

Improvement

Customer led transformation programme

Case study – The London Borough of Havering

Over 65s consultation project

Contents

About the London Borough of Havering	4
Background	5
Objective	6
Approach	8
Identifying the target customers	8
Recruiting and training volunteer researchers	11
Designing the consultation questionnaire	12
Promoting the consultation	13
Telephoning residents	13
Consulting with older people	14
Sharing information with partners	15
Outputs	15
Outcomes	16
Benefits to customers	16
Case studies	18
Benefits to partners	18
Benefits to volunteers	18
Resourcing and governance	19
Challenges and lessons learnt	20
Challenges	20
Learning	20
Next steps	22

The customer led transformation programme

The London Borough of Havering's work has been funded under the customer led transformation programme. The fund aims to embed the use of customer insight and social media tools and techniques as strategic management capabilities across the public sector family in order to support place-based working.

The customer led transformation programme is overseen by the Local Government Delivery Council (supported by the Local Government Group).

The fund was established specifically to support collaborative working between local authorities and their partners focused on using customer insight and social media tools and techniques to improve service outcomes. These approaches offer public services bodies the opportunity to engage customers and gather insight into their preferences and needs, and thereby provide the evidence and intelligence needed to redesign services to be more targeted, effective and efficient.

About the London Borough of Havering

Havering is on the outskirts of London, situated 14 miles northeast of the city centre, bordering the county of Essex. It is the third largest London borough, largely suburban with around half of the area consisting of protected greenbelt land. The main town centre is Romford, which forms one of largest commercial, retail, and entertainment districts outside of central London. The south of the borough borders the River Thames.

The population of Havering is 228,400. Around two thirds of residents are of working age, but the borough also has the highest proportion of people over 65 in London. The population is expected to increase steadily over the next two decades, with a large increase in the number of residents aged 85 and over.

Havering is generally considered to be a prosperous area and levels of people living in poverty are relatively low. These are more prominent towards the north of the borough in areas such as Harold Hill, although there are also further areas in Rainham in the South. The health of people in Havering is generally better than the England average. Life expectancy is relatively high, but is worse where there are people living in poverty.

Background

The London Borough of Havering's over 65s consultation project was originally designed to ascertain the needs of residents aged over 65, and increase this group's awareness of the services available to them.

Havering has the oldest population in London, and one that is growing. The London Borough of Havering has the highest proportion of residents over the age of 65 in London, equal to 18 per cent of the borough's population or 40,000 people. Given the large number of older people in the community and the financial challenges of serving them, helping older people to live independent lives in their own homes for longer represents a key challenge for the council. This project demonstrates how customer insight can play a key role in helping the public sector engage this group, understand their needs, and develop strategies based on prevention and early intervention to meet the needs of these customers cost effectively.

"The great thing about customer insight is that it has enabled us to target people who we knew had very little contact with the council. We used the insight and the consultation to understand whether they have any un-met needs that we needed to address. And it has been fantastically successful – we were able to visit over 570 homes and had some spectacular results. One older person ended up being over £100 a week better off after being able to claim benefits that they were eligible to. To them that's the difference between having the fire on during the winter or not."

Cheryl Coppell, Chief Executive of Havering Borough Council

Customer insight provided the basis for a face-to-face engagement project, providing the means to identify target customers, understand older people's communication preferences, promote the work through local media, design the questionnaire, and train the volunteers. Ultimately, the project has also generated substantial new insight into the service needs and lives of older people in Havering.

The project analysed social demographic data to identify those older people who exhibited the greatest potential need for public services. The aim of the project was to reach older people who were most in need of support from the London Borough of Havering and its partners and who may not already be known to partner agencies. Havering's 2008 Place survey found that 55 per cent of people over 65 years felt they were not well informed of council services. Furthermore, only 56 per cent of older residents were satisfied with the council.

The project recruited and trained 29 volunteers to consult with a total of 564 older residents in their homes; in public locations and over the phone. Based on the feedback from customers and the learning generated through the first phase of consultation, the project team refined the scope of the engagement work to focus on addressing (in addition to increasing awareness of services) the needs of older people. Hence, the project evolved from consultation into early intervention work (see 'Approach' on page 8 for further details).

The project is an example of partnership working in action and has included representation from the following services at the London Borough of Havering and external organisations.

London Borough of Havering departments:

- communications
- community engagement and development
- community safety
- customer services
- environmental strategy
- Havering direct
- physical and sensory disabilities team
- corporate policy team.

External organisations:

- Age Concern Havering
- Alzheimer's Society Havering
- HAVCO (Havering Association of Voluntary and Community Organisations)
- Citizens Advice Bureau
- Havering Mind
- Homes in Havering
- NHS Havering
- London Fire Brigade
- Crossroads Care Havering.

For further information on how the project was resourced and governed, see 'Resourcing and governance' on page 18.

Objective

The project was driven by the fact that over 40,000 people in the borough are over the age of 65 and 55 per cent of these – approximately 22,000 people – report feeling unaware of the services of the council and partners provide that could help them. The expected growth in this demographic also presents public services in Havering with an increasing financial challenge, and makes gaining a greater understanding of older people's needs imperative.

