

# **Customer Engagement Strategy 2021-2024**

**Oak Tree Housing  
Association Ltd**

## **Jargon Buster**

This section gives information on some of the unfamiliar terms used in the strategy:

**ARC** – Annual Return on the Charter. The ARC is an annual return to the Scottish Housing Regulator containing a range of information on performance and the context in which we work.

**Assurance statement** – add section

**Business Plan** – a formal statement setting out the goals of the Association and how these goals will be achieved.

**Management Committee** – a voluntary group of representatives from the community and tenant members elected from shareholders who direct the Association's activities.

**Code of Conduct** – sets out minimum standards for behaviour for contact between the staff, contractors and customers.

**Customers** – our main customers are the tenants of the association and owners to whom we provide a factoring service. We also deliver some level of service to applicants for housing, leaseholders and owners in mixed tenure estates where we manage scheme repairs.

**Customer Panel** – a group made up of staff and tenants who work together to develop consultation and check the progress of the strategy.

**Monitoring** – check progress.

**Measuring performance** – assessment of the results at the end of any activity.

**Outcomes** - a result we want to happen. The Scottish Social Housing Charter has outcomes that landlords should achieve for the benefit of their customers and communities.

**Registered Tenants Organisation (RTO)** – an independent group of tenants set up to primarily represent tenants' housing and related interests. If a group registers as an RTO with their landlord, this supports the groups' rights to information and consultation.

**RTO Register** – means a list of tenant organisations maintained by the Association.

**Scottish Housing Regulator** – The SHR regulates registered housing association landlords' and protects the interests of current and future tenants and other customers monitoring performance and financial probity of social landlords.

**Self-Assessment** – assessment of the Association's performance, which is used to improve our performance & provided to the Scottish Housing Regulator.

**Scottish Social Housing Charter**- the Government's standards that we must comply with and against which the Regulator monitors us. The charter was set after extensive consultation with tenants of housing associations and aims to reflect their key concerns.

**Tenant Participation Advisory Service (TPAS)** – a national tenant and landlord participation advisory service promoting good practice in tenant participation throughout Scotland.

**Tenant scrutiny** – a landlord involving tenants (and other customers) by giving them formal opportunities to analyse and challenge their performance and decision-making. The aim is to improve organisational performance. The Three Principles for Effective Scrutiny are:

Independence – scrutiny activities should be separate from governance, management and mainstream tenant participation structures, but have a formal recognised status with support from the organisation at the outset.

Formality – scrutiny activities should include clear roles, remit, terms of reference and lines of reporting for those taking part.

Power – tenants and other customers involved in scrutiny activities should be able to examine services and Standards, and make recommendations for service improvements. Landlords should respond to this by agreeing which measures can be implemented and, where they cannot be implemented, explaining fully why not and the quality and standard of services that they provide for their tenants.

## **Introduction**

This strategy document is Oak Tree Housing Association's Customer Engagement Strategy for 2021-2024. We have developed this strategy and will measure our success in partnership with our customers.

Our strategy aims to support and encourage customer engagement by providing an effective framework for involving our customers in shaping our direction and services. The framework will give us a range of tools to allow our customers to engage with us in different ways.

We accept that we need to understand our customers to be able to make sure we can be responsive to their needs.

We recognise our on-going legal responsibilities under the Housing (Scotland) Act 2001 in relation to tenant participation. The main focus of the strategy however, is to ensure customer engagement in delivering and monitoring our performance in relation to the Scottish Social Housing Charter.

## **Section 1: Background**

This Customer Engagement Strategy sets out the framework for how the Oak Tree Group will work with its customers over the next three years to ensure they can influence decisions about their homes and the neighbourhoods they live in.

This Strategy provides information on:

- the range of ways for customers to become involved
- the support and resources available for engagement
- how to register as a Registered Tenants Organisation
- how the strategy will be measured, monitored and reviewed

In the development of this strategy, we consulted widely with groups & individuals and continue to involve our customers in measuring our progress.

## Section 2: Aims of Customer Engagement Strategy

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.

✓ **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 & self-assessment 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 has to 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.

✓ **Be subject to review**

The Customer Engagement Strategy as a whole will be reviewed every three years.

