Prince's Trust

The Prince's Trust Customer Feedback Guidance

Please consider the environment before printing this document

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Purpose

This guidance supports The Prince's Trust's Customer Feedback policy. It defines feedback and complaints, confirms who and how customer feedback might be registered, provides a flow chart on how we handle and analyse customer feedback, introduces the Promise Card and Poster and shows how to record customer feedback on TrustOnTrack.

The Prince's Trust aims to provide all its customers with a high standard of service. However, customer feedback may include complaints and we will endeavour to respond to these with efficiency, courtesy and fairness.

Definitions

Feedback is any comment made by a client or stakeholder which expresses an opinion or view on the way we have delivered a service or acted in accordance with our values.

A complaint is any contact made by a customer or stakeholder with The Prince's Trust, the purpose of which is to express dissatisfaction with our procedures, employees, partners, and quality of our services or charges.

Who might register customer feedback?

Young people, parents/guardians, supporters, partners, volunteers, media, general public, donors, sponsors and suppliers. Feedback from staff should be processed using existing management systems (e.g. self assessments, Team meetings, Quality Groups) whilst complaints from staff should be handled in accordance with the grievance procedure. Separately, feedback is also actively sought, captured and analysed within The Prince's Trust's evaluation framework.

How a customer may register feedback

Either in person, by telephone, in writing, by visiting our website, by email or via evaluation forms and possibly prompted by the Promise Card/Poster described on page five.

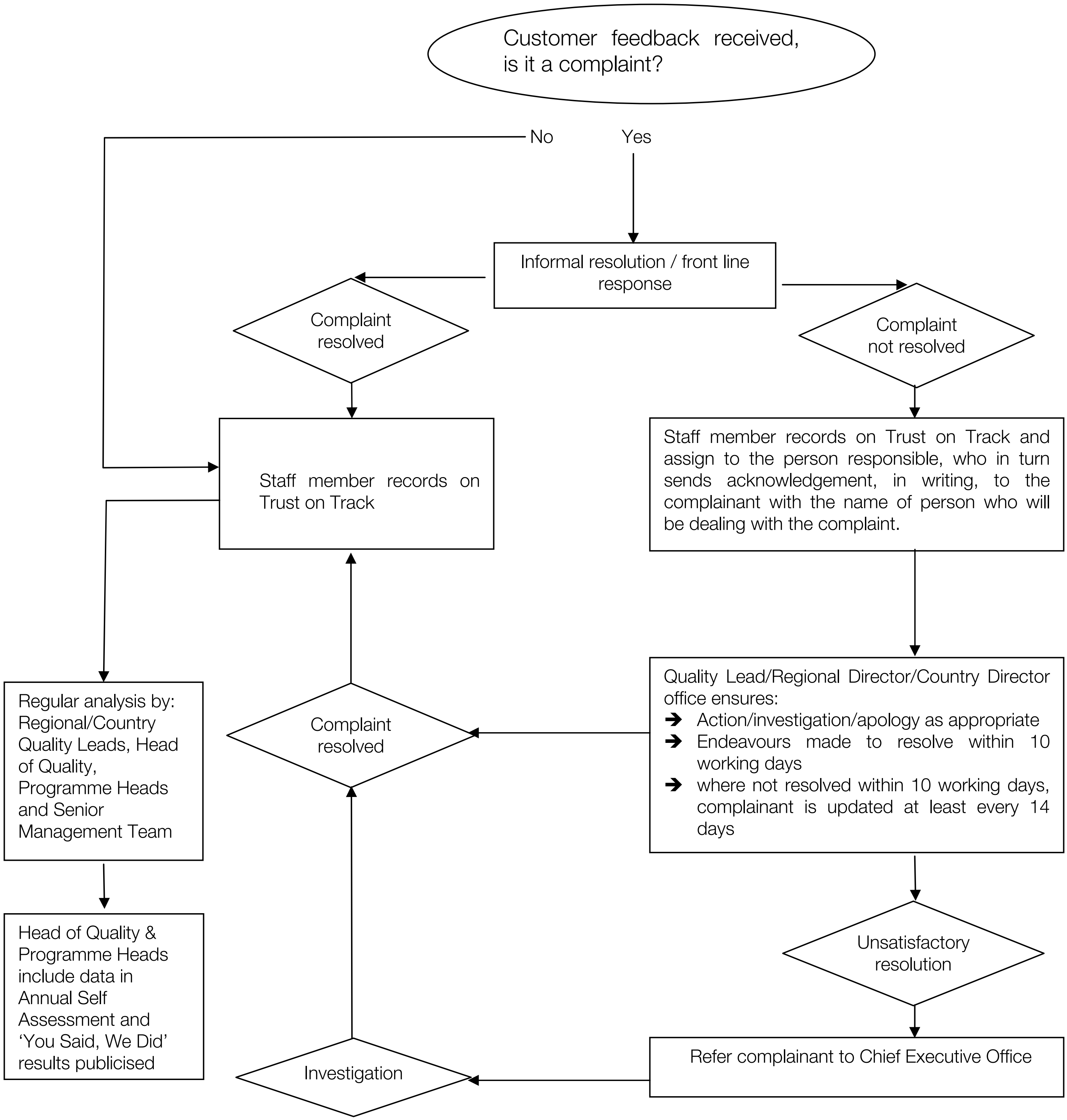
Regions/countries may receive customer feedback directly. Both the 0800 and Quality teams, based in Park Square East, may receive customer feedback (The Promise Cards/Posters provide email address, website link, 0800 number and address contact options which go through to these teams) and will record feedback on TrustonTrack whilst any complaints the teams receive will be emailed to an appropriate person, within the relevant region/country, to pursue.