The project supported a range of partners' objectives that seek to address this situation, including Priority 7 of the London Borough of Havering's Sustainable Community Strategy 2008-2013 which is to provide older people with: "the right information and support to enable people to live independently at home for as long as possible".

The project also contributes to the London Borough of Havering's Adult Social Services' priority to reach: "vulnerable and needy older people in Havering".

In addition to the local authority's targets, the project supports its partner's work. London Borough of Havering and NHS Havering have a joint strategy to meet the needs of people over 50. One of the principal aims of the strategy is to provide information and advice on health and social care services to empower older people to keep active and healthy.

The project also contributes to:

- Havering Citizens Advice Bureau service plan aimed to "increase and widen access to advice"
- Age Concern Havering's strategic priority to "improve the quality of life of older people in Havering, helping them to maximise their potential to live fulfilling

and enjoyable lives” and to “serve our customers better”

- London Fire Brigade’s (LFB) annual targets fire safety visits, and also helps ensure LFB “contact as many residents, some potentially vulnerable, as possible”.

To support these overarching objectives, the project initially sought to

1. Communicate and consult with people 65 years and over in order to determine what services they currently are using to encourage them to access more services provided by the council and its partners where appropriate.
2. Raise public confidence in the local authority as an organisation which communicates and engages effectively with older residents, and enables the delivery of a wide range of high quality services to them.

However as the project progressed the purpose of the work evolved and a third aim was added, namely to

3. Include services on the questionnaire that facilitate early intervention and also those that help ascertain high level needs which we may not already know about.

The project broke these aims and objectives down into specific targets and tasks by phase. Phase one sought to:

- use customer insight to locate target older residents who were under utilising council services and whose well being would be improved by using them
- focus outreach work on elderly residents that the above insight identified as most in need

- communicate key messages to older people through local media
- recruit and train at least 20 volunteer researchers to conduct consultation with older residents, thereby supporting the development of the volunteers skills and experience
- refer at least 75 older residents to services they need
- engage with at least 250 older people
- raise awareness of services provided by the council partners through the communication and consultation.

The projects’ targets to engage with at least 250 older people and refer at least 75 was agreed with the LGID at the outset of the project based on the capacity of the volunteer team the project recruited. As the Outcomes section illustrates, the project recruited a greater number of volunteers than the planned 20 and they were more productive than anticipated.

Phase two pursued the same targets but also sought to

- engage with a further 250 older people (total project target was 500), making contact by telephone in addition to face-to-face meetings at home or in public locations
- provide at least 75 older people with information about council and partner services as they require (total project target was 150 referrals).

Approach

Customer insight helped inform the methodology that was adopted and helped to tailor the training delivered to volunteers to the target customer groups. The engagement also generated significant new insight for the council.

As the following section illustrates, customer insight featured throughout the project, enabling Havering to:

- identify older people who hitherto had little or no contact with the council
- understand the target customer communication preferences
- design the questionnaire
- train the volunteers
- plan and deliver the consultation efficiently, by plotting the segmentation geographically.

“Using customer insight has been hugely successful. It has demonstrated to us that customer segmentation really does work. If you have accurate and up-to-date customer data sets that you can combine with socio-demographic data, then you can generate some fantastic results and deliver services much more efficiently. It has enabled us to target residents in a very specific way based on the services they may need, and plan the consultation based on a geographic analysis of where our target customer group lived.”

Claire Thompson, Corporate Policy and Community Manager, London Borough of Havering

Feedback and insight generated by phase one was used to adapt and extend the questionnaire to support early intervention and to assess residents’ potential needs more thoroughly, in line with the council’s prevention strategy. The project also generated insight into customers’ needs and the opportunities to use strategies based on prevention and early intervention to deliver better outcomes for residents and the council alike.

The following section outlines the steps that the project went through.

Identifying the target customers

The council used a socio-demographic segmentation of the borough’s population to design and structure the consultation project. The council had previously developed a bespoke social demographic segmentation of Havering’s population with Experian (a data supplier) and the over 65 consultation project served to ‘test pilot’ the use of the customer segmentation for service improvement.

Havering’s bespoke segmentation was developed in conjunction with Experian and was based on combining Experian’s social demographic data with council data drawn from a range of sources including revenues and benefits, education, leisure services, libraries and social care.

The bespoke segmentation differentiated residents according to a range of key indicators including employment status; level of qualifications; benefit eligibility; state of health; and attitudes towards the environment. The aim for the consultation project was to identify older residents exhibiting the greatest level of need.

Based on the segmentation, the London Borough Havering identified a particular segment – named ‘Category I’ – as comprising residents that typically (though not exclusively) exhibit the following characteristics:

- have a low income and are reliant on state pensions or pension credits
- have no savings and may be eligible for social care support
- live in rented accommodation, in terraced or purpose-built low rise OAP flats.

