



# Customer Service Excellence

## Assessment Report

Name of Organisation
STOCKTON-ON-TEES BOROUGH COUNCIL



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*Customer Service Excellence* is a national quality mark that seeks to reward organisations that have a truly customer-focused commitment to all they do while providing a positive steer for customer-centred change. Certification to the *Customer Service Excellence* Standard is through a rigorous assessment process including a review of documents submitted to the assessor to demonstrate compliance against each element of the Standard and an on-site visit, all to establish whether or not an organisation meets the requirements of CSE.

This Assessment Report covers the whole of your organisation's journey from initial assessment, through 12 and 24-month review visits. It is designed to add value to the work of your organisation and should be used in conjunction with the Assessment Record which gives further details about compliance against *Customer Service Excellence* and charts the dates on which various stages of the assessment process have taken place.

Centre for Assessment hopes that you find these documents useful. Should you have any enquiries then please contact your assessment project co-ordinator or the *Customer Service Excellence* Manager.

### **Number of days**

Initial assessment: 13 days

12-month review: 3 days

24-month review: 3 days

## Section A: Scoring Achievement by Criterion

### Initial Assessment

	1 – Customer insight	2- Culture of the organisation	3 – Information and Access	4- Delivery	5- Timeliness & Quality of Service
Non-Compliance	0	0	0	0	0
Partial Compliance	0	0	0	0	0
Full Compliance	7	6	8	13	10
Compliance Plus	4	5	4	0	0

### 12-month Review

	1 – Customer insight	2- Culture of the organisation	3 – Information and Access	4- Delivery	5- Timeliness & Quality of Service
Non-Compliance	0	0	0	0	0
Partial Compliance	0	0	0	0	0
Full Compliance	6	5	7	13	9
Compliance Plus	5	6	5	0	1

### 24-month Review

	1 – Customer insight	2- Culture of the organisation	3 – Information and Access	4- Delivery	5- Timeliness & Quality of Service
Non-Compliance					
Partial Compliance					
Full Compliance					
Compliance Plus					

## Section B: Initial Assessment Report

<b>Assessor name</b>	<b>Andrew Mackey/Hugh Keachie</b>	<b>Date of report</b>	<b>17.07.19</b>
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### **Context**

The organisation has been accredited with CSE since 2010. The initial accreditation was achieved following a 'building block' approach including all areas of the Council. The accreditation is now a corporate one covering all aspects of the Council's service delivery. The Council has over 3000 employees operating from 25 sites across the Borough. A key change this year is the retirement of the MD whose replacement took up post in May 2019.

The Borough is located in the Tees Valley and encompasses a wide variety of distinctive communities, including areas of severe deprivation as well as areas of high relative wealth. This gives a range of challenges for the Council to ensure that appropriate services are provided and are accessible to all sectors of the community.

### **Summary**

The Council has always done well in identifying and meeting the needs of its customers. This has been confirmed in previous assessments, with additional 'compliance plus' scores being achieved in each round of assessment. From a start of 2 compliance plus they have progressed to achieving 13 in this assessment. This is especially impressive set against the background of significant change and reducing resources. The Chief Executive left during the course of the past year and has been replaced by a Managing Director, who was previously Deputy Chief Executive. Despite the challenges and changes, the commitment to developing and delivering customer-focused services continues.

### **Key Strengths**

The key areas of strength across the organisation

- Promoting and ensuring equality in access and provision of services (eg the project to increase digital inclusion)
- Effective use of the data that is collected about customers; many examples were provided to show how the data has a clear impact on the development of services
- The commitment to identifying and meeting the needs of groups who are hard to reach
- The degree of flexibility and variety in the methods used to engage and consult with customers
- The corporate commitment to the customer is clear and effectively communicated; this is clear from talking to staff at all levels and in all areas of the Council
- Staff are motivated and excited to deliver the highest quality services for their customers

### **Areas for Development**

The following areas for development were identified and will be looked at when we do the annual review in 2020.

- Some staff feel that the digital offer 'has room for improvement'. This is being addressed in a number of projects and it will be important to review progress at the annual review
- Evidence from staff shows that they often go beyond simply answering a customer's question. Consider whether it would add value to develop an explicit awareness in all staff of the difference between 'answering a question' and 'solving the problem'.
- Review the impact of complaints training given to staff in May 2019. How has this made a difference? Also, has the new complaints procedure made any difference?

