



Assessment Report

CUSTOMER SERVICE EXCELLENCE





1. EXECUTIVE SUMMARY

Following the assessment, CrossReach- The Bungalow were found to have a deep understanding of, and commitment to, Customer Service Excellence. The commitment was displayed from Senior Management levels through to operations and front-line staff.

I would like to take this opportunity to thank those people involved in the overall assessment process. It has been a pleasure meeting with your team and having the opportunity to observe your service in action.

The outcome of the assessment was –

“Renewal of the Customer Service Excellence Standard has been recommended”

Address:	Arduthie Street, Stonehaven, Aberdeenshire, AB39 2EY		
Standard(s):	Customer Service Excellence	Accreditation Body(s)	UKAS
Representative:	Kathleen Keith		
Site(s) assessed:	The Bungalow	Date(s) of audit(s):	09-09-2019, 10-09-2019
Lead Assessor:	Robert Sullivan	Additional team member(s):	
Type of Assessment:	Renewal		
Review of Certification Claims	Claims are accurate and in accordance with SGS guidance		



2. CONTEXT

CrossReach- The Bungalow is in the centre of Stonehaven within 5 minutes' walk of the beach and the shops. It is a purpose-built home for adults where each has their own bedroom with wash hand basin.

The service delivers 24-hour care, and benefits from domestic and administrative support. You provide a long-term quality residential service for adults with learning disabilities and complex needs. You promote the growth of the whole person, emotionally, spiritually, physically and intellectually, meeting Service Users' identified needs through Person Centred Planning and delivery.

The stated aim of The Bungalow is to "provide a long-term, quality residential service for adults where the growth of the whole person including emotional, spiritual, physical and intellectual needs are met through person centred planning".

The unit includes specially adapted bath and shower rooms, a communal lounge and conservatory area with large multi- media system, and a specially designed sensory garden including decking areas and water features. Your Yurt/ Summer House is used as a storytelling/ relaxation area as well as the previously completed Summer House being brought into service as a sensory environment.

Your decking area is fully accessible and has a ramp to improve access.

There is also an enclosed garden with an area for sitting out, formal mature flower beds and a parking area.

You continue to develop new facilities on an ongoing basis to meet the changing needs and preferences of your customers and considering Best Practice.

The aims of the Service are:

- To value and respect the worth and dignity of all customers.
- To deliver a personal care service which has, as its main aspiration, customer satisfaction.
- To promote a 'key working' system which provides individual care to Service Users.
- To ensure customers establish and maintain contact with people who are important to them and that they are included as valued members of society.
- To ensure decision-making is through communication with customers, parents, carers and other relevant professionals, thereby enhancing the quality of life for customers



Each customer has a 'Personal Plan' which is a written programme of their preferences and needs developed by professional and other carers, family and friends who are regularly involved with the customer. The plan is co-ordinated by their keyworker and reviewed regularly. This ensures continuity of care towards each customer, giving them a sense of security and well-being.

The involvement of family and friends is encouraged at all levels. They may visit at any time and are encouraged to take part in any events or activities. Their views and opinions are sought, valued and acted upon where appropriate. You seek to continuously improve on this aspect of your work.

The Bungalow is an integral part of the community and the young adults/customers are encouraged and supported to participate in community life. This includes walks and shopping trips, sport, entertainment and Church life.

Over the past few years, The Bungalow has made strenuous efforts and has been successful in organising and delivering a range of small and larger events to benefit its customers and the wider community. Throughout the Customer Service Excellence assessments, it has been clear that you are innovative and creative in ways that involve the wider community.

You continue your commitment to be part of the wider community through 'giving back', an example being your donations to wheelchair riding for the disabled. You have also had recent involvement in the local Feein Market, leading to increased publicity and engagement in the local community.

The Service also freely contributes to the wider community through sharing its expertise and it hosts many students from such as Robert Gordon University on an ongoing and longstanding basis.

3. METHOD OF ASSESSMENT

The assessment was undertaken in two stages; the first was a review of your self-assessment submission. This review enabled the assessor to gain an understanding of how the organisation has met the requirements of the Customer Service Excellence standard.

The next stage was to review the actual service delivered on-site. This was conducted through reviewing practice as well as speaking to staff, partners and customers. This included following customer journeys through your processes and how these aligned with customer insight.

During the assessment process, the criteria are scored on a four-band scale:



COMPLIANCE PLUS - Behaviours or practices which exceed the requirements of the standard and are viewed as exceptional or as exemplar to others, either within the applicant's organisation or the wider customer service arena.

COMPLIANT - Your organisation has a variety of good quality evidence which demonstrates that you comply fully with this element. The evidence which reflects compliance is consistent throughout and is embedded in the culture of the organisation.

