

**Customer Engagement
Strategy
2024-2027**

Section 1 - Introduction and Aims

- 1.1 Oak Tree Housing Association (OTHA) strategy aims to support and encourage customer engagement by providing an effective framework for involving our customers in shaping our direction and services. The strategy is about how we can optimise customer engagement activity.
- 1.2 We know that we need to understand our customers to be able to make sure we can be responsive to their needs.
- 1.3 Effective customer engagement can help us achieve:
 - Strong partnerships between our customer and OTHA
 - Accountability to customers
 - Service Improvements
 - Customer Influence and empowerment
 - Increased customer satisfaction and
 - Value for money
- 1.4 Ensure all aims are Specific, Achievable, Relevant and Time-bound (SMART).

Our strategy will:

✓ **Link to our business plan**

Our Customer Engagement Strategy is linked directly to our objectives in our Business Plan, which is a formal statement setting out the goals of the Association and how we plan to reach those goals.

✓ **Link to our Community Investment Strategy**

✓ **Ensure we meet the Scottish Social Housing Charter Outcome 3**

Outcome 3: Participation

Social landlords manage their businesses so that tenants and other customers find it easy to participate in and influence their landlord's decisions at a level they feel comfortable with.

This outcome describes what landlords should achieve by meeting their statutory duties on tenant participation. It covers how social landlords gather and take account of the views and priorities of their tenants, other customers, and bodies representing them such as registered tenant organisations; how they shape their services to reflect these views; and how they help tenants and other customers, and bodies representing them such as registered tenant organisations to become more capable of involvement - this could include supporting them to scrutinise landlord services.

We will involve customers in the assessment of our performance as required by the Scottish Housing Regulator (SHR) in the process of developing our assurance

statement and to ensure that the performance measures and action plan within the strategy is developed with customers and kept under review.

✓ **Comply with the law**

The Association is committed to ensuring that we comply with the legal requirements set out by the Housing (Scotland) Act 2001 and to meet our obligations to consult with our customers, to produce a customer engagement strategy and to hold a register of tenant organisations.

✓ **Link to our policy framework**

The strategy has clear links to many of the association's policies and strategic documents as it underpins the landlord/customer relationship, which in turn affects most of our activities.

✓ **Be flexible enough to work for different types of customers of the association.**

Our customers can be tenants of the Association, owners in factored or mixed tenure properties or other service users who have an interest in decisions that affect them in their homes and in their communities. We aim to put our customers at the heart of service provision to help us to provide responsive services that meet their needs.

✓ **Deliver change.**

As a result of effective customer engagement, we aim to:

- improve overall satisfaction with our service delivery.
- gain greater value for the money we spend.
- improve communication between staff and tenants.

✓ **Improve our relationship with our customers.**

Our strategy aims to:

- empower our customers to have the confidence to give us their views and influence decisions.
- enable staff and customers to be more aware of each other's perspectives.
- minimise misunderstandings, build trust and mutual respect between landlord and customers.

✓ **Develop and improve over time.**

We recognise that it takes time to achieve these benefits, and that Customer Engagement must be developed at a pace that customers are comfortable with.

✓ **Give a structure for our activities.**

We will jointly develop an engagement action plan and calendar, which will be reviewed and agreed on an annual basis.

We will:

- carry out an assessment against the performance measures for the Scottish Housing Social Charter annually.
- involve customers to direct and contribute to the development of our assurance statement & self-assessment processes.
- involve customers in the development and agreement of the action plan and calendar for customer involvement each year.
- monitor how we are performing against each item set out in the action plan.

