Customer Service Excellence Commercial in Confidence

Assessment Record

Centre for Assessment Ltd, Churchgate House, 56, Oxford Street,, Manchester, M1 6EU
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Assessment Reference Number	Name of Organisation
14/5167	University of Bolton Library, Student Services , Careers and Reception

	Name of Assessor
Initial / 3 Year Assessment	Tariq Mahmood
Surveillance 1	
Surveillance 2	

This document will be the key record of your organisation's assessment and surveillances. It will cover the whole of your organisation's journey from the first desktop review to the final surveillance activity.

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Section 1 **Assessment Analysis -** this will show the evidence seen by the assessor at each stage of the assessment process, together with the scoring for each element after the desk top review and after the on site visit.

Surveillance 1 and 2

Section 2 **Surveillance documentation -** this will show the information that the client organisation will need to provide for the annual surveillance visits

Section 3 **Surveillance reports -** this will contain the assessor's report on each surveillance activity

First Desk-top Analysis Date	Date Sent to Client	Date sent to CfA
9 March 2015	9 March 2015	9 March 2015
Second Desk-top Analysis Date	**Date Sent to Client**	**Date sent to CfA**
N/A	N/A	N/A
Assessment Visit Analysis Date	**Date Assessment Analysis sent to CfA**	
11-12 March 2015	17 March 2015	
Date of first surveillance	**Date of second surveillance**	**Date of Recertification**
TBC	TBC	TBC

	Key
CP	Compliance Plus
F	Full Compliance
P	Partial Compliance
NC	Non-compliance
VO	Evidence Verified On-Site
DTR	Desk-top Review
AV	Assessment Visit

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SECTION 1 - ASSESSMENT ANALYSIS

1. CUSTOMER INSIGHT

1.1 Customer Identification					
Element	Desk-top Evidence	Key Questions / person asked?	Visit(s) Day Evidence	DTR Result	Final Result
1.1.1 We have an in-depth understanding of the characteristics of our current and potential customer groups based on recent and reliable information.	Stakeholder analysis chart Employer database Information from SITS and the student profile DLHE cohort data.	How does library and student services segment customers?	Stakeholder analysis charts done for Library and Student services too	P	F
1.1.2 We have developed customer insight about our customer groups to better understand their needs and preferences.	Library satisfaction and estates survey. Local plans for services Online Surveys Feedback postcards and comments box You Said…We Did notice board Reception comments box Feedback from induction for new students Halls Facebook group poll National Student Survey feedback Moving in experience survey Focus group transcript 1-1 appointments and feedback; feedback postcards Survey Monkey and hard copy evaluations			F	F

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1.1.3 We make particular efforts to identify hard to reach and disadvantaged groups and individuals and have developed our services in response to their specific needs.	24/7 library opening hours Appointments Subject help 24/7 website access Contact methods such as telephone, email, drop-in, SLO service, leaflets, TV screens, text reminders; student adviser evening service; bite size study skills sessions; student peer mentoring scheme. English pre-sessional group inductions Drop in sessions at various times Meet and Eat event at Halls A female counsellor is available for appointments on request	Discuss with managers, customers and staff	VO	P	F

1.2 Engagement and consultation

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
1.2.1 We have a strategy for engaging and involving customers using a range of methods appropriate to the needs of identified customer groups.	Feedback and survey processes Website, Moodle Open Days Meet and Eat Social media Employability Strategy Range of communication tools such as email, phone, text, Facebook, Twitter, newsletter, TV screens; feedback postcards; evaluation surveys; consumer			F	F

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	group, Employability Week and Summer School initiatives.				
1.2.2 We have made the consultation of customers integral to continually improving our service and we advise customers of the results and action taken.	You Said We Did Surveys and action plans TV screens Staff Liaison Committees Moodle updates Meetings held with Employability Champions.	Discuss with managers and customers	VO	P	F
1.2.3 We regularly review our strategies and opportunities for consulting and engaging with customers to ensure that the methods used are effective and provide reliable and representative results.	Annual health checks; local questions on surveys about how to engage better with students. Feedback from bite size sessions reviewed annually Feedback from mentoring is reviewed and leads to changes where appropriate; feedback on service surveys; Student representation on committees throughout university. Attendance at external meetings, conferences to gain new insights Team meetings Employability Champions Group Employability Strategy Group Staff planning day	Discuss with managers	VO	P	F