Crucially, the council’s segmentation tool also includes the communication preferences of the residents in each category, and indicated that residents in Category I preferred local papers and face-to-face contact as their method of communication. This insight informed the project’s approach to consultation, questionnaire design and promotion.

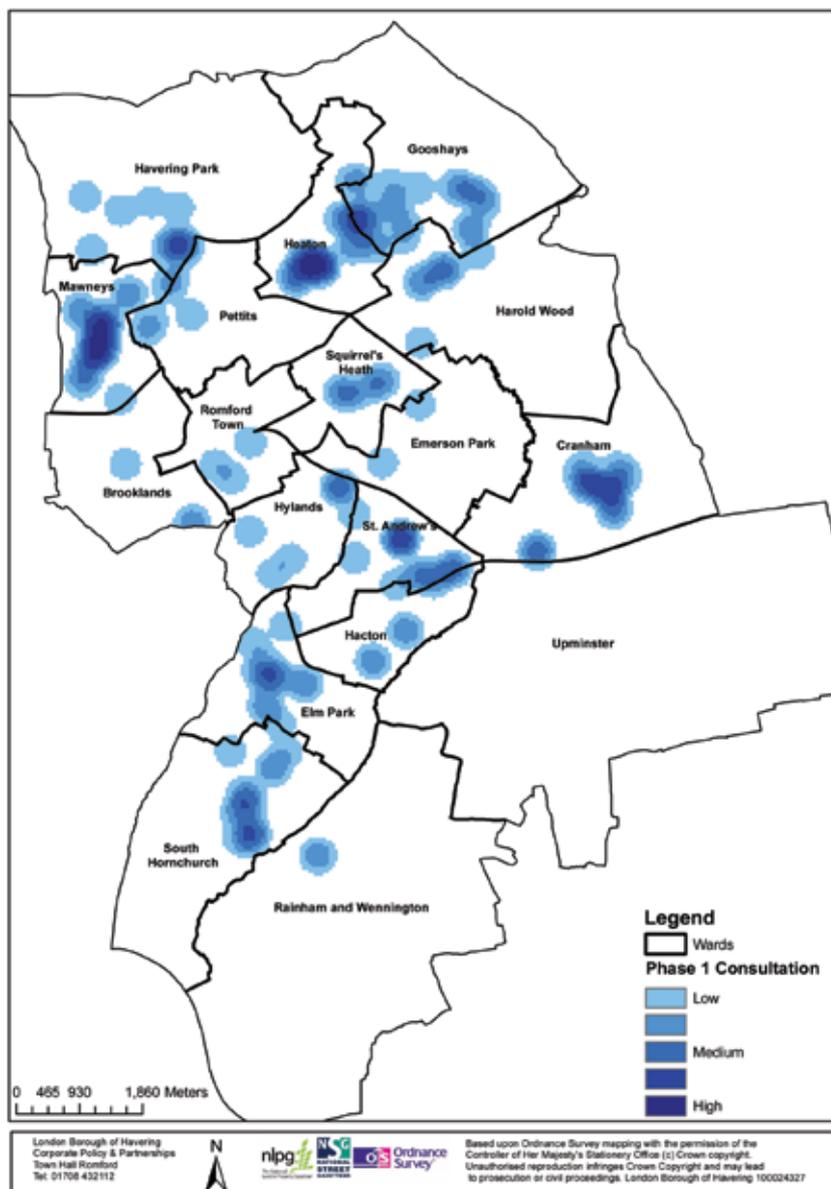
Figure 1: Percentage of Havering households by segmentation

Havering segment	Count of households	Percentage of households
Group A Young affluent singles	6,872	7.36%
Group B Older, affluent families	16,445	17.61%
Group C Young families and couples; comfortable incomes	10,724	11.48%
Group D Families with young children; high earners	7,946	8.51%
Group E Active older people with private pensions	7,075	7.58%
Group F Older families in manual and skilled jobs	5,692	6.10%
Group G Older families in settled suburban semis	15,962	17.09%
Group H Transient; deprived young people not claiming benefits	1,744	1.87%
Group I Middle aged manual workers and pensioners in rented accommodation	14,686	15.73%
Group J Benefit dependent young families and singles in social housing	6,240	6.68%

The project analysed the database of residents from Category I who were over the age of 65 to establish a list of addresses. To ensure that the volunteers' time was used as efficiently as possible, the project then filtered the data further to identify those streets which exhibited the highest population of Category I residents. The project team then grouped these streets by geographical area using GIS (Geographical Information System), which allowed the household visits element of the project to be targeted more efficiently.

Based on this analysis, the project identified a sample of 554 addresses to target in phase one of the consultation. The project re-ran these analyses at the commencement of phase two and identified a further sample of 650 addresses. The graphic below illustrates the geographical spread of consultation broken down by borough ward for phase one. The area shaded dark blue in figure 3 illustrated locations where the most consultation occurred.

Figure 2: Geographical spread of consultation, phase one



Recruiting and training volunteer researchers

Volunteers were recruited at the beginning of both phases one and two. In both cases (mindful of the long turnaround times for CRB checks) the project began advertising for volunteers early in the process. The CRB checks typically took eight weeks (see also 'Challenges and lessons learnt' for further information).