- Review progress on the 'Customer centric services' project
- Think about different ways to get customer feedback, avoiding the over-use of surveys
- Review progress on SWIS project – in particular, the decisions re buildings use, the impact of the customer voice and the impact of rolling out Office 365
- Review progress on the 'Family group conference' service
- Consider any other areas where further compliance plus scores might be achieved at the annual review, particularly in criteria 4 and 5

<b>Provisional date for 12-month review visit</b>	<b>6<sup>th</sup> to 8<sup>th</sup> July 2020</b>
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## Criterion 1 – CUSTOMER INSIGHT

### Summary

The Council has a good and current understanding of who its customers are, what they need and how this changes over time. For example, they know that there has been a 12% increase in the demand for adult care services since 2015; almost 60% of residents are over 75 and there have been 5,500 homeless presentations in 2018/19. Ward profiles are used to good effect to understand how the demographics (and therefore the needs) differ from ward to ward – some are extremely deprived, while others are rural and affluent. Data is used to encourage staff to consider life events for customers and how these events might influence on what the Council needs to provide. Particular efforts are made to connect with those who might otherwise be considered hard to reach. The council works with a range of agencies (eg to develop relaxed opening times to cater for customers with autism, or to increase staff awareness of mental health issues). Where possible, additional funds are accessed to help (eg with rough sleepers). Work with a local prison helps arrange accommodation and support in advance of prisoners being released. A great deal of work is done to ensure that customers are engaged and consulted effectively. There are several strategic approaches to make sure that all customer groups are included. Particular success has been achieved in engaging with young people, and work in this area has led to success in local and national awards. A ‘you said, we did’ approach helps make sure that customers get to know the results of consultation and, more importantly, what is done as a result of the consultations. There are very clear targets set for levels of customer satisfaction and these are documented in service and business plans. A real area of strength for the council is evidencing the impacts of analysing customer experience and the service changes that are made as a result. These include both significant service changes (eg the development of Homelessness Reduction Strategy), changes in process (eg improved Blue Badge scheme, streamlined applications for housing) and more minor, but important, changes (eg easily read staff ID, repositioning reception desks).

### Partial Compliance Elements

Element	Justification
NA	

### Compliance Plus Elements

Element	Justification
1.1.1	Detailed analysis of demographics to establish trends and changes and use of this data to inform service developments
1.1.3	Range and depth of evidence on measures taken to reach hard to reach – eg work at PPM to work with volunteers of all ages and backgrounds, effective work to engage with young people, work on ‘Brighter Minds, Better Futures’
1.2.1	Wide range of effective strategies for communicating and consulting with people. Impact of Digital Customer Officer role evidenced – engages with people who otherwise might be missed. Homelessness reduction strategy
1.3.5	Clarity of links between customer insight and improvements to services – eg development of printed handout map at the museum, easy read staff ID, reposition of reception desk, better blue badge process, improved member development programme, more streamlines application process for housing

## Criterion 2 – THE CULTURE OF THE ORGANISATION

### Summary

The organisation has a very clear commitment to developing and delivering services that are focussed on the needs and expectations of customers. Several staff commented, in various ways, that there is a reluctance to say 'no' to customers and to recognise that *'there is always something we can do'*. The changes in the leadership of the Council are seen as being positive and staff expect that the focus on customers will continue under the direction of the new Managing Director. Several examples were provided to show how the processes and structures have been changed to address perceived issues for customers – for example changes to the way that complaints in adult services are handled; this included providing training for staff who had not handled complaints previously. Across several service areas there was evidence that the team focus on the feedback from customers and that they are keen to learn from mistakes. Staff are actively empowered to deliver on customer needs. This is reinforced through processes such as the Customer Service Awards, training and development for staff, website blogs and the staff induction process. Specific projects such as Shaping a Brighter Future and Smarter Working in Stockton actively involve staff in the early and development stages. The importance of customer service is evident in training, recruitment and performance management processes. Recruitment interview questions are focussed on making sure that candidates can demonstrate their passion for service delivery and for understanding the needs and expectations of all customers. The induction programme for new staff is led by the MD and is used effectively as a forum for starting the process of embedding the customer service ethic. Staff are valued in a number of ways and all staff who were asked felt that their contribution is certainly recognised and valued. Examples of how this happens in practice included mentions in the weekly newsletter, operation of the talent network, internal staff awards scheme, access to coaching and mentoring, wellbeing at work projects and the sharing of customer compliments with staff.

