



Assessment Report

CUSTOMER SERVICE EXCELLENCE

Aberdeenshire Educational Psychology Service
2 SURVEILLANCE





1. EXECUTIVE SUMMARY

The assessment method used was a full remote assessment due to the current circumstances of the Covid19 Pandemic.

Following the assessment, Aberdeenshire Educational Psychology Service were found to have a deep understanding of, and commitment to, Customer Service Excellence. The commitment was displayed from Senior Management levels through to operations and front-line staff.

I would like to take this opportunity to thank those people involved in the overall assessment process. It has been a pleasure meeting with your team and having the opportunity to observe your service remotely.

The outcome of the assessment was -

"Continued award of the Customer Service Excellence Standard has been recommended"

Address:	Woodhill House, Westburn Road, Aberdeen, AB16 5GB		
Standard(s):	Customer Service Excellence	Accreditation Body(s)	UKAS
Representative:	Carron Douglas		
Site(s) assessed:	Educational Psychology Service Remote (Covid19)	Date(s) of audit(s):	24-11-2020
Lead Assessor:	Robert Sullivan	Additional team member(s):	
Type of Assessment:	Annual Review		
Review of Certification Claims	Claims are accurate and in accordance with SGS guidance		



2. CONTEXT

Aberdeenshire Educational Psychology Service provides a psychological service to a 0 – 25 years of age group. The service aims to bring psychology to the heart of learning and teaching, working with others to improve life experiences and outcomes for all children and young people. A key objective is to support the professional development and capacity of staff in educational establishments to build their skills and confidence in meeting learners' needs and raising attainment and achievement.

The service continues to face environmental challenges such as local authority budgetary constraints.

The service is delivered by:

- 1 Principal Psychologist
- 2.8 FTE Depute Principal Educational Psychologist post
- 16.2 FTE main grade Educational Psychologist post

In addition, the remit of the Principal Educational Psychologist has been extended beyond the Educational Psychology Service.

3. METHOD OF ASSESSMENT

The assessment method used was a full remote assessment due to the current circumstances of the Covid19 Pandemic. Evidence was submitted electronically via email and the assessment interviews and observations took place over the telephone and via computer. Microsoft Teams was used for the opening and closing meeting and to conduct interviews with staff and customers.

The assessment was undertaken in two stages; the first was a review of your self-assessment submission. This review enabled the Assessor to gain an understanding of how the organisation has met the requirements of the Customer Service Excellence standard.

The next stage was to review the actual service delivered remotely. This was conducted through reviewing practice as well as speaking to staff, partners and



customers. This included following customer journeys through your processes and how these aligned with customer insight.

During the assessment process, the criteria are scored on a four-band scale:

COMPLIANCE PLUS - Behaviours or practices which exceed the requirements of the standard and are viewed as exceptional or as exemplar to others, either within the applicant's organisation or the wider customer service arena.

COMPLIANT - Your organisation has a variety of good quality evidence which demonstrates that you comply fully with this element. The evidence which reflects compliance is consistent throughout and is embedded in the culture of the organisation.

PARTIAL COMPLIANCE - Your organisation has some evidence but there are significant gaps. The gaps could include:

- Parts of the applicant's organisation which are currently not compliant and/or
- Areas where the quality of the evidence is poor or incomplete and/or
- Areas which have begun to be addressed and are subject to significant further development and/or
- Areas where compliance has only been evident for a very short period of time

NON COMPLIANT - Your organisation has little or no evidence of compliance or what evidence you do have refers solely to a small (minor) part of your organisation.

The current scheme allows applicants a maximum number of partial compliances, equating to a pass mark of 80% for all criteria.

4. REMOTE MEETING

I was supported throughout the assessment by Carron other personnel within the organisation were involved when assessing activities within their responsibility.

The assessment activity and the partial compliances were discussed. The itinerary had been agreed with Aberdeenshire Educational Psychology Service in advance. The organisation was informed that all information obtained during the assessment would be treated as strictly confidential.



The scope of assessment was confirmed as: Aberdeenshire Educational Psychology Service

5. ON-SITE ASSESSMENT

The Assessor was supported throughout the assessment by Carron Douglas and other personnel within the organisation were involved when assessing activities within their responsibility.

The assessment resulted in the raising of a partial compliance and a number of observations these are listed in Section 6 and 7 of this report.