The Customer Feedback flow chart, on the following page, must be followed in all instances by staff; where the feedback is from/relates to a young person, a group of young people or volunteer it must be recorded on the relevant TrustOnTrack record (staff without TrustOnTrack access may ask colleagues with access to enter the feedback) whilst all other customer feedback must be recorded against the Head of Quality Supporter record (page 6 provides guidance on recording customer feedback).

Whether providing their own customer feedback, or other stakeholders, volunteers must pass the details on to their main Prince's Trust staff contact, to register it, in the first instance.

How we handle customer feedback

The following flow chart should be followed when handling customer feedback:



The Promise Card/Posters

The purpose of the Promise Card/Poster is to help ensure young people we work with understand what to expect from us and how they can feedback their views. The Promise Cards/Posters can be ordered via the Trust Literature order line (Literature order numbers are DSN0654 for the Promise Card and DSN0659 for the Promise Poster which have a maximum order number of 500 and 50 respectively). They should be used as follows:

- → The Prince’s Trust Reception Areas: Promise Poster and Promise Cards displayed
- → Awards: Before being recommended to panel a young person should receive a Promise Card either when a) receiving application forms, b) in an introductory meeting or c) in an assessment meeting.
- → Business: A young person should receive a Promise Card in an introductory meeting (Future option to provide it in the 1 day business training course).
- → Get Into: A young person should receive a Promise Card during programme recruitment at either 1:1 interviews or taster days. Promise Posters should be provided to delivery partners, displayed in programme delivery space and the promise explained to participants on the first morning of the programme.
- → Team: Promise Cards should be issued via delivery partners at the same time as participant profile forms, one per young person. Promise Posters must be provided to delivery partners – enough for each location.
- → xl: Promise Cards should be issued via delivery partners at the same time as participant profile forms, one per young person. Promise Posters should be provided to delivery partners with their Welcome Packs.

The following sections describe how to record customer feedback on TrustOnTrack (staff without TrustOnTrack access may ask colleagues with access to enter the feedback). There are 4 different procedures to follow, based on from whom the feedback was received/is regarding:

Section 1. Feedback from/regarding a current or previous: Volunteer or Client or group of Clients

Section 2. Complaint from/regarding a current or previous: Volunteer or Client or group of Clients

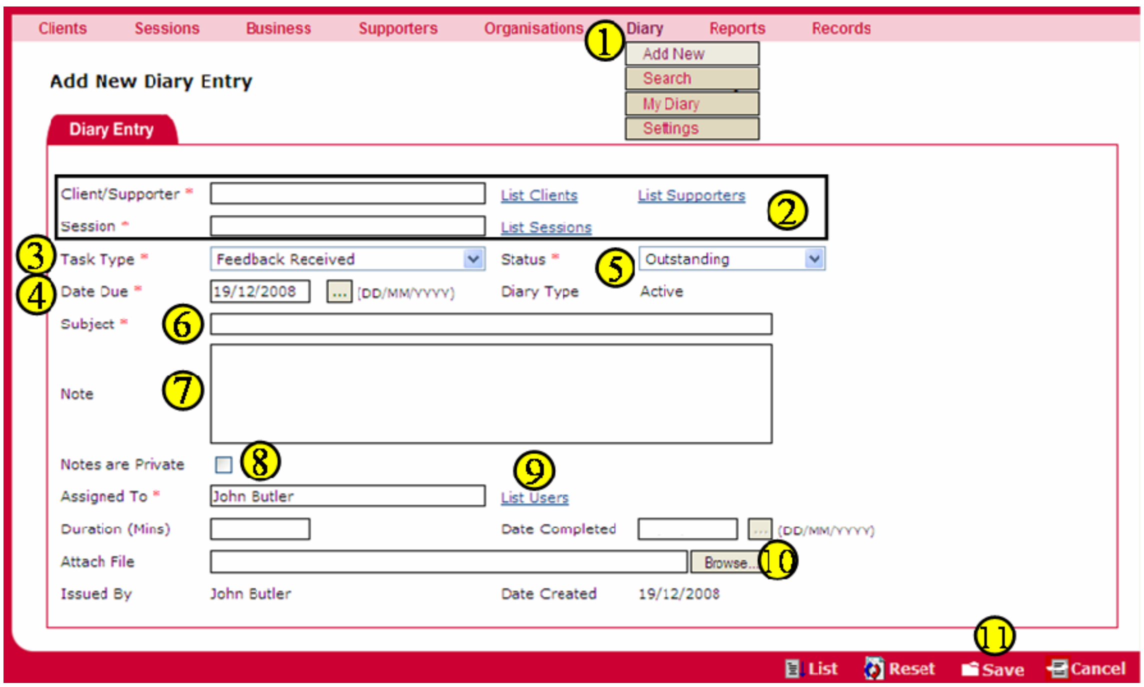
Section 3. Feedback from a potential Client, potential Volunteer, parents/guardians, supporters, partners, media, general public, donors, sponsors, affiliate stakeholders and suppliers