### Partial Compliance Elements

Element	Justification
NA	

### Compliance Plus Elements

Element	Justification
2.1.1	Culture Statement, annual staff Customer Service awards, commitment to help armed forces community, Council Plan, Smarter Working in Stockton – clear focus on customers, ongoing training in customer care for staff, MD fronts induction course for new staff to drive home the message
2.1.3	Structured approach to developing and reviewing policies and processes. Many focus on identifying and meeting customer needs – eg Back on Track process, DHP. Independent safety advisory group for events. Customer centric service design project
2.1.6	Range of initiatives to encourage engagement (eg Shaping Brighter Future, 'We are heard' approach
2.2.1	Wide range of training and development for staff to help them deal more effectively with customers – eg gambling awareness, use of secondments, apprenticeships. Structured competency frameworks, recruitment questions
2.2.4	Structured and effective approach to staff engagement – eg service groups established, staff engaged in developing new approaches, training and mentoring roles created

### Criterion 3 – INFORMATION AND ACCESS

#### Summary

As might be expected, the Council has a wide range of options for customers to access information they need. This is done through online services, public health and awareness campaigns, help points and customer service centres. They also work with community organisations to provide information for local communities, as well as promoting information sources through work with local services and businesses. Increasingly, social media, including Facebook, Twitter, is used to communicate with customers and to provide information; this includes work with bloggers where appropriate. Internally there is a well-used Intranet which provides information for staff and for members. Where necessary and appropriate, staff will use text messages to communicate with customers. Understanding is checked through customer feedback and through analysing customer behaviours. Customer use of different channels is analysed to check which channels are more popular and appropriate changes are made as a result of this analysis – for example changes to opening time and informing future marketing events and activities. Partnership working is well-developed and effective, with the Council working with a wide range of agencies to deliver the best service to all customers. Examples of partnerships evidenced include work with the Surveillance Centre, the Police, work with other Local Authorities, Fire Brigade, Home Office and Immigration Enforcement, accommodation providers and DWP. Support for local communities is high and effective. Examples of how this happens in practice include a corporate volunteer scheme, funding for local events, encouragement of effective licensing and work with local communities (eg at the museum).

#### Partial Compliance Elements

Element	Justification
NA	

#### Compliance Plus Elements

Element	Justification
3.2.1	Use of infographics where appropriate. Regular review and amendment to information provided for customers. Training for staff to make sure they have access to all the information they need to help customers
3.4.1	Examples of partnerships including Surveillance Centre, Police, work with other Local Authorities, Fire Brigade, Home Office and Immigration Enforcement, accommodation providers, DWP
3.4.2	Clear agreements and lines of accountability – eg with local nurseries, police and fire services, housing providers
3.4.3	Work with businesses, work with local community groups (eg 'A taste of Africa), corporate volunteering with local businesses, funding for local events, supporting business via effective licensing, 'Setting the Bar' – encourages operators to see the benefits of going beyond the minimum licensing requirements



## Criterion 4 – DELIVERY

### Summary

All service areas were able to show evidence of appropriate and comprehensive service standards. These clearly take account of appropriate national standards and requirements. The service standards are clearly documented in service plans and business improvement plans. The overall standards for the Council are shown in the Council Plan. Performance against the standards is monitored and reported regularly in a range of monthly, quarterly and annual reports. It is reported (eg in the annual Leader’s statement and in displays in the Customer Service Centre). Where appropriate, customers are consulted and engaged in developing and reviewing service standards – for example, the feedback from consultation with young people impacted on the development of standards for SIRF (Stockton International River Festival). Confirmation from external agencies (eg OFSTED) confirm that standards are set, monitored and reported on effectively. Benchmarking is used wherever possible to compare performance with that of similar organisations and to learn from best practice – for example, the Council is part of the Tees Valley Museum Group, Youth Offending Team benchmarking exercise. Internally, best practice is shared effectively via the Intranet, best practice guides, toolkits and the development of digital skills for all staff. Dips in performance are identified and reported via weekly, quarterly and year end reports, and examples were provided to show how such dips are addressed – for example, changes to FAQs, improving links on the website, the introduction of dedicated phone lines for queries around billing time. The corporate complaints process has recently been reviewed and amended and staff have been provided with update training on how to deal effectively with complaints and unhappy customers. Where possible, learning is derived from negative feedback from customers – for example, improved timescales, changes to how data subject access requests and streamlining the processes in revenues and benefits.