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1.3 Customer satisfaction

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
1.3.1 We use reliable and accurate methods to measure customer satisfaction on a regular basis.	Range of surveys used. Feedback postcards Survey Monkey evaluations National DLHE Survey and NSS Student consumer group Facebook; monthly reports.			F	F
1.3.2 We analyse and publicise satisfaction levels for the full range of customers for all main areas of our service and we have improved services as a result.	Satisfaction survey and results You Said…We Did notice board and web pages; Student centre questionnaire results. Reports to Education Committee and Employability Strategy group	View you said we notice boards	VO	P	F
1.3.3 We include in our measurement of satisfaction specific questions relating to key areas including those on delivery, timeliness, information, access, and the quality of customer service, as well as specific questions, which are informed by customer insight.	BISSTO Survey User Education Survey Induction Survey Satisfaction questionnaires Survey Monkey Questionnaire for 1-1 appointments and group work sessions.	VO - Do all services cover specific questions on delivery, timeliness, information and access as well as the quality of service in their feedback questionnaires	*See assessment report for development point*	P	**P**

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		and processes?			

1.3.4 We set challenging and stretching targets for customer satisfaction and our levels are improving.	Performance standards 10 years+ of benchmarked survey data. Targets within SS local plans	Discuss and view targets for customer satisfaction and performance trends	*See assessment report for development point*	P	**P**
1.3.5 We have made positive changes to services as a result of analysing customer experience, including improved customer journeys.	Improvement to library services including 24 hour opening for library; larger silent study provision and increase of group study space. Student Adviser evening service; assignment box relocated to library; use of social media etc; changes from specific appointments to regular drop in sessions to accommodate all students for immigration support; changes to delivery of induction; reviewing and ultimately changing NMH preferred providers after negative feedback received, Wi-Fi for halls			F	F

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2. THE CULTURE OF THE ORGANISATION

2.1 Leadership, policy and culture					
Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
2.1.1 There is corporate commitment to putting the customer at the heart of service delivery and leaders in our organisation actively support this and advocate for customers.	Mission Statement Strategic Plan 2010-2016 Customer Service Charter Learning Partnership Statement Students involved in ISRs, committees and panels. Careers Statement of Service	Discuss with managers and staff	VO	P	F
2.1.2 We use customer insight to inform policy and strategy and to prioritise service improvement activity.	Steering groups, ISR, sub-groups utilised when drafting policy. Customers consulted via surveys to obtain their views on the service and how it could be improved Staff Suggestion Scheme Careers Service consultation group Student reps on Employability and Enterprise Strategy Group Careers Service On Tour – speaking to students around the campus	Discuss with managers, staff and customers	VO	P	F

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2.1.3 We have policies and procedures, which support the right of all customers to expect excellent levels of service.	Library Rules & Regulations section of Library website. User Entitlement Statement. Student Charter Policies including Customer Service, Equal Opportunities, Mental Health Policy, Disability, Bullying and Harassment, etc. – all on Student Services web pages.			F	F
2.1.4 We ensure that all customers and customer groups are treated fairly and this is confirmed by feedback and the measurement of customer experience.	Surveys and feedback You Said, We Did. Comment postcards. Surveys inviting feedback. Staff testimony Customer focus groups	Discuss with managers, staff and customers	*See assessment report for development point*	P	F
2.1.5 We protect customers' privacy both in face-to-face discussions and in the transfer and storage of customer information.	Enforcement of the data protection act Data protection policy Private interview rooms are used for 1-to-1 or group appointments Computer screens locked when away from desks	View facilities on-site	VO	P	F

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2.1.6 We empower and encourage all employees to actively promote and participate in the customer-focused culture of our organisation.	Open door policy from management to staff CSE accreditation project Staff Suggestion Scheme Staff PDP Customer service training undertaken Customer Service Charter The Student-Led Teaching Awards	Discuss with staff	VO	P	F

