

PROPOSED MYSTERY SHOPPING EXERCISE and ON SITE REALITY CHECK for DEVON HOUSING AUTHORITIES

The proposal is to carry out a mystery shopping exercise and follow up on site reality check on housing advice and homelessness services for a number of housing authorities in Devon.

AIM

The aim of the exercise is to provide an independent assessment of the:

- accessibility of the services
- standard and appropriateness of staff response to enquiries
- accuracy and appropriateness of advice given and help offered and the throughput to homelessness (and housing register) services
- standard of homelessness case management and assessment and referral to other services where indicated.

METHODOLOGY

Preparation of case studies

An initial 'bank' of case scenarios will be prepared. These case studies will cover a range of housing problems and household types; they will vary in their degree of urgency and in the likely appropriate responses – advice, application as homeless or to the housing register, other response or referral to a more suitable agency. However they will be weighted to invite a degree of initial advice and assistance at time of contact.

About twelve case studies will then be selected from the 'bank' for presentation as mystery shopping scenarios to each participating authority's housing needs/advice and homelessness services. The scenarios will be given credence with the aid of additional local information – e.g. appropriate locations, private rented rent levels and locations, housing benefit reference rents etc. – provided by the authorities or obtained from the internet.

The Mystery Shoppers

The mystery shopping exercise will be carried out by Shelter staff and others, contracted on a confidential basis (see below). Shelter has considerable experience of carrying out this work. The initial exercise will be carried out by telephone. Each mystery shopper will assess the response to his or her call using a standard checklist. This will cover:- accessibility to help required, user care, accuracy, appropriateness and timeliness of information, advice and assistance offered and suitable internal or external referral. Each authority would receive 12 mystery shopper calls over an agreed two - three week period. The shopper's assessments and report on calls will then be collated and assessed by the Quality Team.

On Site Reality Check

Shelter's Quality Team will then undertake an on site reality check of two parts.

Firstly, records and files relating to the mystery calls will be traced and reviewed. In addition a further random but representative sample of about twenty to twenty five files will be reviewed and assessed against a number of standard quality criteria, on a five point scale with the mid point being the 'pass' level. The files reviewed will cover both housing advice and homelessness work.

The results of the exercise will then be collated and a report produced for each participating authority. The report will highlight the main findings of both the shopping exercise and audit, and make recommendations.

CONFIDENTIALITY

Shelter's Quality Team will carry out and co-ordinate the Mystery Shopping and Quality Audit programmes on a fully confidential basis, between the Quality Team and the individual authorities. No information about the authority or other organisations audited, members of the public or staff of other organisations gained during the exercise will be passed to any other person, including other sections of Shelter, without the explicit consent of the authority concerned.

Other Shelter staff and other persons participating in the mystery shopping element will be required to sign an undertaking to this effect.

DATA PROTECTION ACT 1998

Notes made during file audit will be recorded on an anonymous basis without any reference to identifiable details of the service user. For the purpose of verification the file reference number will be noted.

SHELTER'S QUALITY TEAM

Since 2001, Shelter's Quality Team has worked with over 40 local authorities throughout England including London Boroughs, rural district councils and borough and city councils of varying sizes. They now have considerable experience of undertaking audits, 'shopping' exercises, user feedback exercises and other quality assessments for local authorities, of both their own provision and that of contracted agencies such as RSL's and CABx. They have also worked as partners with other consultancy organisations, such as the Housing Quality Network, undertaking best value and pre-inspection work for authorities in both urban and rural settings.

They have developed a range of competitively priced consultancy services that can be tailored to meet specific requirements including:

- Policy and procedure reviews
- Mystery shopping and on-site reality checks
- Homelessness and housing advice file reviews
- Service user and stakeholder surveys
- Fundamental service reviews – resources, staffing and structures
- Improvement planning
- Reviewing the performance of contracted suppliers

THE AUDITORS

John Stevenson is currently Shelter's national Quality Manager. He has worked in housing advice for 24 years as adviser, centre manager and in various casework support and management posts for Shelter. He has, in his current post for Shelter, been responsible for developing Quality Standards and peer review audits of Shelter managed and funded centres. He was a member of the Lord Chancellors Department Quality Task Force, responsible for developing and setting quality standards and systems for the three-tier Quality Mark for the Community Legal Service which was launched in April 2000.

Bill Palmer is Deputy Quality Manager. He has been involved in advice work for 22 years. During an 18 year career with Shelter he has held a number of posts including Caseworker, Fieldworker, Policy Officer and National Manager of the Office of the Deputy Prime Minister funded National Homelessness Advice Service.

Mathew Cunningham is currently a Quality Officer for Shelter. He has 13 years experience of working in housing, both within the public and voluntary sectors. Prior to joining the Quality Team, he worked as a housing adviser for 3 years, based at Shelter's Devon HAC. Before that, Mathew held varying roles across all aspects of Plymouth City Council's housing service including, homelessness; housing advice; private sector renewal & enforcement; housing management and project development. Mathew is currently a member of the editorial board of the Citizens Advice produced 'Adviser' magazine, leading the team responsible for publication of all housing related articles.

All three members of the Team live in Devon or Somerset and so travel expenses should be reasonable.

