



Assessment Report

CUSTOMER SERVICE EXCELLENCE

Aberdeenshire Educational Psychology Service
3 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):	28-09-2021, 29-09-2021
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.

For the period of this report the service has faced changes in the way it operates due to Covid-19 restrictions and guidance. All staff continue to work from home, only visiting schools or office bases for exceptional reasons. Some school visits are now possible but mostly service delivery is online. All staff have appropriate ICT and access to appropriate platforms. This has continued to require many changes to working practices support mechanisms and professional learning challenges.

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 Douglas and 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	29
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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	1	10
2	The Culture of the Organisation	2	0	0	0	11
3	Information and Access	2	0	0	0	12
4	Delivery	3	0	0	1	12
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

3.3.2 You do now evaluate better how customers interact with you through access channels and use this information to identify possible service improvements and offer better choices. One example being the greater variety of access channels available including telephone and web-based access

Areas for Improvement

You may wish to consider if the use of Customer Journey Mapping would further enhance your understanding of the customer experience including their emotions, feelings, and behaviours particularly at touchpoints and Moments of Truth (1.3.5)

As you continue to develop your work using qualitative and quantitative data, you may wish to consider the use of software devised for analytics and to create user-friendly dashboards. Some examples include MS PowerBI and Tableau (4.1.2)

Areas of Good Practice

- Your Customer Service Excellence (CSE) preparation, evidence provision and overall planning continues to be very comprehensive. This included preparation for this remote assessment, evidence provided, links to additional evidence and significant staff and customer involvement during the remote assessment itself. 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



- At this remote assessment, it was good to experience the increased extent to which staff spoke about Customer Service Excellence and an increasing awareness of the customer
- 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
- You are continuing to develop new and improved means of measuring customer satisfaction in ways that are most meaningful whilst reducing any burden on customers
- 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 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. You also conducted a 'Team Wheel' where staff also 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



- The Assessor was able to speak with a wide range of customers during this assessment visit and their opinion of the service provided was very good
- You were keen to involve and engage with your customers and showed a desire to understand and to work to improve any aspects of the service customers were less satisfied with. This was evidenced throughout and was apparent during the customer and staff group sessions observed remotely at this assessment visit
- 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 continue to 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. Staff use their insight to influence 'product' and service development and you engage and involve customers in this process also
- 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 this and have shared your good practice
- 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
- You are aware of the different possible impacts of your training interventions and are developing a range of measures to better measure impact and outcomes over time
- 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. This was evident during the assessment when a wide range of staff led on, and participated in, sessions providing evidence for the Assessor and facilitated discussions with a range of customers
- You have a structured induction and return to work process informed and refined using feedback from participants. You have continued to review and update this. 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 continue to identify opportunities for research where that benefits your customers. You gave an example of conducting a literature review of the use of bio data to identify increased anxiety and improve its management. You are conducting applied research into the use of a Fitbit to analyse this and provide a young person with this information which can then support appropriate interventions by staff
- You report on your research findings to the wider community, and this was evidenced during this remote visit
- 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 Assurance 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 clearly 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. Staff discussed such as the Getting It Right For Every Child and other national initiatives throughout this assessment. In addition. They demonstrated a sound awareness of the characteristics of different geographic areas and communities within your Local Authority area
- 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. In discussion with Parents/ Carers, as well as School and Early Learning staff, this understanding and insight was confirmed
- 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. You now make use of additional data to help inform your strategy by looking at demand and interventions provided over the past period as well as predicting future demands taking account of wider societal and local issues

- 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 them following consultation meetings and throughout the customer journey. You discussed and evidenced new ways of distributing, collating, and analysing data to better measure satisfaction
- 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 provision of information leaflets including useful links to other resources aimed at parents/ carers and school staff. This allows individuals to access a different customer journey where a range of self-help materials can be accessed or used alongside school staff
- 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 are 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 wellbeing resource that was developed by staff. Several external stakeholders are now utilising this
- 2.2.5 You value the contribution your staff make to delivering customer focused services and leaders, managers and staff demonstrate these behaviours. At this assessment, senior managers were clearly thanking staff for their work and contribution to the service. Staff were confident and enthusiastic about sharing the work they were involved in
- 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. The session demonstrating the newly developed resources and its publication on your web page was a good example of this

- 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
- 3.4.2 Where you work in a joined-up way with other services, you make it clear to customers who is responsible for actions being undertaken
- 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. You are currently undertaking some research and are planning to disseminate its findings. Some staff are involved on the Board of professional Journals and staff are encouraged to contribute. 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 a range of psychology conferences and seminars
- 5.2.2 You 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. There are clear guidelines in place around roles and responsibilities and staff can check with colleagues to ensure the correct staff member is identified. Your consultation process ensures that you quickly identify customer needs and ensure correct staff and resources are identified. The action plan is used to record customer needs and the appropriate referrals made where appropriate

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.