Section4. Complaint from a potential Client, potential Volunteer, parents/guardians, supporters, partners, media, general public, donors, sponsors, affiliate stakeholders and suppliers

Section 1 – Recording Feedback from/regarding a current or previous: Volunteer or Client or Group of Clients

Please note only feedback as per the definition on page 3 of this customer feedback guidance, should be entered into a TrustonTrack 'Feedback Received' Diary entry – general comments should be entered into a Diary entry with a Task Type of 'General'.

Go into the Young Persons module in TrustOnTrack and complete the following procedure:



1. On the top-menu, click 'Diary' and then 'Add New' – this will open the Add New Diary Entry screen;
2. **Click on the appropriate link to record who the Feedback is from**:
   - o <u>From a Client</u> – click the 'List Clients' link, and (in the window that opens) search for the Client, click on their name when it appears and the window will automatically close. You should now see the Client's name displayed in the "Client/Supporter" field (shown above);
   - o <u>From a Volunteer</u> – click the 'List Supporters' link, and (in the window that opens) search for the Supporter, click on their name when it appears and the window will automatically close. You should now see the Supporter's name displayed in the "Client/Supporter" field (shown above);
   - o <u>From a group of Clients</u> – click the 'List Sessions' link, and (in the window that opens) search for the Session the participants were involved in. Click on the Session name when it

appears and the window will automatically close. You should now see the Session name displayed in the "Session" field (shown above);

3. 'Task Type' – select "Feedback Received";
4. 'Date Due' – enter the date the feedback was received;
5. 'Status' – this defaults to Outstanding. For feedback you must change this to "Completed" and enter a 'Date Completed' – which is the date the feedback was received;

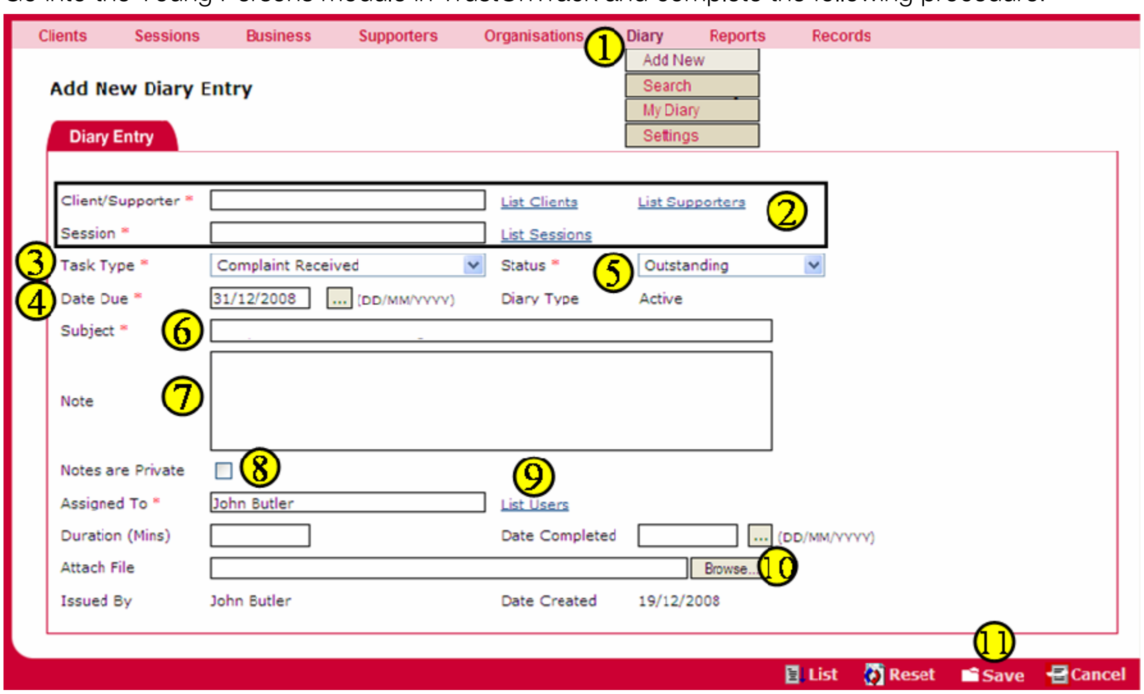
   'Subject' – brief statement of the feedback
6. 'Subject' – must follow the format:

   "<Region> – <subject of feedback>" (do <u>not</u> use comas ",")

   For example: "London – complaint about Team Session held on 25/03/<year>"
7. Click the 'Notes are Private' – where the feedback is considered to contain sensitive information (only the person who created the Diary Entry and the 'assigned to' staff may view the notes);
8. Click the 'List Users' link, and (in the window that opens) search for the Staff person to whom the feedback is most relevant. Click on their name when it appears and the window will automatically close. You should now see the Staff person's name displayed in the "Assigned To" field (shown above);
9. If you have an electronic copy of the feedback (e.g., email, Word document, etc.) you should attach it to the Diary Entry. Click the "Browse..." button, search for the document, and click on it to select it. You can only attach one document per Diary Entry, and this document cannot be more than 500KB is size;
10. Click the "Save" button and the Feedback is successfully recorded.

Section 2 – Recording a Complaint from/regarding a current or previous: Volunteer or Client or Group of Clients

Go into the Young Persons module in TrustOnTrack and complete the following procedure:



1. On the top-menu, click 'Diary' and then 'Add New' – this will open the Add New Diary Entry screen;
2. **Click on the appropriate link to record who the Complaint is from**:
   - <u>From a client</u> – click the 'List Clients' link, and (in the window that opens) search for the Client, click on their name when it appears and the window will automatically close. You should now see the Client's name displayed in the "Client/Supporter" field (shown above);

- o <u>From a supporter</u> – click the 'List Supporters' link, and (in the window that opens) search for the Supporter, click on their name when it appears and the window will automatically close. You should now see the Supporter's name displayed in the "Client/Supporter" field (shown above);
- o <u>From a group of Clients</u> – click the 'List Sessions' link, and (in the window that opens) search for the Session the participants were involved in. Click on the Session name when it appears and the window will automatically close. You should now see the Session name displayed in the "Session" field (shown above);

3. 'Task Type' – select "Complaint Received";
4. 'Date Due' – the <u>deadline</u> for the Complaint to be resolved;
5. 'Status' – this defaults to Outstanding.

   When the complaint has been resolved (as per the flow chart on page 4): You must change this to "Completed" and enter a 'Date Completed' – which is the date the complaint was resolved;
6. 'Subject' – must follow the format:

   "<Region> – <subject of feedback>" (do <u>not</u> use comas ",")

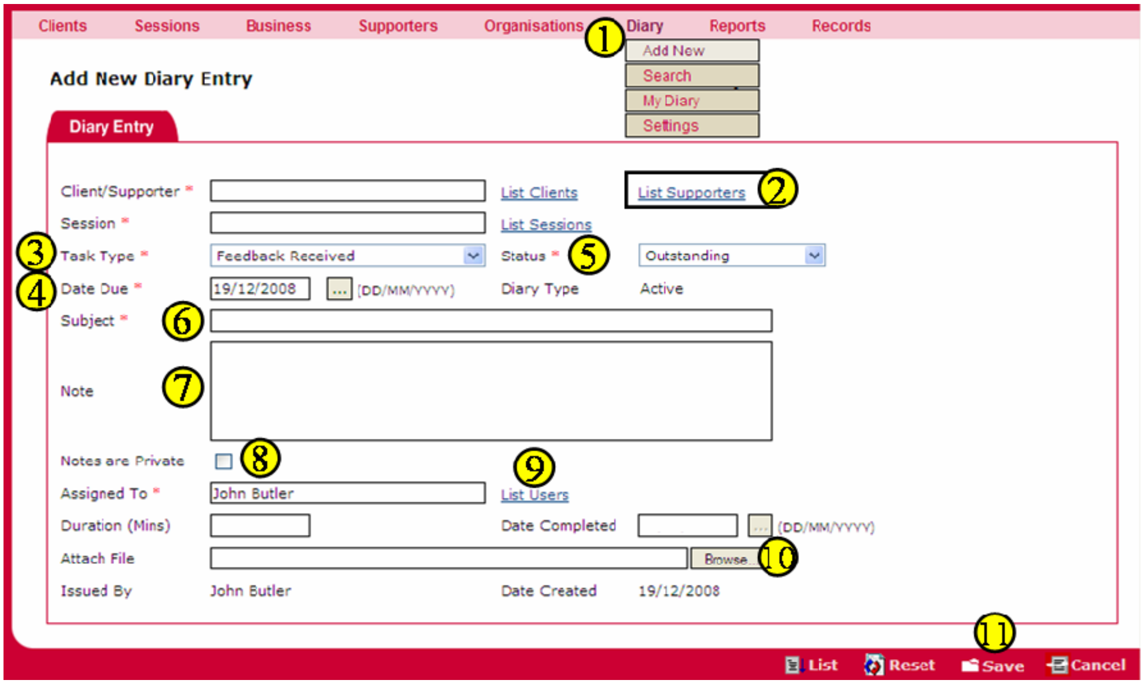
   For example: "London – complaint about Team Session held on 25/03/<year>"