PARTIAL COMPLIANCE - Your organisation has some evidence but there are significant gaps. The gaps could include:

- Parts of the applicant's organisation which are currently not compliant and/or
- Areas where the quality of the evidence is poor or incomplete and/or
- Areas which have begun to be addressed and are subject to significant further development and/or
- Areas where compliance has only been evident for a very short period of time

NON COMPLIANT - Your organisation has little or no evidence of compliance or what evidence you do have refers solely to a small (minor) part of your organisation.

The current scheme allows applicants a maximum number of partial compliances, equating to a pass mark of 80% for all criteria.

4. OPENING MEETING

The on-site assessment commenced with an opening meeting.

The assessment activity was discussed. The itinerary had been agreed with CrossReach - The Bungalow in advance. The organisation was informed that all information obtained during the assessment would be treated as strictly confidential.

The scope of Assessment was confirmed as: CrossReach - The Bungalow



5. ON-SITE ASSESSMENT

The Assessor was accompanied throughout the assessment by Kathleen Keith and other personnel within the organisation were involved when assessing activities within their responsibility.

The assessment resulted in the raising of one partial compliance. A number of observations are listed in Section 7 of this report.

	Criterion	Maximum number of partial compliances	Actual number of non-compliances	Actual number of partial compliances	Actual number of Areas for Improvement	Fully Compliant
1	Customer Insight	2	0	0	0	11
2	The Culture of the Organisation	2	0	0	0	11
3	Information and Access	2	0	0	2	10
4	Delivery	3	0	0	0	13
5	Timeliness and Quality of Service	2	0	1	0	9



6. AREAS OF PARTIAL COMPLIANCE

CRITERION 1

No Partials Raised

CRITERION 2

No Partials Raised



CRITERION 3

No Partial Raised

CRITERION 4

No Partial Raised

CRITERION 5

5.3.2 From your published data it appears that you do not meet all of your time of response standards. In particular, your standard of responding to all emails within three working days was not met

7. OBSERVATIONS

During the site assessment, the following general observations were made. These include: positive areas scored as Compliance Plus; areas of good practice; areas for improvement identified throughout the entire assessment process, as listed below.

Areas for Improvement from the previous assessment

- At the last assessment, the Assessor noted that you should consider a more formal evaluation of the annual holiday, including optional activities, to continue to ensure it meets the aspirations as well as the evolving needs and preferences of your customers. You did this and this year several customers were able to take advantage of the very personalised offerings available. In addition, you changed the timing of the annual holiday and several new residents were also able to take part (1.2.2)
- The Assessor noted that you should continue to actively involve customers and other stakeholders in changes to the environment including the ornamental pool area. You have involved staff, relatives and residents in considering this area and are investigating the possibility of removing the pond and potentially installing a swing. You are about to enter a period of intensive consultation and discussion around this and other developments (1.2.2)



- The Assessor observed that the CrossReach webpage could potentially be improved and more tailored. You have started this process with the inclusion of a photograph of residents in use rather than 'stock' photos (3.2.3)
- The Assessor observed some possible risks involved in the use, handling and storage of cleaning materials used at the last assessment. You have addressed this issue with the contractor (3.3.3)

Areas for Improvement

- You have historically made innovative use of social media and continue to do so. You should however give some consideration to the frequency of postings on your social media sites to ensure provision of up-to-date information across platforms and channels (3.2.1)
- On your pull-up marketing material, you have social media logos to identify that information about your service is available on both Twitter and Facebook. While you have devised your marketing taking account of CrossReach corporate branding guidance, you should consider any implications of not adhering to the guidance provided by these Social Media companies in respect of their intellectual assets including logos. In addition, use of the proper logos may more obviously inform customers and prospective customers of your use of these platforms (3.2.4)

Areas of Good Practice

There are many Areas of Good Practice identified below.

- In terms of involvement and engagement you not only involve customers and families but also key stakeholders and some suppliers in your Strategic Development events. The Assessor was able to see evidence of this during the assessment visit. You are aware of the different circumstances of stakeholders and offer many, varying opportunities to be involved with the service and to give feedback (1.2.1)