### Partial Compliance Elements

Element	Justification
NA	

### Compliance Plus Elements

Element	Justification
NA	

## Criterion 5 – TIMELINESS AND QUALITY OF SERVICE

### Summary

The service standards evidenced include standards covering timeliness and quality. Again, the standards are documented appropriately and performance is monitored and reported. Effective delivery against the standards is further confirmed in evaluation data and in the reports from external inspections. These include evidence from OFSTED, the evaluation of SIRE, audit report for Blue Badge and Concessionary fares processes and performance. In some areas, there are dedicated points of contact to make sure that customer needs are identified as quickly and as efficiently as possible. The use of Q-Matic helps provide a structured and effective way to manage demand and to manage customer expectations. If customers need to be referred on to other services or providers this is done carefully and customers receive an explanation of what is happening and why. Customers confirm that they are dealt with in a timely manner and that explanations are provided when necessary. The Council compares its own performance with others where possible and can demonstrate how its performance compares well – for example, OFSTED reports allow comparisons with other providers. Comparisons (eg on collection rates and speed of processing) with other local authorities again show that Stockton performs well in most areas.

### Partial Compliance Elements

Element	Justification
NA	

### Compliance Plus Elements

Element	Justification
NA	

## Section C: 12-month Review Report

<b>Assessor name</b>	<b>Andrew Mackey</b>	<b>Date of report</b>	<b>17<sup>th</sup> July 2020</b>
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### **Changes in relation to the five criteria and areas for development**

The review was carried out remotely due to the restrictions currently in place around Coronavirus. Over recent months the Council has had to deal with the impacts – both real and potential – of the pandemic and have been able to transform the way it works with its residents, both quickly and effectively. There were many examples provided to show how this has impacted – both on the Council’s understanding of what its customers need just now and on the way that its services are being delivered. Several things shone out from the meeting with staff that the Council should be really proud of:

- The continued passion and dedication of staff. Many examples were provided to show how staff are continuing to go above and beyond for customers; teamwork across the organisation has developed even further during the current crisis and staff seem hopeful that this will continue going forward
- The offer to customers has developed over recent months and become ever more personalised and holistic; there is a real sense that staff see the customer at the end of every interaction and this focus helps them think widely of the customers’ needs and to find ways to meet these
- Partnerships with other organisations have also developed in order to meet the challenges of Covid. Many commercial organisations would be envious of the agility and effectiveness that has been demonstrated and the way that partnership working has enabled complex delivery and logistical issues to be handled very effectively

The following points summarise the key changes and developments that have been noted under each of the 5 criteria:

### **Criterion 1 – Customer Insight**

- Several consultation exercises – eg re the use of the online account for residents
- Experian profiling has been updated
- Internet access and usage patterns have been reviewed and a report developed
- Ward profiles have been updated, giving a better picture of the make-up of each area
- Research has been completed looking at the key barriers to digital inclusion, and the report includes an action plan to address the issues identified
- A digital services group has been established to identify issues and strategies to increase awareness and usage of the digital offer
- A lot of work has been done to identify and support vulnerable people through the Covid-19 crisis
- There has been increased efforts to engage with disadvantaged groups – there have been 4500 enrolments on skills courses with 64% coming from disadvantaged backgrounds

### **Criterion 2 – Culture of the Organisation**

- The categories for the internal CSE awards have been revised to include ‘caring colleague’ and ‘outstanding contribution’ awards specifically related to Covid
- Several case studies were provided to demonstrate going the extra mile for residents during the lockdown period. Many include providing services and assistance that wouldn’t normally be provided (or expected) by the Council
- There has been a focus on equality with the development of Equality staff forums on Intranet
- The Covid situation has led to a more structured and focussed approach to the concept of the internal customers – eg in the way that Information had been provided and shared with staff
- Following the confirmation of the Interim MD as substantive in the role, a structural review of some directorates has been completed. A specific team has been developed to focus on the regeneration of the town centre
- There has been a formal review of the impacts for staff of working from home during Covid, and learning from this will be incorporated into the recovery plan

- There have been regular staff updates from MD during the lockdown to make sure everyone remained up to date
- Work has continued on 'Shaping a Brighter Future' and SWIS
- The Council has continued to do well on external accreditations and inspections (eg NE Better place to work)