2.2 Staff professionalism and attitude

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
2.2.1 We can demonstrate our commitment to developing and delivering customer focused services through our recruitment, training and development policies for staff.	Staff training programme within university. NoWAL and CILIP opportunities Mandatory training for all staff – Bribery, Data Protection, Health and Safety, Professional Communications (re Diversity). PDPs for further development. Customer focused points/requirements listed in the job specs. Different service areas supporting each other with training, e.g., funding providing information to the Student Advisors on the most popular queries they may receive at the desk CSE Champions Training	Discuss with managers and staff	VO	P	F

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2.2.2 Our staff are polite and friendly to customers and have an understanding of customer needs.	Customer feedback and testimony Customer Service charter Student Services staff training manual/handbook, policy examples Staff development handbook Local induction process Positive feedback file in careers CSE training	Discuss with customers	VO	P	F
2.2.3 We prioritise customer focus at all levels of our organisation and evaluate individual and team commitment through the performance management system.	Performance management system University IIP process Customer feedback discussed at team meetings	Discuss with staff	VO	P	F
2.2.4 We can demonstrate how customer-facing staffs' insight and experience is incorporated into internal processes, policy development and service planning.	Minutes from staff meetings Staff suggestion schemes You Said We Did on website Team meeting minutes Staff planning day minutes	Discuss with managers and staff	VO	P	F

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2.2.5 We value the contribution our staff make to delivering customer focused services, and leaders, managers and staff demonstrate these behaviours.	CSE exercise and training Staff suggestion scheme	Discuss with staff		P	F

3. INFORMATION AND ACCESS

3.1 You widely publicise access to your services and their availability					
Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
3.1.1 We make information about the full range of services we provide available to our customers and potential customers, including how and when people can contact us, how our services are run and who is in charge.	Website pages Leaflets Posters Social media, i.e. Facebook, Twitter Information packs Open days Enrolment and Fresher's Week. Statements of Service TV screen information Moodle information			F	F

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3.1.2 Where there is a charge for services, we tell our customers how much they will have to pay.	Price List and overdue charges on web pages A list of charges is stated on the Student Advisors webpage (e.g. Bank letters 1 free and then charge for additional. To Whom It May Concern letters, 3 offered and then a £5 charge). Charges for immigration services are included where appropriate on web pages and leaflets advertising the service. Students attending non core trips are informed of any support they may need to pay for themselves. Invoices showing Halls fee date and payment amounts. The methods of payment are on the back of the invoice. Also bed pack, damage and key charge invoices are produced.			F	F

3.2 Your services meet the needs of customers

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
3.2.1 We provide our customers with the information they need in ways which meet their needs and preferences, using a variety of appropriate channels.	Library web pages, social media, in house written publications. E Guidance Use of Moodle Consultation Group Newsletters	Discuss with customers	VO	P	F

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3.2.2 We take reasonable steps to make sure our customers have received and understood the information we provide.	You Said We Did This Concise information and clear language is used During Induction, it is the UoB's policy to advise students about what they should have received via post/email and checked. This is supported by the induction checklist and personal tutor meetings. Students are also talked through what they need to do. Face to face meetings Student consultation group	Discuss with customers	VO		P	F

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3.2.3 We have improved the range, content and quality of verbal, published and web based information we provide to ensure it is relevant and meets the needs of customers.	Immigration information presented at induction has been improved including use of videos made by international students, arrival guide with concise information about key points and hand-outs with use of images and logos. Information is reviewed in line with external changes e.g. UKVI changes and on an annual basis during the summer. Funding- submitting videos to share on Student Advisors Facebook group about up to date Student Finance issues, e.g. phishing Halls- upload documents e.g. room change request form, to the Facebook group. Annual review of all careers guides Annual review of website Staff quality group to review all incoming information Intern review of website Student consultation group			F	F

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3.2.4 We can demonstrate that information we provide to our customers is accurate and complete, and that when this is not the case we advise customers when they will receive the information they requested.	Standards of services	Discuss with customers		P	F

3.3 Access

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
3.3.1 We make our services easily accessible to all customers through provision of a range of alternative channels.	Contact Us pages on website Appointments, Drop In, Email, Phone, Social media (F/B, Twitter), Evening service as a result of feedback. 24/7 website E guidance Telephone guidance/Text 1-1 appointments Workshops On Tour – about campus	Discuss with customers	VO	P	F