Section 2 – The Scottish Housing Regulator

2.1 The Scottish Housing Regulator is an independent organisation; it reports to the Scottish Parliament. Its role is to protect the interests of tenants and others who use landlords' services. The Regulator expects tenants to be at the heart of their organisation and work in partnership with their landlord to drive forward improvements to services and performance. How landlords perform is monitored every year against the Scottish Social Housing Charter. The Regulator expects arrangements to be in place to make sure customers can –

- . *scrutinise services and performance*
- . *help improve landlord's performance*
- . *influence decisions about policies and services.*

2.2 The Regulator has a route for tenants to report Significant Performance Failures to them. A significant performance failure is for example where a landlord:

- Consistently or repeatedly fails to achieve the Charter outcomes or local outcomes agreed with tenants*
- The landlord's actions or failure to take action puts tenant's interests at risk and this affects a significant number of tenants.*

Section 3 – The Scottish Housing Charter

- 3.1 The Charter was created by tenants for tenants, it is about improving the quality of services to tenants. The Charter has 16 standards that landlords will be measured against, such as quality of homes, repairs and maintenance and customer participation.
- 3.2 The Charter allows us to better understand what is working and what is not. We take these responsibilities seriously and this Strategy is about making sure customers have the opportunity and skills to exercise real influence on our services and performance. We measure our performance by carrying out surveys on some of core service for example repairs, new tenant visits and estate management.

Registered Social Landlords must meet the standards set out in the Scottish Social Housing Charter.

- 3.3 The Charter aims to:

-State clearly the services tenants and other customers can expect, and help tenants hold their landlord to account
-Encourage social landlords to focus on improving the services that matter most to their customers
-Provide a basis for the Scottish Housing Regulator to assess and report on how well landlords are performing

The Charter places importance on tenants being able to assess the quality of their landlords' services and performance.

Section 4 - Understanding our Customers

- 4.1 Customer engagement in housing associations is the process of sharing ideas and information with customers and involving them in the development of services. It's about ensuring that customers feel heard and that their feedback is acted upon.
- 4.2 We need to understand our customers so that we can reflect customers' needs in what we do and how we do it. This applies to the process of customer engagement as much as it does to general services. There may be barriers that get in the way of effective engagement for example language and accessibility. To overcome this we will arrange interpreters if required and ensure where we host event is accessible to everyone.
- 4.3 Through our Customer Satisfaction Surveys we seek to understand who are customers are and their priorities so that we can reflect their changing needs and expectations in what we do and how we do it.
- 4.4 We aim to be a customer-focused and proactive organisation, so we use 'customer insight' to better understand the views and experiences of

customers in improving services and making an impact. Customer insight entails:

*-using information about customers to better understand who they are, their needs, wants, expectations and experiences; and
-actively applying this understanding in the design and delivery of services that better meet customers' needs.*

4.5 Effective use of customer insight helps us to:

*-deliver tailored services for different individuals/groups' needs where appropriate;
-target resources towards priority groups or services; and
-target consultation and provision of information.*

4.6 From this, we can:

-deliver services effectively and efficiently; and optimise customer satisfaction

Section 5 - Information and communication for our Customers

- 5.1 We will encourage involvement of all customers regardless of age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation.
- 5.2 We will ensure our Equal Opportunities and Diversity Policy, is easily accessible and updated regularly.
- 5.3 The Association is committed to ensuring the provision of information that best suits the customer:
- Written communication will be provided in Plain English.
 - Offer multiple communication channels for example email, social media to cater to diverse preferences.
 - Customers will be offered information in the appropriate format where requested e.g. large print, audio, and in ethnic languages.
 - When arranging meetings, we will consider the different needs of different customers and endeavour to meet them. We will assist customers by providing signers and interpreters for meetings on request and will ensure that all venues are fully accessible. We will consider providing crèche facilities or the timing of meetings to assist parents or working tenants to attend.
 - Customers will be asked by staff to provide details of any requirements and will be encouraged to advise us if their needs change.

We will ensure we use a variety of communication methods for providing information, to start the process of engagement. Every contact with a customer is an opportunity for engagement.