The project used a variety of methods to recruit volunteers, including

- advertising in 'Living', the local authority magazine with a circulation of 90,000 households
- circulating press releases to local newspapers
- participating in interviews and local radio
- promoting the volunteering opportunity on the Havering website
- working through the Havering Volunteering Bureau and Age Concern volunteer forum.

Using these methods, 15 and 14 volunteers were recruited in phase one and two respectively, totalling 29 volunteers recruited throughout the project.

To ensure volunteers understood the services covered by the consultation, the partners provided a full day training session. Furthermore, in order to gain a better understanding of the issues faced by elderly, as part of the phase two the volunteers also job shadowed Havering direct care assessors as part of their induction.

The volunteers also signed voluntary agreements with the project which outlined the roles and responsibilities of the council as an 'employer' and volunteers as 'employees' – though these agreements did not constitute a legally binding work contract. The volunteers were free to choose how they participated in the project, with some only wishing to undertake public consultation events rather than visit people in their homes.

Figure 3: Group photo of Havering's volunteer team



The volunteers were provided with Havering logo jackets and Havering identification badges as well as a copy of the initial contact letter to residents signed by the chief executive of the council. The volunteers worked in pairs, typically in three-hour shifts covering a morning or afternoon.

Designing the consultation questionnaire

Having identified the target customers and recruited the volunteer researchers, the project then worked with the project partners to design a questionnaire to be used by researchers in their consultation with older people.

During phase one of the project, the questionnaire focused primarily on raising awareness of services. For phase two, questions were added to help assess the needs of residents and enable early intervention. Both questionnaires are available to view on the Local Government Improvement and Development Customer Insight Community of Practice, an online forum.

Figure 4: First page of phase two questionnaire

The image shows the first page of a questionnaire titled "Services for the Over 65s". At the top left is the "Let's talk" logo, and at the top right is the Havering Council logo. The title "Services for the Over 65s" is prominently displayed in the center.

The form is divided into several sections:

- Personal Information:** Fields for Title, First Name, Last Name, DOB, and Gender (Male/Female). Below these are fields for Address, Postcode, and Telephone.
- Contact History:** Two questions with "Yes / No" options: "Do you know how to contact Havering Council?" and "Have you made contact with the Council in the last 12 months?". A follow-up question asks "If yes, what was it regarding?" with a large text area for response.
- Service Interest:** A section titled "Havering Council and its partners provide a wide range of services, many of which are for older people. Would you like more information about any of the following services: (either by post or telephone*)". It contains two columns of checkboxes for services such as "Carline Community Personal Alarm", "Housing Benefits", "Meals on Wheels", etc.
- Organization Interest:** A section titled "Havering Council works with a range of public and voluntary sector organisations... Would you like some more information about any of the following organisations:". It includes checkboxes for "Alzheimer's Society Havering", "Havering Mind", and "Crossroads Care Havering".
- Needs Assessment:** A series of questions with "Yes / No" options, each with a small "HD" icon. Questions include: "Do you feel you receive the correct income...?", "Do you have any financial problems...?", "Would you like a free fire safety check...?", "Do you need advice or support in caring for a relative...?", "Are you experiencing difficulties with certain aspects of daily living?", "Would you like more information and advice on services that help people to regain confidence...?", and "Would you like more information and advice on services that help people to remain independent in their own homes...?".

Promoting the consultation

The project sought to make target residents aware of the consultation through a sequence of media releases, including newspaper and radio coverage and by contacting them directly by post.

The local council magazine 'Living' carried an article on the consultation. This was supplemented by radio interviews and press releases sent out to the local newspapers. Articles were also posted on the London Borough of Havering's website.

Residents that had been identified by the socio-demographic analyses were also sent a letter by the council that explained the project and that the council would be in contact by telephone. The letter included contact details of the appropriate Safer Neighbourhood Teams, as well as the council's contact details (in case the recipients wished to verify the validity of the letter).

Telephoning residents

To follow up the letter, the volunteer team contacted the target residents by phone (from Havering's customer services call centre) to ascertain their willingness to receive a home visit. Once residents had confirmed their willingness they were then phoned a second time with a predetermined date. Of the 461 people telephoned during phase one, 183 agreed to participate at the first initial phone call. However, 20 people who initially expressed an interest in the consultation when phoned a second time either could not be contacted subsequently to schedule a visit or when contacted were no longer interested in participating. The project team amended their approach somewhat based on this learning.

To lower the risk that residents would 'drop-out' of phase two in this way, the project team allocated specific dates for visits to each street so that volunteers could book their visit during a single call. If it was not possible to



schedule a face-to-face meeting due to the resident's unavailability or their unwillingness to have people in their homes, the volunteers worked through the questions with them over the phone. Of the initial 630 people identified in phase two, 267 expressed interest in participating in the consultation and 18 of these completed the questionnaire by telephone.