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3.3.2 We evaluate how customers interact with the organisation through access channels and we use this information to identify possible service improvements and offer better choices.	Data of students who visit the SIC and SLOs is gathered. Drop In/Appointment times have been altered as a result of data. Halls receive Google analysis of Student pad, so we can monitor the number of views made to the site Halls help landlords with analysing data linked with the stats from the Bolton Student pad, e.g. how many views their property advert has had compared to other adverts. Staff reviews of workshop attendance Staff review of drop in and appointments Staff review of social media presence/hits/likes etc.	Discuss with managers and staff	VO		P	F
3.3.3 We ensure that where customers can visit our premises in person facilities are as clean and comfortable as possible.	Estates have carried out improvements in 2013. Cleaning is addressed by Facilities on a daily basis. Refurbishment of common room Maintenance requests on the back of a room inspection	View of facilities on site	VO		P	F
3.4 Cooperative working with other providers, partners and communities						

3.4.1 We have made arrangements with other providers and partners to offer and supply co-ordinated services, and these arrangements have demonstrable benefits for our customers.	Access Schemes are listed on web pages Referrals take place between services within Student Services. Liaison between staff occurs to benefit the customer and address their needs, e.g. Funding and Counselling, Disability and SLOs, etc. Halls/Accommodation- links with landlords for advertising private accommodation for students on Bolton Student pad Funding- National Student Money Week where we have different partners partaking. Statement of Service for employers Employer leaflets Annual Careers Fair Employer presentations/campus visits Dedicated employer web pages Offer of placements and internships	Discuss with partners	VO	P	F

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3.4.2 We have developed co-ordinated working arrangements with our partners that ensure customers have clear lines of accountability for quality of service.	Student Staff Liaison Committees attended by subject librarians Referrals take place between services within Student Services. Liaison between staff occurs to benefit the customer and address their needs, e.g. Funding and Counselling, Disability and SLOs, etc. Halls/Accommodation- links with landlords for advertising private accommodation for students on Bolton Student pad Halls – we link with The Student Accommodation Code (SAC), an outside body who students can complaint to about accommodation standards Employer visits Employer industry boards Statement of service for employers	Discuss with Partners	VO	P	F

3.4.3 We interact within wider communities and we can demonstrate the ways in which we support those communities.	Book disposal project this summer meant we gave books to other organisations such as University of Leeds, Bolton Public Library etc. Volunteering Service and links to community groups Volunteering Fair Support community groups via student placements and support through 'live briefs' Involvement with employers, charities, local organisations for Fresher's Week, supporting charities (British Heart Foundation). Halls – Bolton Lads & Girls Club – provide accommodation for 16-19 year olds during the NCS program			F	F

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4 DELIVERY

4.1 Delivery standards					
Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
4.1.1 We have challenging standards for our main services, which take account of our responsibility for delivering national and statutory standards and targets.	Customer Service Charter – Standards for responding to letters, emails, voice mails, etc. Student Entitlement Documents – Explains what the students can expect from the services within the university. Local plans for departments – Outline what services will provide. Disabled Students Allowance national standards set nationally by BIS and Student Finance England when guiding and advising students and implementing support for students. Counselling service adhere to BACP ethical framework to maintain professional standards. Careers Service standards Employability Plan with KPIs	Discuss with managers	VO	P	F

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| 4.1.2 We monitor and meet our standards, key departmental and performance targets, and we tell our customers about our performance. | Internal monitoring of performance and budgets.