- You continue with the Good Practice of issuing a 'Carer Review Form' to promote the feedback from carers/ relatives prior to any care review. This allows those involved to consider issues in advance of the review as well as giving those not attending the opportunity to contribute. The service has a small number of customers and there are close working relationships with relatives and others involved with your residents. You use high levels of customer and stakeholder insight to both consult with and review the effectiveness of your consultation (1.2.3)
- You continue to review the effectiveness of your consultation strategies and methods alongside the changing needs of your customers. You have involved a Service User from another service, who is also a Care Inspectorate Lay Assessor, in evaluating your service. In addition, you have run a World Café day to involve the local community in how things could be improved generally for those living in the area. (1.2.3)
- You have a very strong and well evidenced culture and practice of self and customer evaluation not only in terms of care but for such as your activities and events programmes. Your evaluation is used positively and proactively to make improvements to your service. In addition, you make use of surveys such as the CrossReach annual corporate survey to inform you about the levels of customer satisfaction being achieved (1.3.2)
- You continue to develop meaningful activities suited to the specific needs and preferences of individual customers. You also provide a high quality, caring service to your customers. In recognition of this and the various examples of such work, you again were successful in the Scottish Care Awards (2.1.2)
- You continue to 'push boundaries' to ensure the activities such as your annual holiday meets the needs of those attending in innovative ways. The Assessor heard of how the holiday was tailored to meet the evolving needs of established and newer residents and how you used risk assessment to enable residents to take part in a range of enjoyable activities (2.1.2)
- Your staff have exceptionally high levels of insight into the needs and preferences of customers and use this to provide a highly personalised service. The Assessor was able to discuss this with some staff members at the assessment. In addition, your stakeholder feedback always notes the high level of understanding about the needs and preferences of residents(2.1.2)



- You have continued and expanded on the use of E-Learning systems and e-communications technology. This has proven helpful given the relative remoteness of the service to the major centres of population and the travel distance and time involved in attending training and meetings. The flexibility offered using technology also improves the scope for staff with varying shift patterns and other commitments to be fully involved in the service (2.2.1)
- There continues to be very strong leadership in the service with clear direction and support for continuous improvement. Your management team is committed to training and staff are well supported. Staff interviewed indicated that they work in a supportive environment (2.2.1)
- You continue to access tele-conferencing such as Skype/ Web Conferencing to enable you to 'attend' meetings and conferences at a distance as well as for your customers to use with relatives and friends (3.2.1)
- You continue to use digital photography, video and other media to capture key moments, evidence your work and to provide enjoyment and stimulation to customers and others. You are starting to use GoPro action video to give a service-user perspective of activities and routines (3.2.1)
- You continue to evaluate the ways in which customers interact with you. You have a range of analytics across your channels including the reach of key parts of your Social Media (3.3.2)
- Your buildings were clean, tidy and comfortable and this was recognised and highlighted by stakeholders interviewed at this assessment visit. You have a programme in place to ensure appropriate decoration and improvement to amenities (3.3.3)
- You work with partners and suppliers to provide innovative and meaningful services and activities for your customers. The local nursey class and their use of your facilities as well as providing storytelling for the class and your customers is just one example of this. The Assessor was also able to observe and speak with a supplier of a musical based activity (3.4.1)
- You are keen to support, and make best use of, student placements where possible. You ask students for their feedback as well as being involved in more general feedback from students (3.4.3)



- You continue to support the wider community in many ways including the ongoing support of students from Robert Gordon University and Further Education Colleges (3.4.3)
- You monitor your performance against your standards in a variety of ways. You use various methods including video, photography, Skype and your Carer Review form to encourage reflection and review of the care you provide (4.1.2)
- There are several audits and self-assessments conducted by the Service in line with the requirements of CrossReach, the Care Inspectorate and other bodies and these are used as part of a holistic Quality assurance process (4.1.2)

Areas of Compliance Plus

- 1.1.2 You continue to demonstrate and evidence high levels of customer insight about your customers and use this very effectively to better understand their evolving needs and preferences. You achieve this through regular interaction with customers, one-to-one conversations and the care review process. There is an ongoing strength in this area
- 1.1.3 You have made efforts to identify those in the community that would benefit from your service. You have evidenced the fact that you develop your service to meet the needs and preferences of those disadvantaged groups and individuals who may use your service. You tailor the care provided, the environment and the activities provided to meet the needs of individual customers
- 1.2.1 You continue to develop your strategy for engaging and involving customers and others using a range of methods appropriate to the needs of stakeholders. You review and revise this and the implementation of the Strategy has led to an increasing breadth of stakeholders becoming involved with improved results and ideas flowing from such involvement. Your Strategy Development event and Open Days in the wider community are evidence of this.
- 1.2.2 You continually consult with customers at all levels with respect to change to the service. This has involved large communal projects as well as such as bedroom refurbishment and carpet replacement. You are currently investigating options around refurbishment or installation of the jacuzzi bath

- 1.3.5 You have made positive changes to the service through observing current customer journeys. There were many examples of this throughout the assessment. One example that was observed at this visit was your closer links with a local children's nursery class. You have now engaged with them in several ways including hosting storytelling sessions at your service. This is enjoyed both by the children and your customers and as such has been further developed this year. You also continue to expand and improve on the choice of activities available during your annual holiday. You are innovative and creative in your fundraising and use this for innovative activities such as canoeing, orienteering and your activity holidays. The choices are derived from staff and customer input and direct customer insight.