7. 'Note' – enter more detail about the complaint as appropriate;
8. Click the 'Notes are Private' – where the complaint is considered to contain sensitive information (only the person who created the Diary Entry and the 'assigned to' staff may view the notes);
9. Click the 'List Users' link, and (in the window that opens) search for the Staff person most appropriate to resolve the complaint. Click on their name when it appears and the window will automatically close. You should now see the Staff person's name displayed in the "Assigned To" field (shown above);
10. If you have an electronic copy of the complaint (e.g., email, Word document, etc.) you should attach it to the Diary Entry. Click the "Browse..." button, search for the document, and click on it to select it. You can only attach one document per Diary Entry, and this document cannot be more than 500KB is size;
11. Click the "Save" button and the Complaint is successfully recorded.

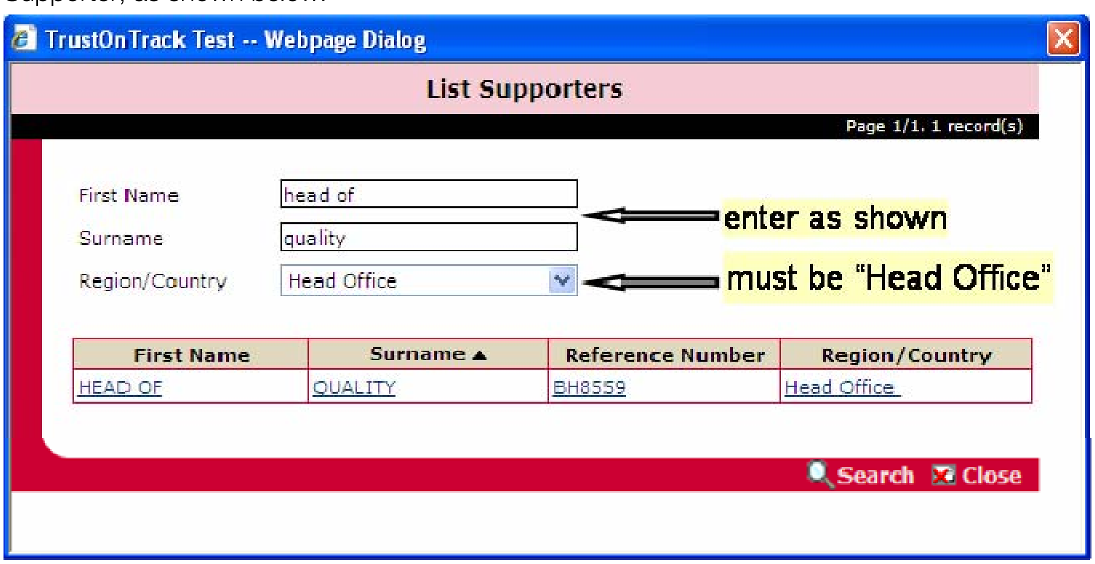
Section 3 – Recording Feedback from Other Sources

Please note only feedback as per the definition on page 3 of this customer feedback guidance, should be entered into a TrustonTrack 'Feedback Received' Diary entry – general comments should be entered into a Diary entry with a Task Type of 'General'.

You must complete the following procedure when recording feedback from parents/guardians, supporters, partners, media, general public, donors, sponsors, affiliate stakeholders and suppliers:



1. On the top-menu, click 'Diary' and then 'Add New' – this will open the Add New Diary Entry screen;
2. Click the 'List Supporters' link, and (in the window that opens) search for the "Head of Quality" Supporter, as shown below:



Click on the Head of Quality name when it appears and the window will automatically close. You should now see the Head of Quality name displayed in the "Client/Supporter" field.

3. 'Task Type' – select "Feedback Received";
4. 'Date Due' – enter the date the feedback was received;
5. 'Status' – this defaults to Outstanding. For feedback you must change this to "Completed" and enter a 'Date Completed' – which is the date the feedback was received;

6. ‘Subject’ – must follow the format:

   “<Region> – <Reporter Type> – <subject of feedback>” (do <u>not</u> use comas “,”)