Student Services
You Said We Did
Monthly statistics
Team meetings/minutes
Annual DLHE results

Careers
Feedback on performance is obtained by: surveys.
support providers for example Clear-links, Barry Bennetts gather their own data on their performance from students. However careers meet with them and review the service with them at least annually.
Careers Service Annual Report | Discuss and view performance figures on site | *See assessment report for development point* | P | **P** |

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4.1.3 We consult and involve customers, citizens, partners and staff on the setting, reviewing and raising of our local standards.	staff consultation – This has generated a staff suggestion scheme. customer consultation – Students generally consulted via surveys and focus groups management – Informed of service activities by summary reports, weekly figures on enquiries logged, etc. Heads of service regularly meet with the Students Union to review services Halls – accommodation standards. Team meetings Staff planning day Employability and Enterprise Strategy Group Champions Group Student consultation group Education Committee	Discuss with stakeholders on site	*See assessment report for development point*	P	**P**
4.2 Achieved delivery and outcomes					
Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result

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| 4.2.1 We agree with our customers at the outset what they can expect from the service we provide. | Customer Code of Conduct Library Mission Statement. Customer Service Charter Student Entitlement Document Immigration statement of service Disability pack and initial appointment for students who declare a disability to the university. Halls – conduct statement and accommodation contract Funding – bursary information includes timeframe of allocation and appeals process attached to bursaries and scholarships Counselling - In initial appointments students are advised what to expect from counselling, what the nature of their role is and what they can expect them to do. Careers Adviser contracting with client Website information | Discuss with customers | VO | | P | F |

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4.2.2 We can demonstrate that we deliver the service we promised to individual customers and that outcomes are positive for the majority of our customers.	Library Satisfaction Survey Evidenced through surveys Halls-A5 flyer has percentage stats representing student satisfaction survey responses Facebook group poll Feedback from individual students Survey Monkey Feedback card NSS Survey	View information on site and discuss with customers	VO	P	F
4.2.3 We can demonstrate that we benchmark our performance against that of similar or complementary organisations and have used that information to improve our service.	SCONUL Data Attendance at networking meetings with colleagues at other University's e.g. AISA, UKCISA Liaising with other Universities through forums and meetings Benchmarking following National Guidance on good practice and guidelines set by organising relevant bodies such as Student Finance England, DSA-QAG. Careers Adviser Staffing Comparison undertaken against other HEIs – used in management report DLHE comparison and employability league tables	Discuss with managers	*See assessment report for development point*	P	F

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4.2.4 We have developed and learned from best practice identified within and outside our organisation, and we publish our examples externally where appropriate.	Papers on BISSTO which have been presented internally and externally. Staff development sessions are organised to gain insight into what other departments are doing. Also shared within the sector at networking events. Inclusive learning and disability was the major theme of last years Teaching and Learning conference, bringing in an external speaker from Sheffield Hallam to lead the conference. External conferences Give presentations to partner organisations Case studies CSE Blog/website External visits	Discuss with managers and staff	VO		P	F

4.3 Deal effectively with problems

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result

| 4.3.1
We identify any dips in performance against our standards and explain these to customers, together with action we are taking to put things right and prevent further recurrence. | Complaint about opening hours over summer, summer loans and subsequent recall system
Cover for staff at peak times – At the beginning of the year, staff assist (act as queue busters) to avoid students queuing for simple requests.
Halls- Wi-Fi___33 routers delivery delay for The Hollins residents when Orlando residents had already received them. We kept them up to date with information and informed them on an estimate arrival.
HF- monitoring of time take to assess/decide applications seen regularly
Funding- email sent regarding delay in bursary payments
Discussed internally at careers team meetings and staff planning day
You Said We Did | Discuss on site whether information about dips in performance standards and complaints is published | *See assessment report for development point* | P | **P** |
| 4.3.2
We have an easy to use complaints procedure, which includes a commitment to deal with problems fully and solve them wherever possible within a reasonable time limit. | Website
Details of the updated complaints procedures are on the Student Portal and this is accessible for students.
Halls- complaints procedure in place and stated in the Living In Harmony booklet.
Funding- bursary and scholarship appeals process
Hardship Fund- appeals process
General University Complaints Procedure | Discuss with customers | VO | P | F |

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4.3.3 We give staff training and guidance to handle complaints and to investigate them objectively, and we can demonstrate that we empower staff to put things right.	Staff training on dealing with difficult situations and on the complaints process	Discuss with managers and staff	VO	P	F
4.3.4 We learn from any mistakes we make by identifying patterns in formal and informal complaints and comments from customers and use this information to improve services and publicise action taken.	Complaints data You Said We Did *Standards and Enhancements Office identify, review and ensure satisfaction of complaints.* DBS – a complaint has lead to changes to the administration process of the DBS assessing, i.e. a DBS pack is sent back to a student if it is found incomplete. For counselling all informal and formal stage 1 complaints are dealt with in the first instance by the service manager then any patterns can be identified. Similarly all stage 2 complaints and above are dealt with centrally so any patterns can easily be identified	Discuss with managers and staff	VO	P	F

