

CUSTOMER INVOLVEMENT STRATEGY

2009-2011

***Working in partnership with customers to
provide places where people
want to live***

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1. Introduction

1.1 This Customer Involvement Strategy sets out Places for People's commitment to involving customers in shaping and improving the services they receive.

1.2 The vision of Places for People is **to create neighbourhoods of choice**; and one of its five key aims is **to meet our customers' expectations and deliver excellent operational performance**.

1.3 The vision is supported by a number of core values, including the following which relate directly to this strategy:

Making places and people matter by:

- Listening to and involving customers in all that we do
- Always putting customers, stakeholders and staff at the heart of what we do
- Demonstrating quality of service and respect for individuals
- Making a difference through the creation of neighbourhoods and communities

1.4 This strategy sets out how the organisation will help achieve its overall vision by delivering the **strategic aims** set out at Section 4 below.

2. Background and Definitions

2.1 This strategy has been developed to provide a framework for delivering the short and medium term priorities for the organisation, in order for it to be as effective as possible in involving customers in shaping services.

2.2 The term customer is generic. It embraces anyone accessing the organisation's services, including tenants, leaseholders, applicants, service users, clients and other residents living in neighbourhoods in which the organisation is operating.

2.3 The definition of involvement has been deliberately broadened to include any of the ways in which customers can actively share their views, opinions, experiences and priorities to influence decision making within the organisation.

2.4 The organisation's Customer Access Strategy, Complaints Policy, Equality Scheme and Policy and Investing in Neighbourhoods set out the approach in these areas. Although there is inevitably some cross-over, this strategy is not intended to cover any of these functions.

2.5 This strategy was produced following consultation with customers, staff from across the Places for People Group and external stakeholders.

3. Drivers for Change

3.1 Customer involvement has the potential to deliver a number of benefits to the organisation, both directly and indirectly. These include:

- Increasing customer satisfaction with services
- Continuously improving performance
- Increasing accountability

- Enhancing ability to shape future services to meet the needs and preferences of customers
 - More successful and sustainable communities, that are better integrated and engaged
 - Greater awareness and understanding among customers of issues that affect them
 - Customers with improved skills, confidence and prospects
- 3.2 The 2007 Cave report on Social Housing has led to a greater emphasis on customer influence within the sector. This has been achieved through the introduction of the Housing and Regeneration Act (2008), and the subsequent creation of the Tenant Services Authority (TSA).
- 3.3 Giving customers greater influence over the services they receive is one of the key elements of the TSA's new regulatory framework. In 'A new regulatory framework for social housing in England', the TSA proposes a number of national standards, the first of which is the Tenant involvement and empowerment standard. One of the required outcomes under the standard is that 'Registered providers will offer all tenants opportunities to be involved in the management of their housing'¹, including allowing customers to influence policy and service delivery, and to scrutinise performance.
- 3.4 The standard is outcome-driven, and is not prescriptive about how involvement should take place. However, there are a number of specific requirements listed within the Standard, including the need to consult with customers about the possible introduction of local standards where they wish it in the areas of service indicated by the TSA.
- 3.5 This strategy has been developed to reflect the new Standard, and the organisation's approach to involvement will continue to be reviewed against TSA requirements and guidance.
- 3.6 The Audit Commission inspection regime is also placing an increasing emphasis on customer involvement. As part of the inspection process, organisations need to be able to demonstrate how they can evidence their performance in this area, both specifically as determined through Key Line of Enquiry 5 – Resident Involvement; and across all services as a cross-cutting function.
- 3.7 Providers of support schemes funded by Supporting People (SP), such as those delivered by Places for People Individual Support Limited, are subject to regulation by SP through the Quality Assessment Framework (QAF), which sets out clear expectations regarding the involvement of customers of those schemes.

¹ 'A new regulatory framework for social housing in England (Summary)', *Tenant Service Authority*, November 2009.

4. Strategic Aims

- 4.1 Places for People recognises the critical importance and value of customer involvement in decision making, whether through formal or informal means. The organisation is developing a culture that embraces customer challenge and actively seeks opportunities to increase customer influence within all aspects of its operation.
- 4.2 The aims of the Customer Involvement Strategy are to:
- 1. Provide a wide variety of involvement opportunities, so that customers can get involved in the ways and at the levels that suit them.**
 - 2. Keep customers effectively informed about decisions, plans and changes that affect them; and opportunities for them to shape services.**
 - 3. Maximise the potential for customers to influence services by involving them meaningfully in all areas and at all stages and all levels of decision making.**
 - 4. Build customer and community capacity to influence service delivery**
 - 5. Achieve high levels of customer satisfaction and deliver value for money in involvement activities.**

5. Existing Involvement Structure

- 5.1 The mechanisms for involving customers at Places for People are reviewed continuously to ensure they are as effective as possible. The organisation offers a menu of involvement to provide customers with choice about how they become involved. The different levels and activities are summarised below, and a diagram of the existing structure is at Appendix 1.