Number of good practices awarded during the assessment	22
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Have the partial compliance(s) raised at the last assessment been closed?	No
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Criterion	Maximum number of partial compliances	Actual number of non-compliances	Actual number of partial compliances	Actual number of Areas for Improvement	Fully Compliant
1 Customer Insight	2	0	0	0	11
2 The Culture of the Organisation	2	0	0	0	11
3 Information and Access	2	0	0	1	11
4 Delivery	3	0	0	0	13
5 Timeliness and Quality of Service	2	0	1	0	9





6. AREAS OF PARTIAL COMPLIANCE

CRITERION 1

No Partials Raised

CRITERION 2

No Partials Raised

CRITERION 3

No Partials Raised

CRITERION 4

No Partials Raised

CRITERION 5

5.3.2 At present you do not meet your standard for issuing the formal consultation record within the given timescale

7. OBSERVATIONS

Areas for Improvement cleared from the previous assessment visit

- At the last assessment it was noted that you may wish to utilise such as a Performance Dashboard or RAG (red, amber, green) system to provide an even greater focus on performance and your achievements. You are now developing a data dashboard and a performance management system (4.1.2)
- At the last assessment, we noted you could consider if a review of your standards and key performance indicators would be helpful. Also that you involve customers and other stakeholders as part of any such review. You are currently undertaking this (4.1.3)



During the site assessment the following general observations were made. These include: positive areas scored as Compliance Plus; areas of good practice; areas for improvement identified throughout the entire assessment process, as listed below.

Areas for Improvement

- 3.3.2 You may wish to evaluate better how customers interact with you through access channels and use this information to identify possible service improvements and offer better choices. This is particularly important given the significant increase in channel availability and access across websites, Social Media and YouTube

Areas of Good Practice

- Your Customer Service Excellence (CSE) preparation, evidence provision and overall planning continues to be very comprehensive. The Assessor would like to thank all staff and stakeholders for their very detailed contributions to this assessment
- You use the CSE Standard as a useful self-evaluation tool. The comprehensiveness of your evidence and the depth and detail in the sessions you hosted demonstrated your commitment to the process.
- During the various CSE evidence sessions, staff were keen to use these to explore ways of continually improving the service and were genuinely interested in stakeholders' views. Staff were enthusiastic and genuinely sought out the opinion of those contributing
- You have continued to review the opportunities for consulting and engaging with customers using effective and reliable methods. You increasingly involve customers and other stakeholders in the planning, delivery and evaluation of your work. This was evidenced during this assessment visit and confirmed in discussion with customers and partners. Your customer journeys also evidenced this. At this assessment the Assessor was involved in several remote discussions with your customers and saw other evidence of involvement
- You publicise satisfaction levels for all customer groups and parts of your service delivery. You do this through the publication of survey results and informal consultation feedback on your website

- You also publish your Standards and Quality report that gives detailed analysis of all of your self-evaluation activity and how that is used to inform your Service Improvement Plan. These documents were viewed by the Assessor at this remote assessment
- Your satisfaction levels are very high. The Assessor saw evidence of your parent/ carer survey and your Head Teacher survey. You also conducted a 'Team Wheel' where staff rated aspects of their work. This is being used to develop the service using staff expertise and customer insight
- You have recently improved opportunities for more informal discussions between staff to assist during the period of home working
- You review satisfaction levels over time are analysed to identify any trends that require action and to evaluate success. This is done routinely through the Review and Planning process with schools and the results of the parent/ stakeholder survey
- Your service has very high levels of parent/ carer participation at consultation stage
- You have proactively involved and consulted with parents about flexi-schooling and have taken account of findings in developing your service
- You have reviewed the nature and content of your information regularly to ensure it is easily accessible in terms of the complexity of language used and so forth. Online communications through a new standalone web site and video utilisation across a range of platforms including social media and a significant number of followers on Twitter are all examples of improved accessibility
- Your core consultation methods and ethos ensure that your work is founded upon customers' needs and preferences and these are reviewed on an ongoing basis both in terms of teachers, parents/ carers and young people. The service is customer-focused and uses high levels of insight to understand the evolving needs and preferences of a range of customers
- You have worked with partners to provide information and support materials. You worked with Head Teachers, Social Workers and others to highlight the availability of relevant materials. This is currently being evaluated where appropriate. This demonstrates staff using their insight to influence 'product' development