Section 6 - How We Will Engage

- 6.1 There are various ways in which information can be obtained and passed to customers. The methods we use will depend upon the nature of what we are reviewing and the methods preferred by customers.
- 6.2 Provide a schedule of engagement activities to keep customers informed and involved.
- 6.3 Adopt new technologies (e.g., virtual meetings, online forums) to enhance engagement.
- 6.4 We aim to offer customers different ways of engaging in influencing and improving our services, including those customers who may not have previously been involved. As the world changes and modern methods of communication evolve, we look to the most effective and relevant ways of communicating and consulting, including new media and technology where appropriate. Our engagement activities have a clear focus and impact on improving services and will monitor and review the outcomes from engagement activities.
- 6.5 The Association is committed to involving customers in developing and reviewing key policies and other documents that affect them. We use various techniques, such as those described in **Section 8** below, and take all reasonable steps to encourage participation. However, we fully respect a customer's right **not** to participate. Where it is clear that an individual customer does not wish to participate, then we will observe this right.

Section 7: Resources and Training

- 7.1 The Association employs a Customer Engagement Officer to lead on our customer engagement activities, but all staff have a remit to engage with customers. This is part of their day-to-day work as well as having scheduled activities which are carried out from time to time.
- 7.2 We will work with partners to build the capacity for engagement to assist with tenant engagement and scrutiny where this is appropriate.
- 7.3 We have a dedicated budget which is reviewed annually and set at a level to allow the delivery of the strategy. This includes a budget to support Registered Tenants Organisations, costs of holding events; holding consultations and meetings; membership of relevant bodies; training costs; prize draws (for example attending our AGM, Conversation Cafes or participating in our Garden Competition), cost of independent satisfaction survey and other administrative costs.

- 7.4 We will provide clear guidelines for the formation and support of Registered Tenants Organisations.
- 7.5 We will offer ongoing training opportunities to keep staff and tenants informed about best practices.
- 7.6 We will develop a training program for Management Committee members to enhance their effectiveness.

Section 8 - How We Will Monitor and Report Progress

- 8.1 We want to have an effective Customer Engagement Strategy so we will monitor, review and measure its effectiveness.
- 8.2 In addition we will report on progress on customer services and customer feedback and what we have done with this.
- 8.3 How we will do all of this is set out below:

| Area | How Reviewed and Measured | How Published and Reported |
|-----------------------------------|--|--|
| Key Performance Indicators (KPIs) | Performance on the Association's targets relating to all service areas and the Scottish Social Housing Charter. Our Annual Return on the Charter (ARC) covers key performance indicators and definitions prescribed by the SHR – it is approved by our Management Committee and submitted to the SHR at the end of every financial year. | Articles on website and in newsletters. Annual performance report. ARC data is publicly available on the SHR's website to review and compare our performance against that of all Registered Social Landlords (RSLs). |
| Customer Complaints | Performance against targets for Stage 1 and Stage 2 Complaints. | Articles on website and in newsletters. Annual performance report. |
| You Said, We Did | Report outlining customer feedback received from routine independent monitoring and complaints data and how this has been used to inform and improve services. | Articles on website and in newsletters. Annual performance report. |
| Annual Performance Report | Annual report detailing performance results against Scottish Social Housing Charter outcomes. Will show 3 years trend data where available. | Annually to all tenants. Annually on website. |

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|---|---|---|
| Management Committee Agendas and Minutes SHR Annual Assurance Statement and Engagement Plan. | Publish non-confidential Board minutes. Annual Assurance Statement submitted to the SHR and our Engagement Plan from the SHR. | Website following each meeting. Available annually on our website and newsletter and on the SHR website. |
| Policies | We carry out consultation surveys or publish out policies on our website asking for feedback. | Website as updated. |
| External Audit Report | The Association's Audit Summary Report will be available on request. The external auditor will present the audited accounts at the AGM. | Annually. |

Section 9 - Toolkit for Engagement

- 9.1 Regularly assess the effectiveness of engagement methods and adjust as needed.
- 9.2 Encourage feedback from customers on preferred engagement methods.
- 9.3 The following is a summary of our key mechanisms for engagement with our customers:

Independent Tenant Satisfaction Survey – an independent survey of tenants is carried out on a regular basis every 3 years to provide a benchmark of how services are being received. The content & methodology is partly determined by the information required for the ARC, but also takes into account consultation with customers on areas we should be considering. The survey also helps us identify people who may be willing to be part of other consultation activities and plays a part in identifying what areas of service need to be reviewed.