Consulting with older people

Face-to-face consultation

The vast majority of consultation occurred at people's homes, and this formed the principal element of the project. A pair of volunteers would visit the address at a scheduled time agreed with the resident and spend approximately 20 minutes working through the questionnaire with them. This face-to-face approach produced the best discussion and dialogue with residents and allowed in-depth needs to be established, as well as any other issues that cropped up in conversation with the volunteer such as community safety issues.

Consultation at public locations

As well as visiting residents' homes, there was also a small non-targeted aspect to this project. Volunteers conducted five consultation events at locations across the Borough including Queens Hospital and St George's Hospital. The volunteers consulted with approximately 30 residents at each event.

Information packs

To support the process and assist the volunteers in conducting the consultation, the project also produced an A-Z directory of council services for the over 65s which detailed all the relevant contact details of council departments. An information pack containing the directory plus leaflets from partner organisations was given to every

resident that filled in a questionnaire, or requested an information pack. In total the project distributed 240 information packs (in phase one).

As part of phase two the project also purchased special aid equipment designed to help people over 65. Items were given to the residents to thank them for completing a questionnaire. These items included extendable reachers; aids to make opening lids easier; plate grips; key grips; arthritic exercise balls; sock pulls; leg lifters; magnifying glasses and non-slip bowls and mats.

Two residents aged 91 and 88 were referred to the Citizens Advice Bureau after requesting assistance on pension entitlements. On referral the couple's income totalled £327.55p/week from State Pensions, Occupational Pension and Attendance Allowance (for the wife). However after the first contact it also became apparent that the husband could be entitled to Attendance Allowance and was consequently awarded a high rate of attendance allowance.

Because both residents are now in receipt of Attendance Allowance and both will be caring for each other, their pension credit will increase and their new weekly disposable income will increase to £516.09. There will also be no rent or council tax to pay due to guarantee pension credit award. This has not only provided an immediate benefit to the residents but as an ongoing figure the long term financial security of these residents has been secured.

Sharing information with partners

The information collected by the questionnaire was input into Havering CRM (Customer Records Management) system and subsequently forwarded to relevant partners based on the needs identified.

During phase one these referrals were released monthly, which led to some partners receiving volumes of service requests that were challenging to cope with. Hence, following discussions across the partnership during phase two, referrals were circulated among partners on a weekly basis. Partners agreed to contact residents referred by the consultation within 28 days of receiving information.

Outputs

The project produced the following outputs

- analyses of a specific customer segment by geographic location (a successful test-run of the social demographic data which the London Borough of Havering has previously purchased)
- consultation questionnaires for working with people over the age of 65
- a media plan for the two phases of the project
- an A-Z directory of London Borough of Havering services for the over 65
- nearly 600 information packs comprising the A-Z directory council services and information leaflets from partner organisations were distributed to the target group
- the consultation and resulting requests for services informed a revision to London Borough of Havering's use of CRM database (see 'Challenges and lessons learnt').



Outcomes

	Phase one		Phase two		Total	
	Target	Actual	Target	Actual	Target	Actual
Questionnaires completed	250	227	250	337	500	564
Volunteers recruited	10	15	10	14	20	29
Customers referred	75	227	75	337	150	564

Furthermore, each customer referred made an average of six requests for service or information – amounting to 2,824 additional service requests. Moreover, these new requests have arisen from a group of customers that had been identified as having a high level of need but who would previously have been unknown to the ‘system’ and without this project would likely have remained underserved.

Benefits to customers

As part of the evaluation, the project contacted 60 residents who completed questionnaires to understand their experience of the consultation.

95 per cent of respondents reported that they had benefited from being part of the consultation, principally by being better informed about services that are available to them are more confident about accessing them.

89 per cent of respondents felt that the face-to-face approach was a positive step that helped to raise the level of engagement with the council and awareness of the services provided.

The tables below illustrate services requested by residents following phase one and phase two of the consultation.

