

Review of Avoidable Contacts for Mutual Exchange

Background

The leadership team advised the Scrutiny Panel that there were a high level of avoidable contacts relating to Mutual Exchanges and ask them to review the process and procedure to understand the reasons for avoidable contacts. Avoidable contacts can be defined as instances where customers have had to make contact with us to report that we have failed to do something we said we would, or a contact as a result of a service failure.

Goals

Reduce the number of avoidable contacts.

Objective

- Review the process of the mutual exchange system and procedure.
- Understand the reasons for avoidable contacts.

Scope

- Review the policies relating to Mutual Exchanges, the information provided on the website, and mutual exchange application data.
- Request detailed reports to examine the process and outcomes of Mutual Exchanges conducted during the time period of April to August 2022.
- Meet with Neighbourhood Assistants in the Mutual Exchange team.
- Commission and complete a customer survey on their experience of mutual exchanges covering the period April 2022 and August 2022.
- View the Keyfax script that is used by contact centre staff when dealing with a mutual exchange customer query.
- Review all calls made via the contact centre between April 2022 and August 2022 in relation to mutual exchanges and the reasons and outcomes of the calls.

- Information regarding complaints received relating to mutual exchanges April 2022 to August 2022.

Conclusions

- There is a need for continuous updates of information for both staff and customers.
- There are large amounts of avoidable contacts from customers, for updates that do not correlate with information given during interviews.
- Four members of staff is generally sufficient to manage the service, but holiday and illness can impact on this.
- The contact centre do not always inform customers of time scales for safety checks.
- There would be a benefit to increasing communication with customers throughout the process to help manage customer expectations on time scales.
- There is often conflicting information which leads to confusion with moving dates.
- There is a different time scale between the mutual exchange policy and information on the website regarding when safety checks should be done.

Recommendations & Response

Recommendation	Response
<p>Platform to create a portal for mutual exchange progress to give information to all staff and customers, this will reduce avoidable contacts by keeping customers informed at every step to manage their expectations. A portal would ensure customer queries are always answered.</p>	<p>The Swap Tracker portal will provide visibility to customers with online access of the progress of their application as well as allowing them to upload and receive key information so should address some of the avoidable contacts. Swap Tracker is currently in the process of being tested by colleagues and will go live on 14/02/2023. COMPLETED</p>

Recommendation	Response
<p>Have available one or two trained staff to assist the mutual exchange team when required due to staff shortages and increased volume of applications.</p>	<p>We will explore the scope of training additional resources to step in and provide cover in times of high volumes or colleague absence. We are confident with the implementation of Swap Tracker and the benefits this will bring we will be adequately resourced. The Swap Tracker portal will provide accurate case load information to the manager to ensure that work loads are distributed appropriately and including improved monitoring of timescales on pending tasks. COMPLETED</p>

Recommendation	Response
<p>Call Centre to add safety check timetables to their Keyfax scripts.</p>	<p>We will work with the planners and contact centre managers to review the call scripts. We will explore the introduction of a timetable. If this is not possible, we will seek to improve the general advice given to customers on potential minimum and maximum timescales for checks. The website will also be updated with this information in February 2023. We will also work with the contact centre to amend KeyFax scripts to include Swap Tracker information. This will be done to coincide with the launch of Swap Tracker on 14th February.</p> <p>COMPLETED</p>

Recommendation	Response
<p>Create a customer satisfaction survey to be used after every completed mutual exchange.</p>	<p>We will work with the Customer Experience Team to develop a satisfaction survey on completion of a MX and monitor and review outcomes and implement any improvements accordingly. Scheduled for review January 2024 to implement April 2024</p>

Recommendation	Response
<p>The whole process would be aided if different housing associations work together to benefit from best practice and alignment for time scales on safety checks. Platform could lead on this.</p>	<p>This was explored with other housing associations, who felt there was no need as we all work to a common time frame for decision 42 days but are individually subject to a wide variety of operational constraints such as geography, contractors for safety checks. Mutual Exchanges are heavily statute and process driven and so for the most part organisations are aligned on timescale to consent, tenancy checks, method of exchange (assignment surrender and regrant). Where there are variations it tends to come after the consent period such as exchange dates, timing of safety checks. We do work with the other exchange partners to meet the needs of customers on determining and facilitation exchange dates but there are some constraints due to policies of other housing providers eg some only do Monday tenancy starts. COMPLETED</p>

Recommendation	Response
<p>Make sure the information on safety checks corresponds between the website and the written safety policy.</p>	<p>The policy will be reviewed by the end of March 2023 and we will ensure this is updated. The new website is due to be launched at the end of February 2023 the updated information will be transferred to the new website content. COMPLETED</p>

Recommendation	Response
<p>Call Centre to ask customers if they have received a consent letter. Keyfax script states if mutual exchange was logged longer than 42 days ago the contact is avoidable, consent status is not currently taken into account.</p>	<p>We will amend scripts accordingly re the consent dates to coincide with the launch on Swap Tracker on 14th February. COMPLETED</p>

Recommendation	Response
<p>Mutual exchange team to communicate clearly with precise details and timescales to customers at every step of the process to help manage expectations and keep customers fully informed.</p>	<p>Over the past 12 months we have continuously reviewed. We will strengthen the initial message to customers at acceptance of the application form (when all parties forms are received). The introduction of Swap Tracker will give greater shared visibility of tasks that remain pending for all users. The new system may not make the process faster, but it will give customers a greater view of process and information that remains outstanding. COMPLETED</p>