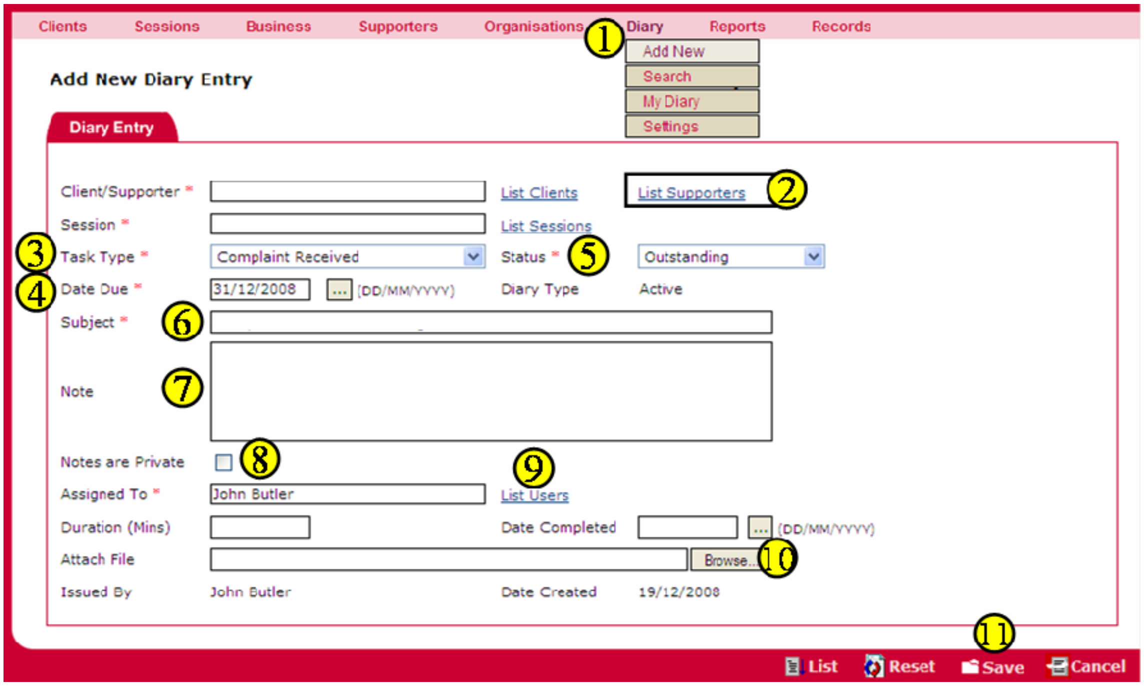
   For example: “London – General Public – feedback on the beinspired posters”

   “North East – Parents/Guardians – feedback on Community Cash Award project”

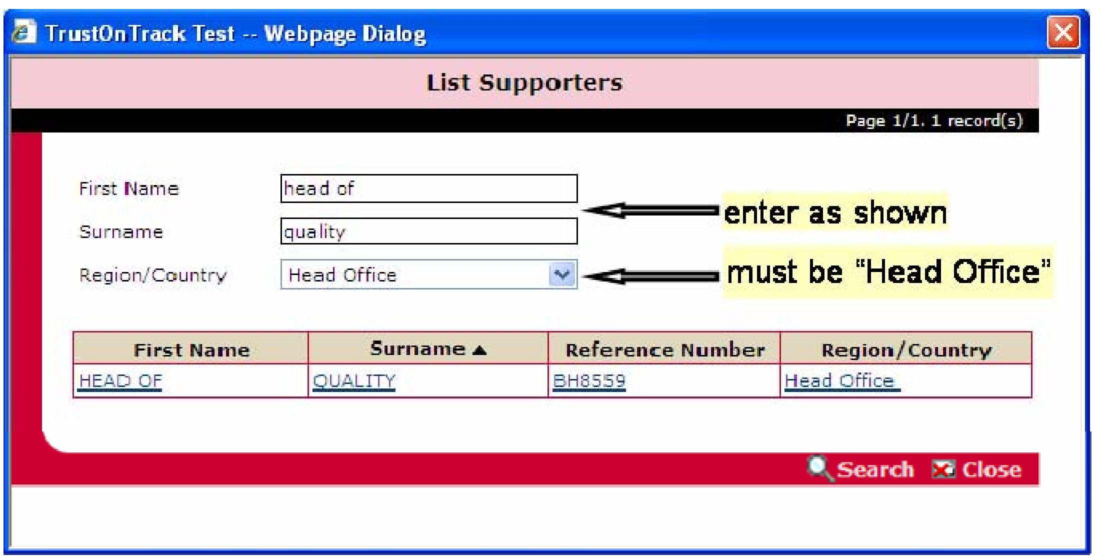
   Reporter Types:
   - Potential Client
   - Potential Volunteer
   - Parents/Guardians
   - Supporters
   - Partners
   - Media
   - General Public
   - Donors
   - Sponsors
   - Affiliate stakeholders
   - Suppliers
7. ‘Note’ – enter more detail about the feedback as appropriate. You <u>must</u> include certain key information:
   - Contact phone and/or email
   - Postal address
   - If a Supporter, the Supporter reference number in TrustOnTrack
   - Name of Organisation (if applicable)
8. Click the ‘Notes are Private’ – where the feedback is considered to contain sensitive information (only the person who created the Diary Entry and the ‘assigned to’ staff may view the notes);
9. Click the ‘List Users’ link, and (in the window that opens) search for the Staff person to whom the feedback is most relevant. Click on their name when it appears and the window will automatically close. You should now see the Staff person’s name displayed in the “Assigned To” field (shown above);
10. If you have an electronic copy of the feedback (e.g., email, Word document, etc.) you should attach it to the Diary Entry. Click the “Browse...” button, search for the document, and click on it to select it. You can only attach one document per Diary Entry, and this document cannot be more than 500KB is size;
11. Click the “Save” button and the Feedback is successfully recorded.

