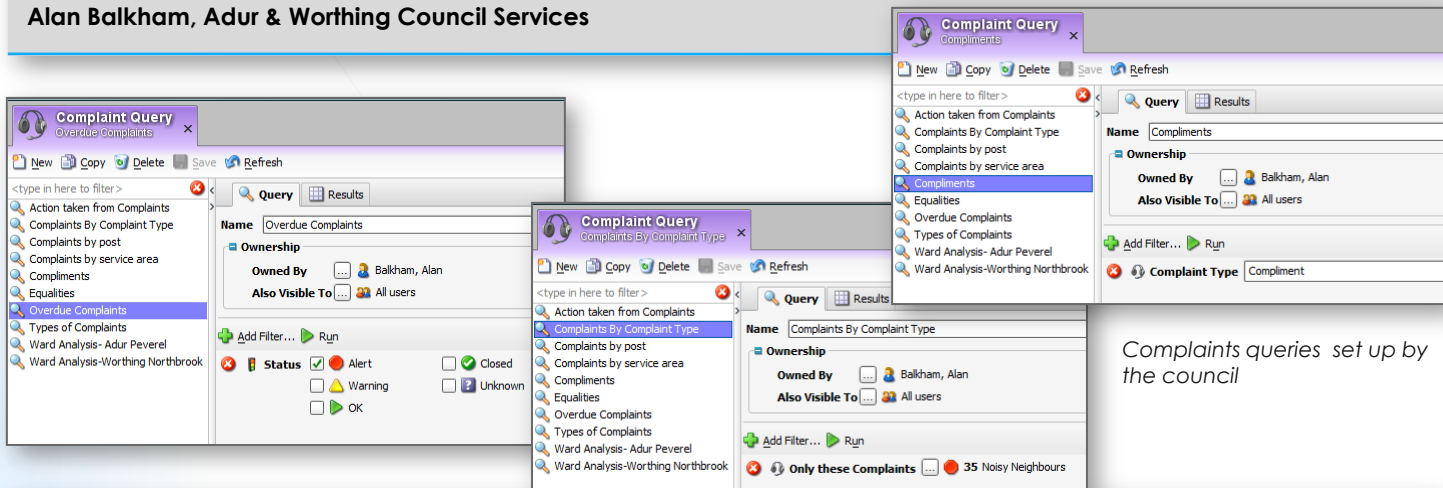
Above: Covalent allows Site Administrators to set up customised feedback stages and to add guidance for each stage

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Queries: one-click generation of selective data

The council has set up a number of queries which can be generated at the click of a button for up-to-date information. 'You can run queries by category, such as overdue complaints; feedback by type; and feedback by ethnic group, which helps with meeting local government requirements for measuring **Equality and Diversity**.'

Alan Balkham, Adur & Worthing Council Services



Complaints queries set up by the council

'We record the ward details for each complaint which enables us to examine **feedback on neighbourhoods** within the council's boundaries. This is ideal for informing local councillors of particular issues within a geographical area. Conversely, by running **location-based queries** on compliments, we can see where good practice is being demonstrated.'

Alan Balkham, Adur & Worthing Council Services

Rolling out the Feedback module

Adur & Worthing have ensured that they have senior management and member support for this project so that top-level enthusiasm will help to drive the use of Covalent for managing feedback going forward. The module will be launched internally with a staff training programme. To promote the concept of the management of customer feedback, the council will use their website and local residents' magazine.

Reviewing county-wide procedures

'As a partnership, we are keen to develop a common, consistent approach to managing feedback using Covalent and have set up a **Complaints Review Group** which includes representatives from all the service areas at Adur and Worthing Councils. We are also a member of the **West Sussex Council County Working Group** which enables us to review county-wide complaints practices by drawing on discussions with other members of the group. These meetings are a great way to fulfil Government requirements for working together as a community to improve services, and feedback management is high on the agenda.'

Alan Balkham, Adur & Worthing Council Services



Above: An issue of Worthing Borough Council's local residents' magazine

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Demonstrating the council's responsiveness to feedback with Covalent

The Feedback Module is **part of the holistic suite of modules** within Covalent's CPM system, rather than simply an add-on for recording feedback. The module helps Adur & Worthing to manage customer feedback very effectively and thereby to meet local government requirements.

Covalent is enabling the council to work towards a **clear and consistent approach** to managing customer feedback and the important local improvement plans arising from it.

'We are developing a refined process for recording, reporting on (see reports below) and analysing customer views through Covalent which will demonstrate the council's responsiveness to feedback. At the end of the day, we want to show customers that voicing their opinion can make a difference, and I am confident that Covalent is the tool to help us achieve our goals.'

Alan Balkham, Adur & Worthing Council Services

Current Stage Title	Description	Complaint Type
Incorrect recovery action	Received summons-already paid	Ask the Chief Executive to review the complaint
Incorrect parking ticket	Bay suspended for street cleaning after parked car	Contact the head of service
Excellent service on the telephone	Friendly, efficient and polite	Contact the head of service
Letter from MP addressed to Chief Executive	Delay in introducing new swimming facility	Ask the Chief Executive to review the complaint
Access to Leisure Centre	Disabled ramp icy up	Speak to a member of staff
Vandalism in town	Graffiti on seatfront	Contact the head of service

Complaint Type	Reference ID	Title	Current Stage	Complaint Type	Source	Due Date	Managed By
Aquarena	40	Opening times of swimming pool	Stage 2	Aquarena	By Phone	31/01/2009	Executive Head of Leisure Services
Compliment	50	Excellent service on the telephone	Stage 2	Compliment	By Letter/Post	28/02/2009	Executive Head of Customer Services
Compliment	52	Repairable theatre show	Stage 2	Compliment	Completing form	31/01/2009	Executive Head of Leisure Services
Letter direct to Chief Executive	25	Noisy Neighbours	Stage 3	Letter direct to Chief Executive	By Phone	14/01/2009	Executive Head of Housing, Health & Community Safety
Parking Enforcement	49	Incorrect parking ticket	Stage 2	Parking Enforcement	By Letter/Post	14/01/2009	Executive Head of Technical Services
Payment Arrangement	45	Incorrect advice given	Stage 2	Payment Arrangement	Completing form	31/01/2009	Executive Head of Planning, Regeneration & Wellbeing
Payment Arrangement	55	Incorrect Council Tax bill	Stage 4	Payment Arrangement	By Phone	28/02/2009	Executive Head of Customer Services
Public Health	41	Deep fouling path	Stage 3	Public Health	Councillor Call For Action	31/03/2009	Executive Head of Housing, Health & Community Safety

Extracts from reports created in Covalent to submit to senior managers. Left: Complaints by Sources report generated in HTML format. Right: Comments, Compliments and Complaints report showing complaint types, generated in MS Word format