### **Criterion 3 – Information and access**

- A new digital design platform has been purchased to enable the development of the online offer
- Website is to be replaced and the new design will take account of learning from resident consultations
- Information provided internally and externally re Covid – initially via a daily update but latterly with a weekly update
- Introduction of 'Setting the scene' – twice a year briefings for staff
- The Council has engaged extensively with local business and provided support through the Covid crisis
- A 'Dear Diary' project has been set up, encouraging residents to record their Covid experiences for future generations to share
- '7 ways to celebrate VE day from home' advice for residents
- Staff have been updated regarding plans for Council premises in the future (rationalising to two sites by 2025)

### **Criterion 4 – Service Delivery**

- Temporary closure of cash office – but letters sent to regular users to explain and give alternatives
- Annual report 2019-20 shows how performance has been maintained or improved
- Case study examples of agile and flexible responses to the needs of local businesses
- Positive customer feedback about service provision – sometimes feeling it is better than pre-Covid (eg booking system for household recycling centres)
- Very structured approach to developing services (eg via DSG) – format for outlining what is needed and why
- Very clear approach to planning (eg Digital and Customer Services delivery plan and project plans)
- Performance report for FOI and complaints shows good level of service and response (noted that the response times for FOI have been appropriately eased during the Covid crisis)
- Development of new digital magazine (due for issue in July)

### **Criterion 5 – Timeliness and Quality**

- Positive feedback from customers on the service offered by Registrars
- Range of case studies to show how the quality and timeliness of service has been maintained (and improved) during lockdown
- Covid hub activity reports show how services have been delivered effectively
- Covid operating model shows how needs are identified and provided for
- Low level of complaints compared to compliments – confirmed in complaints and compliments report
- Lots of compliments specifically on the Covid provision
- Evidence of early resolution being achieved in complaints process
- Range of performance reports from various services showing that standards for timeliness are being met
- Presentation on the work and impacts of the welfare support team

Updates re areas for development (evidence from this review is shown in red):

- Some staff feel that the digital offer 'has room for improvement'. This is being addressed in a number of projects and it will be important to review progress at the annual review  
**Massive leap forward due to Covid and the need to provide services differently**
- Evidence from staff shows that they often go beyond simply answering a customer's question. Consider whether it would add value to develop an explicit awareness in all staff of the difference between 'answering a question' and 'solving the problem'.

Lots of examples provided to show how this is continuing especially during lockdown – need to consider the formalising of the approach

- Review the impact of complaints training given to staff in May 2019. How has this made a difference? Also, has the new complaints procedure made any difference?  
**Complaints and compliments report provided**
- Review progress on the ‘Customer centric services’ project  
**Rapid developments due to Covid**
- Think about different ways to get customer feedback, avoiding the over-use of surveys
- Review progress on SWIS project – in particular, the decisions re buildings use, the impact of the customer voice and the impact of rolling out Office 365  
**See previous comments re Covid**
- Review progress on the ‘Family group conference’ service  
**Report provided**
- Consider any other areas where further compliance plus scores might be achieved at the annual review, particularly in criteria 4 and 5  
**Further 4 CP elements identified**

### New areas for development

- Several clients I have worked with over recent months have set up virtual staff rooms so that staff can chat and socialise with colleagues as they would in a physical staff room. Some have had this available so that it can be running in the background while staff work, while others have set aside specific times and invited staff to join in. This may be something you would consider to help staff wellbeing and to further promote good working and personal relationships between teams.
- While staff are taking well to working remotely it would be helpful to look at how they can be assisted in separating home life from work life. Although there are benefits in not having to commute to and from work, many people have used this time to create a buffer between home and work; they use the commuting time to ‘debrief’ and to move between home and work modes; this becomes more difficult when working from home and the boundary between home and work can become unclear. The Authority could look at ways to help staff recognise and deal with this issue effectively.
- As the Authority moves into and through the ‘recovery’ phase it will be important to identify those legacy elements that you want to preserve and to take forward. New ways of working have been developed that make sense, both for staff and for customers and it will be important to make sure that these benefits are preserved for the future.
- Although you are now up to 17 compliance plus elements, there may still be others that could be considered for the next review; consider which might be eligible and how this could be evidenced effectively next year. (Remember also that we will need to see evidence that the 17 already awarded remain valid next year).