- You have researched how other services in Scotland deliver an Educational Psychology Service during the Covid-19 pandemic. This is a good example of learning and sharing.
- You have continued to give thought as to how to measure 'added value' resulting from your services in many ways. One example of this is more longitudinal assessment and evaluation of your training delivery and intervention effectiveness. An example being nurture training.
- There is an embedded, sustained, long-term and clear ethos of continuous improvement and customer focus throughout your service. You have a longstanding commitment to the Customer Service Excellence Standard, and you use this as part of your self-evaluation processes. You adopt a learning organisation approach and culture, which assists with ongoing innovation. This commitment is driven by Senior Management
- Throughout the assessment visit, the Assessor noted that staff are empowered and encouraged to use their professional knowledge and ideas and participate in your organisation's customer-focused culture. Staff are empowered as both individuals and as groups. You support collegiate development and reflective practice. The use of supervision triads and peer review is helpful
- At this assessment, you provided evidence of a structured induction and return to work process informed and refined using feedback from participants. You have further developed this during the Covid-19 process to take account of home working
- You continue to provide probationer and continuous professional development training in line with the needs of professional bodies and academic institutions where appropriate. Continuous Professional Development (CPD) and involvement in such as active research is encouraged and supported. This is also used to develop good practice and to evaluate the service being delivered. At this assessment, you evidenced staff involvement as practice tutors and guest lecturers on the MSc course at the University of Dundee, editorial roles in journals and publications in research journals
- You are working effectively with partners both within the Council and externally to evaluate and develop services in a more holistic way to provide a more seamless service and support for customers. Your Service Improvement Plan Groups involve working with external partners.



- You use various means to Quality Assure and to learn from each other's practice. You have supervision systems in place to support staff development and evaluate customer focus

Areas of Compliance Plus

- 1.1.1 You have again evidenced a very in-depth awareness and understanding of current and potential customers' characteristics. You could articulate how your work sits alongside National and Local Government strategies as well as meeting the evolving needs of stakeholders as identified through high levels of insight
- 1.1.2 You have a solid understanding of your customers' needs and preferences and continually develop and systematically refine this. The Assessor confirmed this during this assessment visit when discussing your work with staff, stakeholders and customers. The approaches, inputs and outcomes of each intervention are often different and tailored depending on the customer involved. The Assessor was able to discuss this with a range of customers, partners and staff when discussing your customer journeys during this assessment. Your consultation process and customer involvement embed the need to understand the customers' needs at your service's heart. Staff, customers and other stakeholders understand this longstanding mode of operation
- 1.1.3 You continue to align your resources to support communities and individuals with the greatest identified needs while taking account of staffing challenges and the need to help customers, local and Scottish Government objectives. You consider the specific needs of areas and customer groups in distributing your resources. This is embedded into your work and your Service Improvement Plan.
- 1.2.1 You have a well-developed and comprehensive strategy for engaging and involving customers using a range of methods appropriate to identified customer groups' needs. You do this in several ways through your improvement plan and your self-evaluation framework. Your operational methods are such that you operate in a very planned and evaluative way, including customers and others where appropriate. You have regular customer-focused meetings with Head Teachers to review their requirements and how this may be best supported. You check your operation to ensure your reviews best meet the needs of various customer types

- 1.2.2 Your consultation with customers is integral to continually improving your service and you advise customers of the results and action taken. Throughout this assessment, you gave numerous examples of where you have worked with stakeholders and changed your service as a result. This occurs at the individual case level and at a more general or 'product' and service level. Your staff work at an authority wide, cluster, school and personal customer level

- 1.3.1 You have continued to refine your already reliable and accurate methods to measure customer satisfaction regularly. You are aware of ways that require additional thought to improve response rates and stratification so that they are fully representative as standalone measures. You are continuing to develop, review and improve both qualitative and quantitative measures. You now collect the email addresses of parents and survey the whole population. You also conduct a sample follow-up telephone surveys

- 1.3.5 You have made positive changes to services because of analysing the customer experience, including improved customer journeys. Although working within a consultative framework and within professional boundaries, through analysis of customer journeys and customer involvement, you have continued to fine-tune your interventions to meet stakeholders' needs. There were several examples given during the assessment of this in practice. One example explored at this assessment was the parent helpline where you identified common areas of concern and produced a range of information to support these

- 2.1.1 You continue to have a strong corporate commitment to customers and have advocated for customers to improve the service delivered and the outcomes for that customer

- 2.1.2 In recognising the importance of having a positive impact on achievement and attainment, you work closely with partners and customers to develop service planning and delivery in ways that are more 'joined up' and meaningful to your customers. You work stakeholders to develop competence and capacity to support those involved

- 2.1.6 You have a robust self-assessment and continuous improvement ethos that has continued to support team and individual empowerment where the customer is at the heart of service delivery. This is a significant part of your development plan. Staff have a high level of empowerment and encouragement to promote and participate in the service's development.