Figure 5: Most requested services – phase one

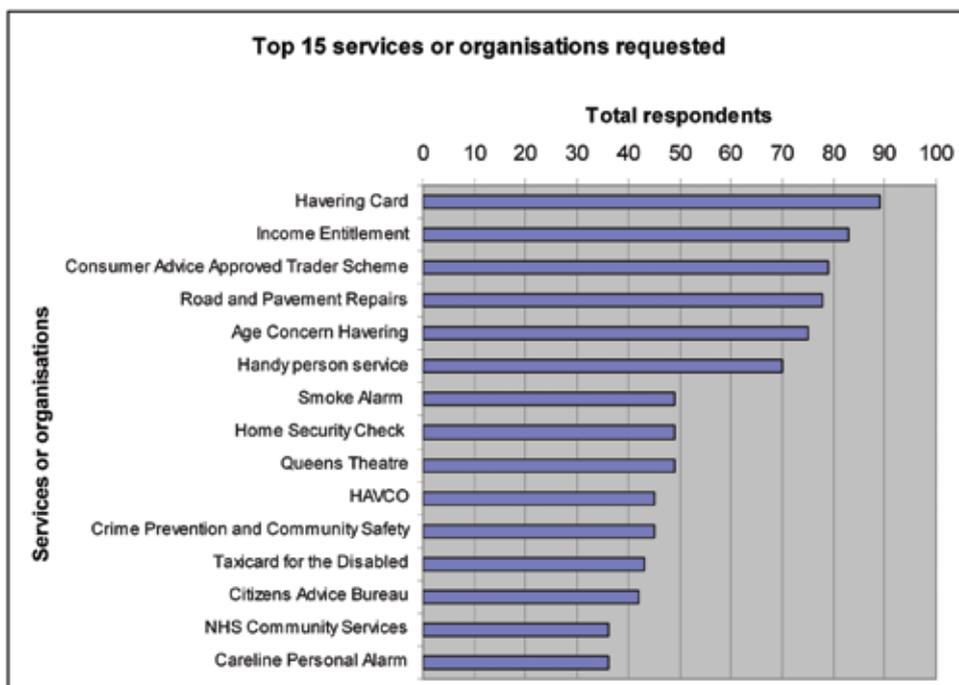
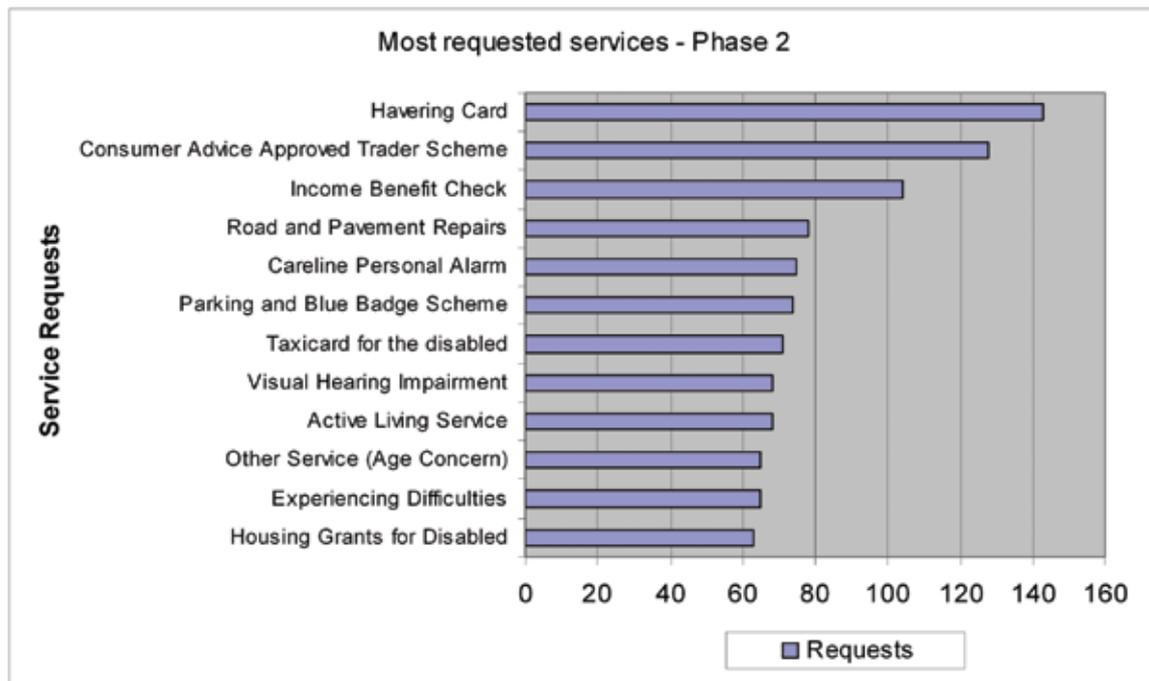


Figure 6: Most requested services – phase two



The high number of requests for services that benefit people's well-being identifies the importance of early intervention services – such as the Careline personal alarms; the Taxicard scheme for the disabled; visual and hearing impairment assistance. The graph illustrates how the consultation identified health and well-being needs which may not have been identified had the work not occurred and in which can generate greatly increased cost to the taxpayer further down the care pathway.

In addition to these requests are, for several months following the consultation the volunteer project manager continued to receive calls on issues faced by residents. This illustrates how the project has helped to raise confidence among residents to contact the council and ask for advice, whilst also promoting a central point of contact.

Based on phase two alone, the Citizens Advice Bureau secured over £64,806 during the four months to the end of March 2011 in unclaimed benefits for residents.

Although most of this figure comprises one off payments, approximately one third of the figure represents ongoing payments that will continue to be paid to people on a regular basis. For more detail the difference this is made to individual people's lives see 'Case studies' below.

One resident requested assistance from Havering Direct (HD). They were consequently referred to an occupational therapist but also had an issue outside the remit of HD concerning a Taxicard. The resident who was relatively restricted in terms of transport was unable to go to the local library to complete a form. Through discussions with a representative at HD the resident was given confidence to approach a neighbour who offered to take the person in question. Such was the success of this the resident in question and neighbour now go on weekly shopping trips together.