### **Section 3: Understanding our Customers**

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. In order to involve, empower and include more customers in the management of their homes, we need to identify ways to widen access and engagement with customers in ways that suits them and to remove any barriers that get in the way.

We recognise our different customers will have different requirements and interests so that 'one size fits all' engagement is not appropriate.

We will develop & use 'customer insight' to better understand the views and experiences of customers to make improvements to the service where required. In practical terms, customer insight entails:

- The use of information about customers to better understand their needs, wants, expectations and experiences. This can be on an individual or a community level.
- The active application of this understanding in the design and delivery of services that better meet customers' needs

In 2018, we asked an independent researcher to carry out a tenant satisfaction survey and census to give us some customer insight as a starting point. We will continue to do this every three years. The survey provides up to date information about as many of our customers as possible - who is living in the house, any language or communication preferences, ethnic origin and disabilities. This is used to identify barriers to engagement and help us to take action to remove them. It also gives us direct information on how services were being received. Our tenants' main areas of concern and interest are identified. Different methods of engagement are reviewed.

We will continue to develop our customer insight to:

- ensure our information on customers is kept up to date by regular review
- use individual contact with customers to ask about any changes when they contact us
- use service reviews, independent surveys and other tools such as mystery shopping as research tools to better understand views and experiences of customers
- use the information from complaints as a tool to challenge our understanding of what customers want.

#### **Section 4: Our Standards for Consultation**

We will consult and engage with our customers on the following:

- Any significant changes to policy and service standards affecting our main services i.e. rent and service charges, repairs and maintenance service, estate management, anti-social behaviour or other changes that have a significant impact
- Changes to the agreements that we have with customers
- Planned or cyclical works programmes
- Procurement of the most significant services & contractors
- Changes to the Customer Engagement Strategy
- Changes to our Customer Care Policy & standards including our code of conduct for staff, contractors and customers

- Any local issues that may affect tenants and residents
- Performance monitoring – setting standards and reviewing performance against the standards
- Measuring performance against the standards and outcomes in the Scottish Social Housing Charter including the annual return on the Charter (ARC) and the programme of self-assessment

From time to time, changes are required due to changes in the law or guidance affecting our services. Where we have no discretion, we will not consult on the changes themselves, but will provide information to customers affected and we may consult on when, or how, the changes are implemented.

We recognise that there is a need to have different levels of resources available for different types of customer. The timescale for any consultation and the resources available will also reflect the complexity of the policy or service issue being reviewed

When consulting with customers we will strive to meet the minimum standards set out below:

- We will explain clearly the detail of the thinking behind the possible change, offer options for change and how each change would impact on individuals
- Notify of timescales for comments to be returned to the Association
- Provide information on how and when feedback will be given on the consultation
- Provide access to notes of any meetings
- Give details of which staff are dealing with the consultation and how to get in contact with them
- Give details of how, when and by whom final decisions will be taken
- How to express any dissatisfaction with any stage of the consultation process

### **Information and communication**

It is vitally important that communication flows both ways between us and our customers. Our customers need accurate and accessible information if they are to make informed choices. The Association is committed to ensuring equal access to our services and to ensuring that we do not unfairly discriminate against our customers. Our Equal Opportunities and Diversity Policy, which outlines how we do this, is published on our website and is available from the Association on request.

The Association is committed to ensuring the provision of information that best suits the customer:

- Written communication will be provided in Plain English.
- 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 take into account 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 particular 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.

Each year in March, we will draft a calendar for engagement activities across all services. This will be subject to consultation. It will tie in with policy and strategic changes due on the year as well as our annual activities such as drafting our assurance statement.

Forms of communication will include:

- Letters sent out individually
- Quarterly or ad hoc newsletters
- Questionnaires & surveys by post or email or text or via our customer portal
- Telephone surveys
- Meetings with customers
- Events
- Use of website & social media
- Tenants Handbook
- Information leaflets
- Mailshots
- RTOs or tenant groups meetings

## **Section 5: Toolkit for Engagement**

This strategy aims to provide a range of ways customers may engage with us to shape and review our services. These activities can only be successful if customers continue to wish to use them and we can resource them. Different approaches are suitable for different types of situations and to respond to different customers' needs and desire to get involved.

The list below identifies some of the main ways we will consult and engage in the period of the strategy. This list has been developed based on feedback from our customers on what we jointly think is effective and practical. Other approaches may be tested and added from time to time.