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4.3.5 We regularly review and improve our complaints procedure, taking account of the views of customers, complainants and staff.	This is carried out centrally and reviewed in line with other central policies.	Discuss with managers	VO	P	F
4.3.6 We ensure that the outcome of the complaint process for customers (whose complaint is upheld) is satisfactory for them.	We investigate all complaints thoroughly to ensure any errors made are identified so that the student can be satisfied that this has been thoroughly investigated. As well as the service learning from any errors made in order to learn from them. Also the investigation is carried out by an independent person as much as possible. Standards and Enhancements Office would identify, review and ensure satisfaction of complaints.	Discuss with staff and customers	VO	P	F

5. TIMELINESS AND QUALITY OF SERVICE

5.1 Standards for Timeliness and Quality

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result
5.1.1 We set appropriate and measurable standards for the timeliness of response for all forms of customer contact including phone calls, letters, e-communications and personal callers.	Customer Services Charter Careers Service Statement of Service	View service statements and charters for all services on site	VO	P	F
5.1.2 We set comprehensive standards for all aspects of the quality of customer service to be expected in all dealings with our organisation.	Statement of service Customer service charter Confidentiality statement for immigration and Welfare service Careers Service standards in place Employability KPIs via strategy	View service statements and charters for all services on site	VO	P	F

5.2 Timely Outcomes

Element	Desk-top Evidence	Key Questions / person asked?	Visit Day(s) Evidence	DTR Result	A Visit Result

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5.2.1 We advise our customers and potential customers about our promises on timeliness and quality of customer service.	Customer Services Charter Website Application pack explains the timeframe of an assessment, plus there is the ongoing process of emails Statement of service and confidentiality statement is available on the Immigration and Welfare website.	Discuss with customers	VO	P	F
5.2.2 We identify individual customer needs at the first point of contact with us and ensure that an appropriate person who can address the reason for contact deals with the customer.	Email evidence available SITS evidence logged to show interaction with SLOs. Training of interview techniques, how to deal with specific queries, etc., is completed on the job. Immigration - Reason for contact is established quickly with correct questioning and students are referred to appropriate departments for assistance – e.g. admissions, academic support. Staff have a thorough understanding of the various departments and support available within the University. Staff statistics from SITS	Discuss with customers	VO	P	F

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5.2.3 We promptly share customer information with colleagues and partners within our organisation whenever appropriate and can demonstrate how this has reduced unnecessary contact for customers.	Liaison takes place with areas such as the disability service. Other examples include referrals to other support services and the Bite Size Sessions demonstrate working with Staff development sessions help to inform colleagues across various departments. (Basic information from hand-outs can often help to answer a query). We liaise with staff on behalf of the student when we are aware that the student requires several services, e.g. student funding information and disability service guidance. Confidentiality statement is in place and followed with regard to student contact. Where permission is provided information is shared between internal and external departments, in particular UK Visas and Immigration and admissions to ensure the best service is provided to the customer. Halls-when a student cannot pay Halls fee on time and it is due to a student finance delay in their application, we have provided information about the Funding team and referred them to drop-in sessions. This has saved the student having to contact Funding for this information. Sharing student CVs for placement opportunities			F	F

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| 5.2.4
Where service is not completed at the first point of contact we discuss with the customer the next steps and indicate the likely overall time to achieve outcomes. | Emails sent when ILL's have been delayed
In cases where students are submitting applications or documents, e.g. Hardship fund, DBS, mitigating circumstances, appeals, etc., further information about the next step is given with reference to guidelines from the main documents/procedures.
Customers are kept up to date with the progress of case work and email/telephone and face to face updates are provided with timescales.
In any situation where we as a service need to carry out steps to ensure the customers outcomes are met, we notify the student what we will do next, and advise we will update them as soon as we have either progressed or completed an achievement of the initial outcomes.
Careers Adviser contracting
Client action plan
Follow up appointments | Discuss with customers | VO | P | F |