On-going Service Satisfaction Surveys and Questionnaires – We use a range of surveys to measure satisfaction levels with our main on-going services. We carry out our surveys in various methods including CX Feedback, email, text, telephone, postal and on our website and social media platforms.

Service Review Groups – When there is a service or policy review, we will hold consultation meetings or host a conversation café. We will also carry out consultation through our CX Feedback and by post. With our Community Engagement Officer in post, we are aiming to create a service group and these customers will be drawn from people who have expressed an interest in being involved or who may have recent experience of a service including people who may have recently made a complaint. The information gathered from these meetings play an important role in informing the

decisions made and how we go about implementing any changes or improvements. Out of pocket expenses for e.g. bus fares, taxi fares will be refunded to those in attendance and we may offer other incentives to attend.

Public Events – Events may be held to promote a service, give information out, to consult on a major issue or for social/community reasons or celebrate a success for example new build coming off site. We also attend joint events in partnership with other RSL's or agencies such as community Fun Days and Christmas events. These allow face to face contact with customers to comment on any current housing issues and to give information on any future changes in service delivery that may affect them. It is also an opportunity for customers to find out more about our consultation activities and to sign up to take part.

AGM – Meeting takes place every August and this is for Shareholder Members

Estate Inspections/Wednesday Walkabouts – tenants and residents can meet with staff from to inspect communal areas locally and work together to resolve any problems. These are normally done annually or more often where there is a problem or at the request of residents.

Conversation Cafes – held quarterly to discuss housing and general topics.

Registered Tenants Organisations (RTOs) – This is a more formal way of engagement with the Association. An RTO is an independent organisation set up to represent tenants and residents in their local area, operating in a way that meets the requirements of housing legislation. They will have elected office bearers and a formal constitution. RTOs can seek registration with their landlord, which opens access to grant funding and other support. RTOs have a recognised role in tenant participation and must be consulted on any proposed changes to policy and any changes to service standards. Our policy in relation to registration and support is available separately.

Customer Focus Groups – We are aiming to create short life focus groups to focus and review specific areas of our service. The group will look at our performance, satisfaction, good practice and suggested service improvements.

Informal Community Groups – These groups are set up to represent tenants, residents or other interested parties in their local area and usually meet to discuss housing issues affecting them and other matters of interest in their community. Staff from the Association will attend meetings if invited, to discuss areas of common interest or local concerns.

Community Partnership Meetings & Community Councils – We will take part in discussions that focus on housing issues, the environment and wider issues in your community subject to an assessment of relevance and staff resources.

Newsletter – We are always looking for articles for our newsletter and this aims to inform residents about current housing issues and give feedback on the outcome of engagement activities. We include a regular 'you said, we did' article to tell you what changes have been made as a result of customer feedback. We welcome any ideas

or suggestions of what tenants would like to read about. Our newsletters are sent out via post on a quarterly basis.

Review of Complaints - Every contact with a customer is an opportunity to engage with them and the feedback from a customer, who has had a bad experience, is particularly valuable. We review our complaints to make sure we learn from them. The details are reported to our Management Committee with a summary of the main changes to services, which have been implemented as a result of the feedback from complaints. We publish details on our website and newsletter quarterly.

Section 10: Performance Review

- 10.1 We are committed to developing an effective customer engagement strategy, which means we will monitor, review and measure its effectiveness. We have identified a number of key actions, priorities and outcomes forming an action plan. We will review the progress of the customer engagement strategy against these.
- 10.2 Align the Customer Engagement Calendar with other organisational planning processes.
- 10.3 Use survey results to identify trends and areas for improvement.
- 10.4 We will consider the effectiveness of specific activities in light of the following:
 - The number of customers who participated
 - The resources required to obtain feedback
 - The quality of the feedback obtained
 - Whether the engagement activity successfully engaged a range of customers from different groups (including hard to reach groups)

Section 8 Policy Review

The strategy will be reviewed every 3 years but may be amended sooner to reflect changes to legislation, regulations and/or necessary changes identified with our customers.