



POLICIES & PROCEDURES

CUSTOMER COMPLAINT POLICY

The following are responsible for the development, review and oversight of this policy:

Staff: CEO

Department: Executive

Board Position: Chair,
Governance and
Administration

Board Committee: Governance and Administration

PURPOSE

Ve'ahavta is committed to providing high quality and appropriate services for each customer seeking services. Ve'ahavta recognizes that customers have the right to the opportunity of voicing their complaints to the agency about their experience with Ve'ahavta services.

POLICY

Ve'ahavta has the responsibility of ensuring that all customer complaints are reviewed and addressed in an appropriate and timely manner. The nature of complaints will be reviewed by management teams on a regular basis in order to make quality and process improvements to service.

DEFINITIONS

Customer:

The term customer encompasses program/services participants, applicants, volunteers, students, donors, community agencies and service partners.

Complaint:

A complaint is a formal expression of dissatisfaction or concern regarding services received. It can be expressed verbally, in writing or electronically.

As it relates to this policy, a service provision complaint can include issues related to program accessibility, quality, professionalism, communication, discrimination, privacy, facilities, staffing, customer service, safety or other similar issues.

PROCEDURAL GUIDELINES

The following section "Procedural Guidelines" represents best practices as determined by Ve'ahavta, and is largely designed to provide guidance to designated Ve'ahavta representatives. However, it is understood that, where appropriate, these representatives may adopt modified procedures in response to any given circumstance. Procedural Guidelines continue on the following page

Here are some things to think about and consider when you are implementing this policy:

- If a complaint is directed towards the person receiving the complaint, it must be forwarded to his/her immediate supervisor and he/she will determine if further contact with the customer should occur. No direct contact should occur with the customer, after the complaint is logged, without agreement from his/her Manager.
- A complaint might be made in person, by voicemail or by email.
- If the complaint is received by someone else (e.g., CEO/Board member) the complaint should be referred to the CEO who will direct it to the right individual for follow up.

- A complaint might be escalated at any point by the client to the CEO or Board Member. If a client indicates their intention to escalate the complaint, the employee should inform the person that the customer intends to contact.
- A complaint may involve others for consultation or negotiation with customer to resolve it.
- A complaint may come directly from the customer, a family member or someone else acting on behalf of the customer.

1. Complaint Intake Phase

The employee who receives the complaint informs the customer of the process in the Customer Complaint Policy and refers the complaint to the appropriate Director in written and verbal form. The Director will assume responsibility for the complaint at that stage and completes the phases of the process.

All employees who have had contact with the customer filing a complaint must maintain all relevant correspondences and records and ensure they are submitted to the appropriate Director.

2. Information Gathering

The Director will initiate verbal contact with the customer with best efforts within 2 business days of receiving the complaint and record the complaint in writing in more detail. The complete report should be shared with the Director of Operations who will review and determine if further action is required. The Director of Operations will also review complaints for quality outcomes, consider trends and ensure they are stored in a central file.

3. Determining Action

The Director will explore options to address the customer's complaint and determine suitable option(s) for addressing concerns. The Director will use discretion in determining the appropriate level of consultation required with the Director of Operations. The Director will work with the CEO or his designate to address any required actions related to Ve'ahavta staff as required and the CEO or designate will provide advice and direction as needed.

The Director will follow up with the customer with best efforts within 2 business days to present resolution option(s) (or a plan with timelines) and determine if this course of action will resolve the customer's issue(s). If the resolution is acceptable to the customer, the Director completes the complaint report with a description of the final resolution. The final report is shared with the Director of Operations who proceeds to closing the file.

If a program employee was involved in the complaint, the Director will inform him/her of the outcome/resolution.

If the situation is not acceptable to the customer, the Director will inform the customer that the complaint will be referred to the Director of Operations.

The Director of Operations will identify alternate resolutions or may refer the complaint to the CEO or may consult with the CEO on alternative actions or recommendations. Once an outcome is

decided, the Director of Operations, or alternate, will present the final resolution to the customer. There may be several discussions back and forth with the client until a final resolution is identified. When the complaint is resolved, the “Complaint Resolution Report” is completed and the file closing process is initiated.

4. Complaint Closing

The Director drafts a letter to the customer outlining the details of the situation and the final resolution. The Director forwards the draft letter to the Director of Operations. The Director sends the final letter to the customer.

The Director transfers the complete documentation including any scanned or original documents to the Director of Operations. The Director of Operations maintains all Ve’ahavta complaint files and responds to requests for complaint details as required by the CEO or Board members.

5. Funder Initiated Complaint

A funder complaint will typically be made with the CEO or Director of Development. In the case of the complaint being received by the CEO, as much detail as possible will be recorded in writing. The CEO would then forward the documentation to the Director of Development for follow up and action.

The Director of Development will initiate verbal contact with the funder with best efforts within 24 hours. The Director of Development will follow the policy and processes until a resolution is achieved and will inform the CEO of the outcome. The Director of Development will update the funder on the resolution of the complaint including a formal letter or email. The final report with recorded resolution will be sent to the Director of Operations to maintain the file.

6. Ongoing Complaint Review

All documents related to a client complaint will be filed and stored by the Director of Operations.

All complaints will be reviewed by the Director of Operations who is responsible for reviewing all resolved complaints to identify trends and ensure the quality of resolution.

Program Directors will hold “lessons learned” discussions in their team meetings to make changes and/or improvements to service as required. This can be optional if there are confidentiality concerns with sharing the details of the complaint with the team.

A summary report including the number, type, and disposition of complaints is presented to the board bi-annually, or more often as required for more urgent matters that pose a risk to the organization or its stakeholders.

INFORMATION ABOUT THIS POLICY

Original Effective Date: June 26, 2014

Last Update Date: October 5, 2016

Review Period: Every two years

Board Approval Date: January 5, 2016

Date of Next Update: December 2017