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5.2.5 We respond to initial enquiries promptly, if there is a delay we advise the customer and take action to rectify the problem.	At peak times, staff have helped out in the Student Centre to assist students and to try and deal with simple queries. Students warned about additional time required for processing letters at the start of the academic year. (Website and FAQs makes reference to this). Initial enquiries are prioritised in accordance with targets on student interaction (1 – 2 working day turnover), if a delay is experienced (i.e. wish to speak to SFE but they have closed at 4:30pm) we then advise the student on the delay on what action we are taking to rectify this (will call them the following day at the earliest convenience) We prioritise in areas were a delay has occurred/is forthcoming. For instance is there is a waiting list to loan equipment, we will spend more time calling in overdue equipment to ensure students are provided equipment loans at the earliest convenience. Use of social media to communicate	Discuss with customers	VO	P	F

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5.3 Achieved Timely Delivery					
5.3.1 We monitor our performance against standards for timeliness and quality of customer service and we take action if problems are identified.	Departmental Performance standards We follow the Student Services Customer Services Charter, ensuring we fulfil all points on the charter at all times. If we ever fail to satisfy these aspects of the charter we will ensure an appropriate response to maintain high levels of customer service.	View performance data on site	*See assessment report for development point*	P	**P**
5.3.2 We are meeting our current standards for timeliness and quality of customer service and we publicise our performance against these standards.	Departmental Performance standards Customer feedback surveys	View performance data on site and how publicised	*See assessment report for development point*	P	**P**

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5.3.3 Our performance in relation to timeliness and quality of service compares well with that of similar organisations.	Immigration - Compared to SFE processing time we action student emails within 1 -2 working days (compared to SFE who take within 5 working days) Disability - • Assessment of Needs reports are processed within 10 working days We process corresponding approval of recommendation letters within 10 days. Counselling - • Compared to NHS partners processing time we action student emails within 1 -2 working days compared to NHS who take up to 5 working days. Support evidence reports are processed within 3 working days, NHS MHT targets 15 working days.	See evidence of benchmarking on site	*See assessment report for development point*	P	**P**

Compliance plus Justification:

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SECTION 2 – FIRST SURVEILLANCE DOCUMENTATION

Assessment Reference Number:		
Name of Assessor:	Date of First Surveillances Visit:	Number of Days required:

Surveillance category after initial assessment (High or Low):	Surveillance category after first surveillance (High or Low):

Note for the client:

In order to maintain your accreditation under Customer Service Excellence your assessor needs to make surveillance visit one year after you are first accredited. Your surveillance visit will take place in (INSERT DATE) . The main focus for the surveillance will be to look at what progress has been made against any development points raised in the initial report and any changes that have occurred since your first assessment. If your surveillance category is High after your first surveillance visit an on- site visit will be required for your second surveillance, this will be discussed with you by your assessor at the end of your first Surveillance.

Centre for Assessment will contact you in (INSERT DATE) and request the following documents:

Item	Assessor to Confirm Receipt
▪ Latest performance data for your core business - this needs to show how well you have performed against the standards you have set	
▪ Details of any review of your service delivery or service standards since your first assessment	
▪ Latest customer satisfaction results	
▪ Latest complaints report	
▪ Latest Annual Report	
▪ Details of any changes made since your last assessment	

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You will also be asked to provide responses to the following development points raised after your first assessment:

Development Points:

On-site visit: Clients undergoing their first surveillance against Customer Service Excellence and all high risk surveillance category clients will have an on-site visit from their Assessor. This visit must take place 12 months after your initial assessment.