Section 4 – Recording Complaints from Other Sources

You must complete the following procedure when recording complaints from parents/guardians, supporters, partners, media, general public, donors, sponsors, affiliate stakeholders and suppliers:



1. On the top-menu, click 'Diary' and then 'Add New' – this will open the Add New Diary Entry screen;
2. Click the 'List Supporters' link, and (in the window that opens) search for the "Head of Quality" Supporter, as shown below:



Click on the Head of Quality name when it appears and the window will automatically close. You should now see the Head of Quality name displayed in the "Client/Supporter" field.

3. 'Task Type' – select "Feedback Received";
4. 'Date Due' – enter the date the feedback was received;
5. 'Status' – this defaults to Outstanding.

   When the complaint has been resolved (as per the flow chart on page 4): You must change this to "Completed" and enter a 'Date Completed' – which is the date the complaint was resolved;

6. 'Subject' – must follow the format:

   "<Region> – <Reporter Type> – <subject of feedback>" (do <u>not</u> use comas ",") For example: “London – General Public – complaint about the beinspired posters”

“North East – Parents/Guardians – complaint about a Community Cash Award project”

Reporter Types:

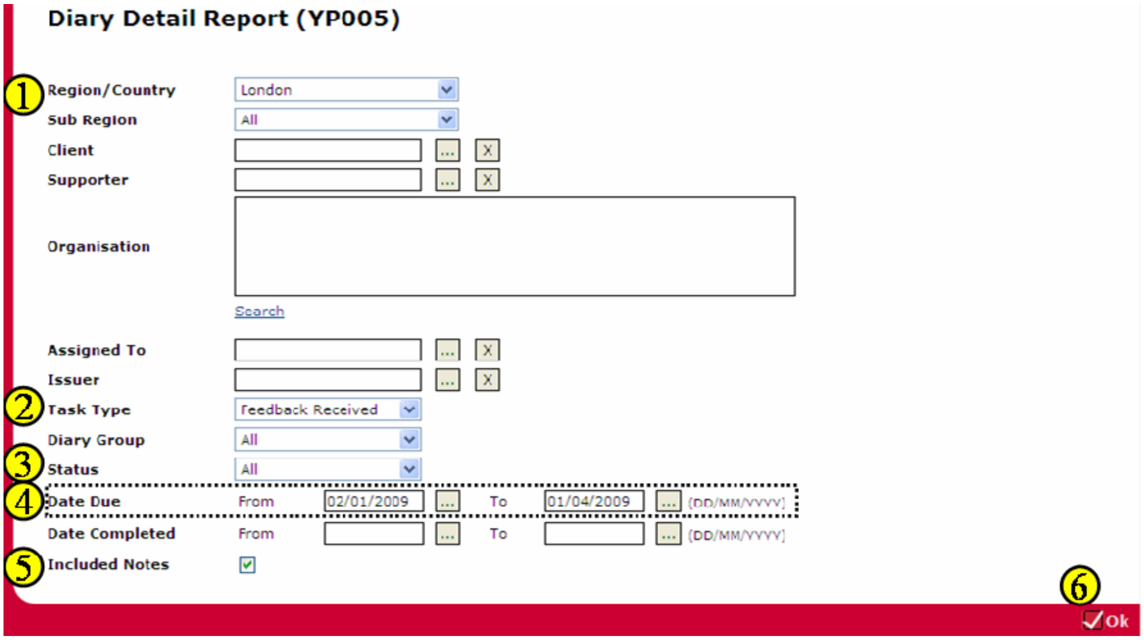
- Potential Client
- Potential Volunteer
- Parents/Guardians
- Supporters
- Partners
- Media
- General Public
- Donors
- Sponsors
- Affiliate stakeholders
- Suppliers

7. ‘Note’ – enter more detail about the complaint as appropriate. You must include certain key information:
   - Contact phone and/or email
   - Postal address
   - If a Supporter, the Supporter reference number in TrustOnTrack
   - Name of Organisation (if applicable)

8. Click the ‘Notes are Private’ – where the complaint is considered to contain sensitive information (only the person who created the Diary Entry and the ‘assigned to’ staff may view the notes);
9. Click the ‘List Users’ link, and (in the window that opens) search for the Staff person most appropriate to resolve the complaint. Click on their name when it appears and the window will automatically close. You should now see the Staff person’s name displayed in the “Assigned To” field (shown above);
10. If you have an electronic copy of the complaint (e.g., email, Word document, etc.) you should attach it to the Diary Entry. Click the “Browse...” button, search for the document, and click on it to select it. You can only attach one document per Diary Entry, and this document cannot be more than 500KB is size;
11. Click the “Save” button and the Complaint is successfully recorded.

