



## HIA Quality Mark

### Submission by the HIA's Strategic Manager ahead of Validation Visit for Approved Status Accreditation

#### **Notes on completing this submission**

Please return this submission to Foundations at least seven days before your validation visit

Completion of this submission template is required to enable us to assess the sustainability of your services and the opportunities open to them to develop and grow.

The five areas we would like you to focus on for us are:

- 1. Access to your own and other's services**
- 2. Smart working and supporting your staff**
- 3. Evidencing service outcomes**
- 4. Service Targets and Sustainability**
- 5. Effective management of information**

During the validation visit we will

1. Use the information you give us to discuss how your service operates and to give you the opportunity to add any further information which you feel would be useful in assessing your services. We would also welcome any feedback you are able to give us about your experience undergoing this validation process.
2. Interview your staff (grouped by their job types), to establish their knowledge of your service standards and procedures
3. Interview your commissioners, to help us understand their service requirements and how well you are meeting their expectations

**1. Access to your own and other's services**

*Please tell us how easy it is for your customers to both know about your services and to access them.*

1. Give examples of how you promote your services locally

2. Do you have your own website, what is its address, the type of information it gives and can people refer via your website?

3. Working with third parties, let us know what organisations you forward people to and who refers people to your services, (give us some idea of volumes each way)

4. How do you know your service offer and standards are clear and easily understood by your customers?

5. For first time callers do you have clear and consistent assessment and prioritisation processes in place?

6. Do you log the nature of enquiries and where you signpost people on to?

7. Do you have an approved contractors list which you make available to callers and how do you police this list?

8. For the last year tell us the number and % of customers who:

- Only were an enquiry only and received no other direct service from you
- Only used the "core" service
- Only used the handyperson service
- Used both the core and handyperson service

9. For the last year tell us the number and % of customers who had used the service (i.e. not just an enquiry)

- For the first time and,
- Those who had used the service previously (i.e. returning customers)

10. Do you promote your services to “self funders”, if so how and what % of your work is delivered to self funders?

11. Tell us of any other ways you seek to make your service visible and easy to use?

## **2. Smart working and supporting staff**

*During our interviews with your staff we will look for evidence of how they are expected to do their jobs and how they ensure, as far as possible, that the customer remains in control of the service they are receiving from you.*

1. How do you build on your staffs existing skills to improve their competency, (e.g. formal or informal mentoring and support arrangements, specialist training etc.)

2. How do you support your staff look to give real choices to the customers they visit? (e.g. do they have enough time to look at all relevant circumstances, discussing all choices open to clients before agreeing on next steps, putting in place a proper support plan and being clear to customers about the likely costs and time scales of any works planned.

3. What aids do your staff have to help them do their jobs more effectively (e.g., use of PDAs, specialist software for drawings or charitable funding searches, vehicle trackers, accounting for payments in cash, stock control and purchasing, software ability of all staff to input customer service data, etc).

4. Examples of innovations/ changes you have introduced recently to your services due to input from staff.

## **3. Evidencing service outcomes**

*Can you demonstrate direct links between your assessment of customer need, the support plan in place, measurement of the*

*outcomes for the client arising out of the support you provide and the reporting you make to your commissioners / management body?*

These outcomes include

- Helping older and disabled people maintain and improve emotional and physical wellbeing through independent living
- Enable older and disabled people to exercise choice and control over their home environment
- Help reduce crimes against property and the fear of crime/anti-social behaviour
- Increase economic wellbeing by encouraging investment in people's own homes and maximising household income
- Helping to maintain dignity and respect
- Help reduce or delay reliance on residential or hospital care
- Help reduce accidents and preventable admissions to hospital

Please tell us:

1. Do you record your service outcomes using the above list of outcomes? (if not say how you record your service Outcomes)

2. Do you report to commissioners/management board using the above list of outcomes? (if not say how you report your service outcomes/outputs and attach a typical recent report on your services activity)

#### **4. Service Targets and Sustainability**

*We want to know how well you are delivering on your commissioners expectations of your services. We also want to know how you are developing new markets for your services with a view to making them more sustainable.*

Please tell us:

1. Do you have a service contract in place with your commissioner(s)?

2. When did the contract(s) start and when are they due to expire?

3. List here (or attach) the major service targets these contracts are requiring from your service?

4. What is the frequency your commissioners require you to report to them?

5. Are you currently able to meet the set targets? (If not explain why not and if you are able to renegotiate these targets).

6. Please give us examples of any added value/extra income you currently are able to bring to your existing contract(s)

7. Do you have a business or service development plan in place? (if so, what period does it cover)

8. Tell us the areas you are looking at to attract additional sources of revenue for your services and to find new sources of capital funding for works required by your clients.

9. What are the main risks to the sustainability of your services and what steps are you taking to mitigate these?

**Your response to Q's 8 and 9 may include some or all of these points:**

- An Executive Summary of your business plan that can demonstrate the fit between the business plan and your organisation's mission.
- An Analysis of the local business environment and market opportunities
- An analysis of your local competition, (e.g. third sector services, private sector, public sector and direct competitors with some indication on actual or potential market share)
- Milestones for action/change
- Attitude to diversifying risk
- How you balance your focus between existing core HIA services and new ideas – stepping out into new areas.
- Possible reconfiguration of staff roles/ office locations/flexible working/outsourcing
- Local diversity mapping
- Analysis of customer feedback and market research
- Specialist services for complex needs/ hard to engage groups
- Particular identified priorities of the HIA's main contract holders
- Analysis of the current baseline in relation to service uptake and promotion

- The identified needs of other community stakeholders (existing and new) including professionals in the health services

### **5. Effective management of information**

*A good customer information system is essential for both customer care and reporting purposes. Can you demonstrate that you have a data-capture and reporting facility that is fit for purpose and that requires little or no administrative duplication which also aligns your workflow recording with your reporting requirements?*

1. Do you use a specialised customer information software package? (if so what is it called)

2. Is it for your service alone or is it shared with other service streams in the organisation

3. Does it produce correspondence for various stages of work to customers and others

4. Does it allow all customer information (including drawings/plans) to be inputted?

5. Does your system capture both service outputs and outcomes?

6. Does it link in with other systems you use

- Devices such as PDA's used by field staff
- Enable staff to access data remotely (e.g. from home)
- Outside your organisation (e.g. with partner organisations you work with)

7. Does your system capture added value for customers (such as increased benefit take up), please state which areas of added value you look to evidence

8. Please mention any other features it has which help your service to function well

Document last reviewed July 2015

Owner Roy McNally (OST)

To be reviewed by July 2016