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 2 to 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.

**E-Consultation Register & Feedback via Social Media** – this register is a list of tenants who have told us that they would like to be consulted by email on policies and service areas that are of interest to them. This will normally be done for straightforward issues or where a quick response to gauge opinion is required. We will also post information and ask for feedback via social media including Facebook & Twitter.

**On-going Service Satisfaction Surveys and Questionnaires** – We use a range of surveys to measure satisfaction levels with our main on-going services. We will often offer a prize draw to encourage a response which can be up to the value of £50 in gift vouchers. We may carry surveys out by telephone for some areas where more detailed discussions are required to a smaller number of people.

**Service Review Groups** – When there is a service or policy review, we will hold either a single meeting or a number of meetings hosted by a member of staff to discuss key issues in detail. These groups 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.

**Tenants' Conferences & Public Events** – Events may be held to promote a service, give information out, to consult on a major issue or for social/community reasons. We also attend events held by other organisations such as Community Gala's, service launch events and public information 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.

**Estate Inspections** – tenants and local residents can meet with staff from the Association 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.

**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 up 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.

**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 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.

**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 quarterly.

### **Areas for Development**

These are activities we are keen to develop if we can secure interest & commitment from our customers.

**Mystery Shopping** – Mystery shopping involves working with customers to track their customer experience to fully test the service that they receive. The mystery shopper records their contact experience and gives their views on how their query was handled. This information is gathered by each mystery shopper and is collated, allowing us to identify training issues or any areas for improvement in our service. The process can often work best when managed by an independent group or person.

**Tenant Led Inspections** – We are interested in working with tenants to develop tenant led inspections. This involves a thorough training and planning process before trained inspectors come in to our offices to inspect aspects of our service delivery. Their assessment will include making recommendations to the landlord on how to improve the service. Normally, this is done in larger organisations or on a reciprocal basis between the tenants and landlords of two organisations so that the inspectors can be impartial and independent. This approach takes time and commitment from the tenants and the landlord to develop, but can deliver detailed information on how a service works in practice.

If our engagement identifies people who wish to work with us to develop tenant led inspections, we will provide the resources to train and equip the customers to take part.

### **Accreditation**

Accreditation is available from TPAS as a robust and structured process for assessing how well organisations involve tenants and residents. The accreditation is based on competencies and organisations that successfully complete the criteria will qualify for an Accreditation mark for 3 years.

Accreditation will be awarded at Bronze, Silver and Gold levels

The accreditations are validated by an independent panel of trained volunteers. TPAS accreditation encompasses a full spectrum of tenant participation activities:

- Legal and regulatory compliance
- Effective local information delivery
- Gathering feedback and using compliments and complaints

- Formal and informal TP strategies and structures
- Support for tenants, others service users, staff, and governing body members to participate
- Reporting and investigating performance to maximise value for money and service delivery

During the strategy period, accreditation will be investigated further as this may be an additional avenue to boost our engagement activities.

## **Section 6: Performance Review**

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.

The Customer Engagement Action Plan and calendar for engagement will be agreed annually. We will report on our progress and performance against the Action Plan to all our customers in our newsletter annually as well as in committee reports.

We will review the success of our engagement in general using feedback from our Independent Tenants' Satisfaction Survey.

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 7: Resources and Training**

The Association does not directly employ specialist staff to carry out 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.

We will work with partners to build the capacity for engagement to assist with tenant engagement and scrutiny where this is appropriate.

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; incentive payment costs (e.g. for participating in, for example, mystery shopping), cost of independent satisfaction survey, various satisfaction surveys prize draws (up to £50) and other administrative costs.

We support the setting up, development and continued operation of Registered Tenants Organisations by providing financial support to assist with the costs of setting up and running a group. Our policy on this is available separately. However, we recognise that interest in formal groups is waning over Scotland.

We recognise the need to provide training for both staff and tenants involved in tenant participation. Resources will be provided for staff, individual tenants and tenant groups who wish to further their knowledge and to encourage participation by offering training through the Association or other organisations.

Appropriate training will be provided to members on the Management Committee to ensure that they have the necessary information, skills and confidence to make informed choices and contribute effectively.

### **Section 8 Policy Review**

The strategy will be subject to review every 3 years.