Analysing Feedback/Complaints

In the Young Persons module, click on ‘Reports’ from the top-menu and then ‘Diary Detail Report’ and then fill out the parameters as described below:



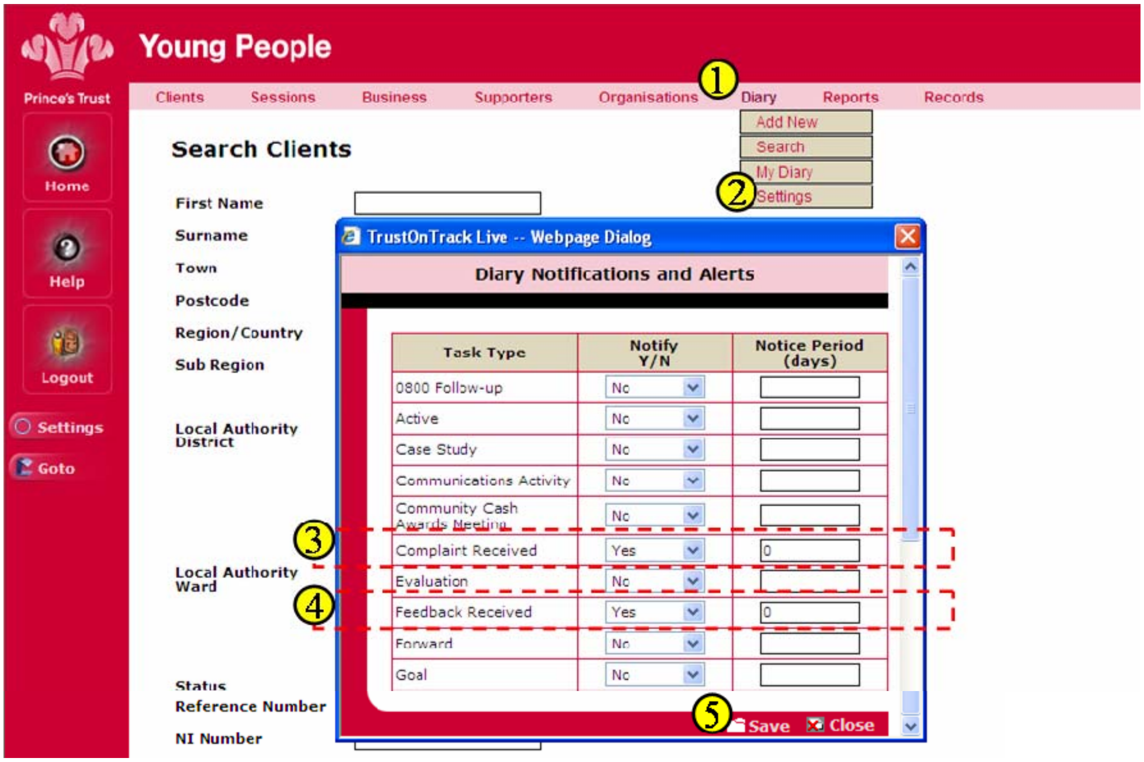
1. Complete the Region (and Sub Region if required) – leave as “All” to look across UK-wide;
2. From ‘Task Type’ click on ‘Complaint Received’ <u>or</u> ‘Feedback Received’;
3. ‘Status’ – set to “All”
4. ‘Date Due’ – you can limit your search by entering dates here. Remember that ‘Date Due’ is the date of the feedback <u>or</u> the deadline for the complaint to be resolved;
5. Tick the “Included Notes” box;
6. Click the “OK” button to run the report.

After a short time the report will appear in Excel for you to analyse.

Enabling Email Notifications From TrustOnTrack

If you are the person in your area likely to receive information on feedback or complaints (i.e., people will assign Diary Entries to your name), then you must enable email notifications from TrustOnTrack. Doing this means you will receive an email whenever you receive a Diary Entry regarding feedback or complaints, and this saves you from having to constantly check for these in TrustOnTrack.

To enable this handy feature, complete the following procedure:



1. In the Young Persons Module of TrustOnTrack, click 'Diary' from the top-menu;
2. In the list of options that appear, click 'Settings' – a box will now appear;
3. Next to "Complaint Received" change the 'Notify Y/N' box to YES and the 'Notice Period (days)' to 0 (zero);
4. Next to "Feedback Received" change the 'Notify Y/N' box to YES and the 'Notice Period (days)' to 0 (zero);
5. Scroll down and click the SAVE button

Close the box – you will now receive an email whenever a Diary Entry regarding feedback or a complaint is assigned to you in TrustOnTrack.

Further Information

The latest version of this guidance and the policy are retained on the Customer Focus Trustnet Page:

http://www.princes-trust.net/trustnet%20v2/Strategy%20And%20Policy/policy%20and%20procedures/customer%20focus.asp

Any queries regarding Customer Feedback should be addressed to the Quality Lead, Regional/Country Directors office or National Head of Quality.