The following activities have been identified for this on-site visit:

Activities		
Onsite plan		
Date/Time	**Key people to be seen**	**Key issues to be explored**

SECTION 3 – FIRST SURVEILLANCE REPORTS (to be completed by the assessor after each surveillance)

FIRST SURVEILLANCE

What has changed since the first assessment in relation to each of the 5 criteria? (Assessor to insert details under each criterion)

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Criterion 1   Customer Insight

Criterion 2   Culture of the Organisation

Criterion 3   Information and access

Criterion 4   Delivery

Criterion 5   Timeliness and quality of service

What progress has the client made against the development points raised in the first report? (Assessor to list development points and updates)

Has the scoring against any elements changed since the first assessment? (Assessor to list changes)

Scoring

- To achieve the Standard an organisation may not have any non-compliances
- To achieve the Standard organisations must demonstrate compliance with each of the criteria. To do so the organisation must achieve full compliance or Compliance plus in at least 80% of the elements contained in each of the criteria

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- The maximum number of partial compliances allowed within each criterion is shown in the table below

Criterion	Number of Elements	Maximum number of partial compliances	Actual number of Partial compliances	Actual number of compliance plus elements
1	11	2	0	0
2	11	2	0	0
3	12	2	0	0
4	13	3	0	0
5	10	2	0	0

SECTION 2 – SECOND SURVEILLANCE DOCUMENTATION (to be completed by the assessor after the first surveillance)

Assessment Reference Number	

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Name of Assessor	Date of Recertification	Number of Days required

Surveillance category after first surveillance (High or Low):	Surveillance category after second surveillance (High or Low):

Note for the client:

In order to maintain your accreditation under Customer Service Excellence your assessor needs to complete a surveillance activity one year after you are previous surveillance activity. Your surveillance activity will take place in (INSERT MONTH AND YEAR). The main focus for the surveillance will be to look at what progress has been made against any development points raised in the previous surveillance activity and any changes that have occurred since your last surveillance. If your surveillance category is High after your first surveillance visit an on- site visit will be required for your second surveillance, this will be discussed with you by your assessor at the end of your first Surveillance visit.

 Centre for Assessment will contact you in (INSERT MONTH AND YEAR 2 MONTHS BEFORE SURVEILLANCE IS DUE) and request the following documents:

Item	Assessor to Confirm Receipt
▪ Latest performance data for your core business - this needs to show how well you have performed against the standards you have set	
▪ Details of any review of your service delivery or service standards since your first assessment	
▪ Latest customer satisfaction results	
▪ Latest complaints report	
▪ Latest Annual Report	
▪ Details of any changes made since your last assessment	

You will also be asked to provide responses to the following development points raised after your Surveillance: (ASSESSOR TO ENTER DETAILS OF DEVELOPMENT POINTS - MOST WILL RELATE TO PARTIAL COMPLIANCES)

Development Points:

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Off-site assessment:
Clients undergoing their second surveillance against the Customer Service Excellence that fall into the LOW risk category.

On-site assessment:
Clients undergoing their second surveillance against the Customer Service Excellence that fall into the HIGH risk category.

The following activities have been identified for the *off-site/ *on-site assessment
An Outline plan must be completed after SV1 visit for SV2 for either off-site or On-site assessment and detail added 2 weeks before SV2 takes place.

Activities		
Generic		**Use of certification mark**
		Check key service and customer care information is available for customers
		Observe the service in action
		Talk to customers, staff and partners to obtain views on the service
Onsite plan		
Date/Time	**Key people to be seen**	**Key issues to be explored**

SECTION 3 – SECOND SURVEILLANCE REPORT (to be completed by the assessor after each surveillance)

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SECOND SURVEILLANCE

What has changed since the first assessment in relation to each of the 5 criteria? (Assessor to insert details under each criterion)

Criterion 1   Customer Insight

Criterion 2   Culture of the Organisation

Criterion 3   Information and access

Criterion 4   Delivery

Criterion 5   Timeliness and quality of service

What progress has the client made against the development points raised at last surveillance?
(Assessor to list development points and updates)

Has the scoring against any elements changed since the first assessment? (Assessor to list changes)

Scoring

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- To achieve Customer Service Excellence an organisation may not have any non-compliances
- To achieve Customer Service Excellence organisations must demonstrate compliance with each of the criteria. To do so the organisation must achieve full compliance or Compliance plus in at least 80% of the elements contained in each of the criteria
- The maximum number of partial compliances allowed within each criterion is shown in the table below

Criterion	Number of Elements	Maximum number of partial compliances	Actual number of Partial compliances	Actual number of major non-compliances
1	11	2	0	0
2	11	2	0	0
3	12	2	0	0
4	13	3	0	0
5	10	2	0	0

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