Case studies

The following section outlines examples of how individual customers have benefited from the project.

- An elderly gentleman living in Homes in Havering (HiH) accommodation was concerned about his neighbours' garden which had become overgrown, with brambles extending in to his own back garden. The gentleman in question had no means to clear his own garden and as his neighbour was disabled, she could also not assist. HiH were contacted and the garden was cleared. The disabled resident in question has now been assessed and their garden will be maintained on a periodic basis to avoid the issue from re-occurring.
- A lady in her 80s, was visited by two volunteer researchers and was found to be living in severe hardship. The volunteers made an immediate referral to Citizens Advice Bureau, who identified a number of benefits that the lady was entitled to, and within a short space of time she was £125 per week better off – making a significant impact to the quality of her life.
- One gentleman, over 90 was finding it difficult to use his bath. As a direct result of referring the resident to Havering Direct a bathing assessment was carried. A bath hoist has now been installed as a result. The gentleman now has the confidence to bathe safely and has regained some independence and dignity.

Benefits to partners

In their feedback at the conclusion of project, the stakeholders emphasised that though the financial benefits were important, the project has generated a genuine community benefit over above the financial benefits.

Through using face-to-face contact, the partners gained an opportunity to ascertain

customers' needs in depth. Given the financial pressures that a growing elderly population will place on the council and its partners going forward, the insight generated by the consultation exercise offers the means to pursue preventative approaches to meeting customers' health and social needs which should prove more cost-effective in the long-term.

As the graphs above illustrate, the project has increased the number of residents known to both council and partner services. Many of the 564 residents consulted had hitherto been regarded as 'hard to reach'.

Furthermore, feedback from customers indicates the consultation, particularly the face-to-face approach that the partners took enhanced the reputation of the council and local service providers with the target group. The 89 per cent of respondents felt the project was 'a positive step'.

A conservative estimate of volunteer hours given to the project is 1,152, equating to a saving of £6,831 as a standard minimum wage of £5.93 or £14,400 were volunteers paid the national census wage.

Based on the experience and learning generated by the project, the Citizens Advice Bureau has assigned a volunteer to work solely on issues faced by people over 65.

Benefits to volunteers

In addition to benefits seen by Havering council, volunteers gained valuable skills in social research, customer service and experience of working with elderly residents. Improving skills of volunteers residing in Havering will not only benefit any potential projects that wish to tap in to this resource but will also hopefully empower others to become involved in volunteering after seeing positive experiences of those involved.

Over half the volunteers recruited to the project had not volunteered previously. The projects ethos and outcomes are therefore clearly viewed as positive and worthwhile in undertaking. Furthermore many of the volunteers involved expressed a clear desire that the project should not cease (this is elaborated on under ‘volunteers’)

London Borough of Havering now has a ‘pool’ of volunteers that could be utilised for future projects not limited solely to projects relating to the elderly. All volunteers were asked about their willingness to volunteer on future projects and if they were happy to be contacted by the London Borough of Havering regarding future volunteering opportunities. All replied yes.



Resourcing and governance

The work was overseen by project board which met every six weeks and comprised the:

- chief executive
- group director for culture and community
- corporate policy and community manager
- community engagement team leader
- assistant director for transformation (commissioning).

The project was managed by a community engagement officer using a light version of Prince II project management methodology. Recruitment and training of the volunteers was provided by the Havering Volunteer Bureau – this service was paid for from the project budget.

In terms of budget, the London Borough of Havering allocated some mainstream funding to the project and won a further £50,000 Local Government Improvement and Development’s customer led transformation programme to develop the customer insight element of the project. The majority of the budget went on paying the project manager’s salary, and purchasing small aids equipment, as well as the printing costs of the information packs. An element of the budget also paid for our voluntary sector partners’ time on the project, in delivering training to the volunteers and in some instances, to cope with the increase in demand for their services which the project generated.

Challenges and lessons learnt

Challenges

The project encountered several challenges. These included:

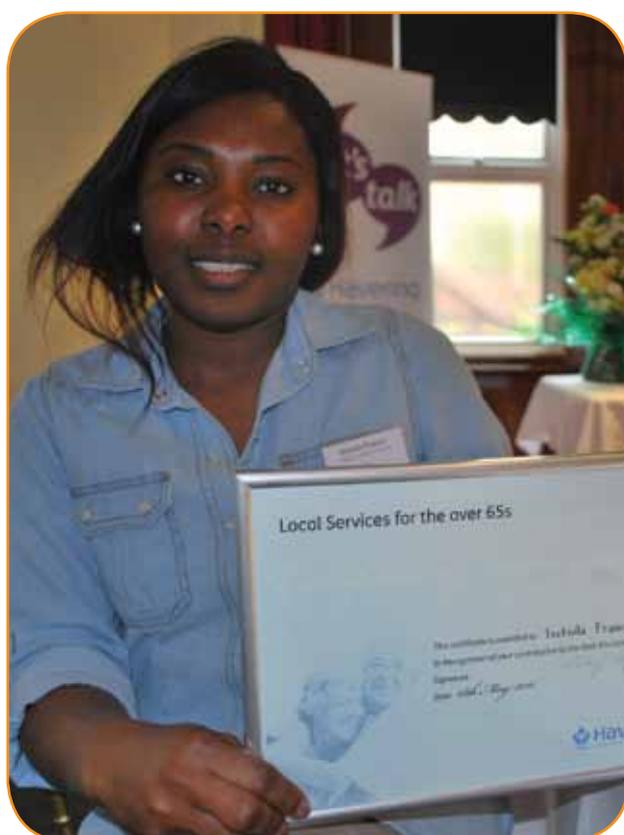
- Before volunteers could be deployed to visit customers, they needed to have CRB clearance. On average, this required eight weeks which meant some volunteers were not ready to deploy at the beginning of each phase.
- In some cases, volunteers were unable to carry out visits assigned to them due to personal circumstances – sometimes at very short notice.
- Though local voluntary organisations including the Citizens Advice Bureau and HAVCO work closely with the council, they were unable to participate in project board meetings due to capacity constraints. Given the role governance plays in ensuring that public money spent appropriately, the voluntary sectors capacity to participate in events like these represents a challenge to the public sector.
- The volume of referrals received following the consultation increased the workloads for the departments and partner agencies involved. In cases where the organisations suffered from staff shortages other work often took precedence.
- Where referrals were made to voluntary sector partners, some of the project budget had to be spent on temporarily increasing their capacity, for instance the CAB noticed an increase in referrals from this project.
- The following up of referrals generated by the consultation resulted in a significant amount of data entry work, which proved time consuming.

- Geographically, Havering covers one of the largest boroughs in London. However, although many of the volunteers were willing to use their car to visit residents legally this was not permitted since to do so would require car insurance covering them for business use. Hence, all visits were done on foot and using public transport.

Learning

- For future projects which deploy volunteers, the project recommends putting in place volunteer agreements stipulating the minimum hours required and minimum notice periods in the event that a volunteer cannot undertake a shift. However, since they are volunteers, these agreements are not legally binding and essentially equate to 'gentlemen's' agreements'. As a contingency, members of council staff should also be identified to cover shifts in emergencies.
- Volunteers can not be expected to understand the internal workings of the council or partner organisations, and require both clear direction and support from the member of staff as well as a central point of contact at the project to facilitate communication.
- Providing volunteers with theoretical as well as practical training proved valuable. From phase two onwards volunteers participated in job shadowing, and the project would recommend this the future projects.

- Based on the experience of phase one, during phase two, if people wished to be involved but did not want a home visit, or were not available on the allotted date, the volunteers worked through the questionnaire with the respondent over the phone. While this approach proved to be the most efficient way of generating referrals, the lack of physical, visual contact lessened the researcher's ability to detect needs beyond those voiced directly by the resident, ie volunteers had no opportunity to witness the resident's physical condition or living conditions.
- In some cases, customers contacted by the council could not recall requesting a service as part of the consultation. To support continuity between consultation and referral the project recommends:
 - leaving a duplicate (carbon copy) questionnaire with the resident
 - leaving a compliment slip listing those services that were requested with the resident.
- The project evolved from phase one and phase two, with the questionnaire developing to collect more detailed information on residents needs with a view to generating referrals. The project recommends continuing this approach and adding sections to collect information on each service area.
- When loaded into computer systems, the information captured by the questionnaire should be grouped by the person's name rather than service request. The project took this approach from phase two onwards, inputting the resident's details and logging service requests against that record rather than having separate records for each request. This approach was more time efficient, but required a change in the way the project used the CRM system.
- To help residents recall the consultation and that they have requested services, future projects are recommended to record both the time and place of the consultation to be able to remind residents of the previous conversations.
- To help the council's departments and partner agencies manage the workload, the project circulated referrals on a weekly basis from phase two onwards. During phase one, referrals had been distributed monthly resulting in a challenging workload for partners.



Next steps

The London Borough of Havering and the project partners see opportunities to use customer insight coupled with volunteering to support a range of improvement initiatives serving older people including:

- promoting the take-up of benefits
- conducting health and safety checks (to identify risks of trips and slips in the home)
- reducing older persons re-admission to hospital rates, by deploying volunteers to support older people when they've been discharged from hospital
- supporting the community safety team to help older people secure their homes.

These initiatives support the London Borough of Havering's transformation programme for adult services, which is focused on early prevention. The aim is to identify and meet the needs of customers before these needs become detrimental to the customer's health and well being and result in service requests or care pathways that are more costly the public service partners to deliver.

This project demonstrated how effective customer segmentations can be to public services in targeting services and consultation and ensuring that vulnerable residents can still have a role in shaping services.



Local Government Group

Local Government House

Smith Square

London SW1P 3HZ

Telephone 020 7664 3000

Fax 020 7664 3030

Email info@local.gov.uk

www.local.gov.uk

© Local Government Group, September 2011

For a copy in Braille, Welsh, larger print or audio, please contact us on 020 7664 3000. We consider requests on an individual basis.