### Partial Compliance elements

Element	Justification
NA	NONE

### Compliance Plus elements

Element	Justification
	Elements previously identified as CP (ie 111,113,121,135,211,213,216,224,341,342,343) all remain CP. The following 4 additional CP elements have been identified
112	Work in response to Covid has led to a deeper and more effective understanding of the needs and expectations of customers – even where these are above and beyond what the Council would normally be expected to provide

212	The focus of service development and delivery strategies has changed dramatically in order to respond effectively to the Covid crisis. Great care has been taken to make sure that the strategies in place truly reflect the needs and expectations of customers
323	Many changes have been made to the communications processes to make sure that everyone – both inside and outside the organisation – have access to relevant, comprehensive and up to date information. The Covid situation has continued to evolve and develop and the information processes have evolved to meet these changes. Things have been developed and implemented in record time to make sure that people are able to keep up to date
522	Very effective strategies have been put in place very quickly to make sure that customers' needs are identified fully and quickly. This has become increasingly important in the current situation and the approaches used have led to a wide range of need being identified and met that might otherwise have been missed

**Use of *Customer Service Excellence* marks**

No issues identified. The logo is used appropriately on email footers

<b>Provisional date for 24-month review visit</b>	22 <sup>nd</sup> and 23 <sup>rd</sup> July 2021
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**Section D: 24-month Review Report**

<b>Assessor name</b>		<b>Date of report</b>	
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**Changes in relation to the five criteria**

**The assessor should provide brief bullet points for each of the criteria to show what new evidence has been provided**

**Partial Compliance Elements**

<b>Element</b>	<b>Justification</b>

**Compliance Plus Elements**

<b>Element</b>	<b>Justification</b>

**Use of *Customer Service Excellence* marks**

<b>Provisional date for recertification visit</b>	
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## Section E: Notes

### Section A

#### *Definitions*

The four types of compliance that can be awarded through assessment against the *Customer Service Excellence* Standard are defined below.

**NON-COMPLIANCE:** Your organisation has little evidence of compliance or what evidence you do have refers to only a small part of your organisation.

**PARTIAL COMPLIANCE:** Your organisation has some evidence that demonstrates compliance against the element but there are significant gaps.

**FULL COMPLIANCE:** Your organisation has a variety of good quality evidence that demonstrates that you comply fully with the element. The evidence reflects that compliance is consistent and integrated into the organisation.

**COMPLIANCE PLUS:** Your organisation has shown that it has exceeded the requirements of the Standard against an element, demonstrated exceptional practice or can be used as an exemplar for others within or beyond your sector.

To achieve the *Customer Service Excellence*, an organisation:

- must not have any non-compliances;
- must have demonstrated compliance with each of the criteria, within acceptable tolerances.

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

	1	2	3	4	5	Total
Number of elements in the criterion	11	11	12	13	10	57
Maximum number of partial compliances allowed	2	2	2	3	2	11

### Section B

The scope of the assessment is to establish whether or not your organisation meets the requirements of the *Customer Service Excellence* Standard. Your report is based exclusively on factors which have been used to inform the assessor's recommendation about your certification to the quality mark.

### Section C

In order to maintain your certification to the *Customer Service Excellence* Standard, your assessor is required to undertake annual review visits following your initial certification date. Your first review visit must not exceed the 12-month anniversary from the date on your certificate.

The main focus for review activity will be to ensure that you remain compliant with the *Customer Service Excellence* Standard, what changes have occurred over the past year and your response to development points/partial compliances raised at your previous visit. The assessor will ask you to provide responses to the issues s/he raised last time.



At least two months prior to your first annual review visit, your assessor will require sight of the following documents.

- Latest performance data, showing 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/complaints information.
- Latest annual report.

Although a full document review is not required, s/he will use this submission to evaluate relevant details prior to the time spent on site with you.

Two months prior to your on-site assessment, your assessor will send you an assessment plan which covers the following generic assessment activities:

- talking to customers, staff and other stakeholders to obtain views on the service;
- observing your services in action;
- checking the appropriate use of certification marks;
- reviewing development points, partial compliances and compliance plus awards.

At the end of your 12-month review visit, the assessor will agree a provisional date for your 24-month review visit which, again, should be within 12 months of this visit.

## **Section D**

Please see the above notes for an expectation of what to expect for your second annual review visit.

At the end of your second review visit, your assessor will look at provisional dates for your recertification visit.