You have changed activities and the care for one individual as a result of changing needs and preferences. In addition, you changed the timing of your annual holiday to allow more time outdoors and cater for a wider range of activities

- 2.1.1 There remains a strong, ongoing and embedded corporate commitment to putting the customer at the heart of service delivery and leaders in your organisation actively support this and advocate for customers. You advocate for customers with other organisations for appropriate service provision and so forth
- 2.1.2 You utilise your very high levels of customer insight to prioritise service improvement activity. This includes the further development and provision of sensory facilities, sensory storytelling, carriage riding and other activities. You are continuing to further develop meaningful activities and therapies such as massage, hydrotherapy and aromatherapy. You are very innovative in this area and are continually looking at ways to increase options available to your customers. The improved choice of activities on the annual holiday is one example of this
- 2.2.1 You demonstrate your commitment to developing and delivering customer focused services through your training and development policies for staff. You have introduced training for staff to meet the changing needs of your customers and taking account of Good Practice and the latest innovations. Some examples of this being training in delivering sensory storytelling and Tacpak to improve interaction with customers. Where you have new customers with specific care needs or where existing customer needs change, you are alert to the need for further staff training and development

- 2.2.2 Your staff are dedicated, polite, friendly and have very high levels of customer insight. As well as very positive feedback both quantitative and qualitative, the number and nature of external Awards received by the service are testimony to this fact
- 3.2.3 You have continued to improve the range, content and quality of the published and web-based information you provide. You continue to develop and refine your Facebook offering in line with evolving CrossReach policies. You also now made your service Newsletter available on social media
- 3.3.2 You evaluate how customers interact with the organisation through access channels and use this information to identify possible service improvements and offer better choices. Your evidence of the ways and extent of your evaluation including the use, reach and effectiveness of Social Media is good. You use this information to inform service developments including your information and service promotion literature and information. In addition, Facetime and Skype is used to involve parents who are not in the country, increasing and improving opportunities to get family feedback on the service and enable people to feel closer to one another by hearing their voices
- 3.3.3 You continue to review the environment, both internally and externally, to ensure that it is clean, comfortable and offers the best environment for your customers. You consider projects to improve the environment in ways that are meaningful to customers and the wider community
- 3.4.1 Your work with other providers and partners to offer and supply co-ordinated services to ensure demonstrable benefits for your customers has progressed further. Examples include your innovative work with outdoor activity providers to continually re-invent possible activities that may suit your customers is another example of this. At this assessment visit, the Assessor observed the work of a third party providing a musical activity
- 3.4.2 You have developed co-ordinated working arrangements with our partners that ensure customers have clear lines of accountability for quality of service and advocate for the customer where appropriate. You act as the central contact point even where services are payable directly by customers/ their relatives to ensure effective communications and joined-up working. The work with the provider of the musical activity seen by the Assessor is one example of this



- 3.4.3 You see benefit in being part of, and contributing to, the wider community and have demonstrated the ways in which you support those communities. You have significantly involved the community in your work and in mutual support over the last year
- 4.1.2 You meet your standards and tell your customers about your performance. You have performed well against the relevant care standards and these are displayed on your noticeboard and website
- 4.1.3 You consult customers and relatives in the setting, reviewing and raising of individual standards provided. Your care planning process is outcome focused and person centred to ensure it meets the changing needs of your customers. Your staff ensure they take account of information from those with knowledge of your customers in this process
- 4.2.2 You can demonstrate that you deliver the service you promised to individual customers and that outcomes are positive for the majority of your customers. The Assessor saw the survey results, spoke to a partner and saw testimonials that demonstrated that you provide an excellent service, and this is confirmed by feedback

8. ACTION PLANNING & NEXT STEPS

The achievement of Customer Service Excellence is an ongoing activity and it is important that CrossReach - The Bungalow continues to meet the elements of the criteria throughout the three years the hallmark is awarded for. Efforts must be made by Customer Service Excellence holders to continually improve their service.

We recommend that you develop an action plan based on the findings of this report. The action plan does not need to be a separate document and is likely to be more effective if the actions are embedded in your normal improvement and service developments plans.

We will undertake an annual review that will look at your continued compliance with the Customer Service Excellence. As part of the review we will also look at progress on any findings of the previous assessments.

In addition to reviewing progress outlined above, we will also review the services delivery, done so by following customer journeys.

For more information on the annual review please refer to our document "Building on your Customer Service Excellence success – Preparing for the annual review".



Holders must inform SGS of any major changes in the service provision covered by the scope of the certificate. This includes reorganisation or mergers.

In addition, SGS must be informed should the certified service experience a significant increase in customer complaints or critical press coverage.

If you are in doubt at any stage, we strongly recommend contacting the Customer Service Team for advice on the significance of any service or organisational change, or issues surrounding customer complaints.

SGS will visit within the next 12 months for the annual review.

SGS recommends that CrossReach - The Bungalow retains a copy of this report to aid continuous improvement, and as a reference document for future assessment reviews.