- 2.2.1 You were able to demonstrate your commitment to training and development of staff and how this contributes to a customer-focused service
- 2.2.2 In all survey results and in discussion with staff and stakeholders, your staff's professionalism, politeness, and friendliness is viewed as consistently high. The Assessor was able to observe this during several group discussions on Teams at this remote assessment
- 2.2.3 You evaluate commitment to customer focus for both individual staff members and the team. You have developed a multi-layered approach to this through a tailored PRD and Supervision system. Also, you have several opportunities for peers to support personal development
- 2.2.4 The Assessor noted instances of staff fine-tuning how they operate to assess its impact. They evaluate the impact and share what they are doing with their colleagues. An example being the development of the staff wellbeing resource that was developed by staff. Several external stakeholders are now utilising this
- 3.1.1 You make information about the full range of services you provide available to your customers and potential customers, including how and when people can contact you, how your services are run and who is in charge. You have significantly improved this and have done so across multiple channels. You have developed a useful and popular website, telephone helpline, social media channels and YouTube. During this assessment visit, customers spoke of your information's availability and accessibility and parents commented on having a greater awareness and accessibility of your service.
- 3.2.1 You have developed your information in ways that meet your customer's needs over the last year. You are aware of the accessibility of material being important. You have developed online support materials, including video clips to support your customers. You have placed information on your new website and social media channels to great success
- 3.2.3 You have improved the information you provide to customers. You take account of their views in the redesign. You have consulted with operational staff to ensure the information you provide fits with their work. You have incorporated their experiences and ideas into the training to ensure it is coherent and cohesive

- 3.4.1 You work with a range of partners to support customers and provide more effective services. Your work with partners is critical and this is clear from your Service Improvement Plan.
- 3.4.3 Your work with the wider educational psychology community supports the professional enquiry and critical analysis aspects of the service. An example of this being working with NHS Education for Scotland and another Educational Psychology Service to develop a Mental Health, Knowledge and Skills Framework. Staff involvement in the Higher Education sector and their contributions to conferences and research publications also contributes and adds value more widely. This work enables you to refine your work to best support customers in an effective way
- 4.2.1 An integral part of your consultation process is reaching agreement with customers at the outset about what they can expect from the services you provide. In detailed discussions with staff and stakeholders, it was clear that your work is structured and keeps participants. You use your reports and action planning to ensure understanding
- 4.2.4 You have developed and learned from best practice identified within and outside our organisation, and you publish your examples externally where appropriate. Where probationers join your service, you benefit from their previous work experiences and learn from this through presentations. All staff are encouraged to participate in the annual Conference of Educational Psychologists and you often share your work and host workshops there.

8. ACTION PLANNING & NEXT STEPS

The achievement of Customer Service Excellence is an ongoing activity and it is important that Aberdeenshire Educational Psychology Service continues to meet the elements of the criteria throughout the three years the hallmark is awarded for. Efforts must be made by Customer Service Excellence holders to continually improve their service.

We recommend that you develop an action plan based on the findings of this report. The action plan does not need to be a separate document and is likely to be more effective if the actions are embedded in your normal improvement and service developments plans.



We will undertake an annual review that will look at your continued compliance with the Customer Service Excellence. As part of the review we will also look at progress on any findings of the previous assessments.

In addition to reviewing progress outlined above, we will also review the services delivery, done so by following customer journeys.

For more information on the annual review please refer to our document "Building on your Customer Service Excellence success – Preparing for the annual review".

Holders must inform SGS of any major changes in the service provision covered by the scope of the certificate. This includes reorganisation or mergers.

In addition, SGS must be informed should the certified service experience a significant increase in customer complaints or critical press coverage.

If you are in doubt at any stage, we strongly recommend contacting the Customer Service Team for advice on the significance of any service or organisational change, or issues surrounding customer complaints.

SGS will visit within the next 12 months for the annual review.

SGS recommends that Aberdeenshire Educational Psychology Service retains a copy of this report to aid continuous improvement, and as a reference document for future assessment reviews.