Information

- Twice-yearly newsletter to all tenants (including You Said, We Did section)
- Annual performance report
- Local and estate-based newsletters
- Website
- Leaflets, flyers, posters and letters

Feedback and Consultation

- Service-specific and STATUS surveys
- Comments, complaints and compliments
- Estate walkabouts
- Voice Group
- Focus groups
- Community Involvement Week
- Post-completion surveys of new developments
- Neighbourhood focussed customer perception surveys
- Place-making events relating to large scale development / redevelopment

- Local green space improvements via the Big Lottery Fund Green Spaces programme

Influencing Services

- National Customers' Forum
- Customer Experience Panel
- Regional Customers' Panels
- Local Tenants' and Residents' Groups (including one Tenant Management Organisation)
- Individual scheme-based groups
- Customer Editorial Panel
- Futures Group
- Customer Inspectors
- Mystery Shoppers
- Homeowners' Forum
- Individual Support Focus Group
- Involvement in Neighbourhood Planning and area based plans
- Engagement in large scale regeneration activity (e.g. Green Spaces programme) and local regeneration projects
- Involvement in asset management decisions (e.g. contractor selection, procurement)

Governance

- Assurance & Regulation Board membership (4 customer positions)

6. Priorities for Action

6.1 This section evaluates the organisation's position under each of the strategy's aims and identifies the priorities for action required to deliver that aim. A Strategy Action Plan sets out how this will be achieved in more detail.

6.2 **Aim 1: Provide a wide variety of involvement opportunities, so that customers can get involved in the ways and at the levels that suit them.**

Where we are

- Customers are able to become involved using the menu of opportunities set out at Section 5 above.
- The organisation provides a wide range of support to enable all customers to participate in involvement, including travel and childcare expenses, translation of documents and hearing loops.
- The Individual Support Focus Group (for customers of schemes provided by Individual Support Limited, including older persons' schemes) and the Homeowners' Forum (for customers who own or part-own their homes) allow these groups of tenants to address issues affecting them.
- The organisation has worked with particular groups of young people to gather their views.

Priorities for Action

- Use profile data to identify which groups are under-represented and target involvement activities accordingly.
- Establish a customer task force to investigate particular barriers faced by different customer groups and formulate actions to overcome them.
- Develop a framework specifically for involving younger customers across the organisation.
- Review the expenses policy to make sure it sets out clearly what support customers can expect; and publicise it to all customers.
- Explore further opportunities for involving customers in a variety of ways, including through use of electronic media.
- Seek approaches that help to increase the involvement of customers with vulnerabilities and/or other complex factors affecting access, such as customers: with learning difficulties and other mental health issues; with chaotic lifestyles; in short-term support schemes; and those supported by a managing agent.
- Make sure the remit of individual customer involvement groups is designed to be inclusive of the needs and aspirations of the full range of Places for People customers.
- Make sure that the range and nature of involvement opportunities offered makes involvement accessible and meaningful for the full range of Places for People customers, as defined at 2.2 above.
- Publish a calendar of involvement events.

6.3 Aim 2: Keep customers effectively informed about decisions, plans and changes that affect them; and opportunities for them to shape services.

Where we are

- Annual performance report distributed to all tenants.
- Key information affecting customers disseminated through Let's Talk newsletter and website.
- Involvement opportunities are promoted through the national and local newsletters, and the Customer Involvement leaflet, and You Said We Did column celebrates successful outcome from involvement.

Priorities for Action

- Review current reporting mechanisms with customers, including Let's Talk, to make sure they continue to meet their needs in terms of content and presentation.
- Agree mechanism to disseminate Assurance & Regulation Board decisions relating to customer-facing services more widely to customers.
- Establish effective mechanism for representatives of Area Groups to disseminate information from NCEP and NCF to their groups and vice versa.
- Develop more locally focused approaches to communication in areas where we have a large concentration of homes.

6.4 Aim 3: Maximise the potential for customers to influence services by involving them meaningfully in all areas and at all stages and all levels of decision making.

Where we are

- Customers are involved throughout major procurement decisions for services affecting them, including the major repairs contract (via the National Customer Forum).
- Customer-facing policies and strategies are developed in conjunction with the National Customer Forum.
- Feedback about services is gathered regionally (via Regional Customer Experience Panels) and nationally (via the National Customer Experience Panel) and used to shape those services in the future.
- Mystery Shoppers recruited to test services and identify improvement opportunities.
- Customer Inspectors recruited to review services and make recommendations for improvements.
- The Futures Group helps the organisation respond to the changing needs and preferences of customers when determining the shape of services into the future.
- The Editorial Panel reviews customer-facing literature, including the Let's Talk newsletter, to make sure it meets customers' needs.
- Customer feedback is obtained on newly completed homes and fed into post completion reviews.
- Communities and potential customers are engaged in the shaping and delivery of regeneration projects.
- Customers influence governance through membership of the Assurance & Regulation Board.

Priorities for Action

- Establish clear guidelines so that customers and staff can readily understand what level of customer influence is currently in effect and what level is sought in the longer term, within different areas of the business. This needs to be determined through an evaluation by each area of the risks, benefits and value for money of further or different involvement, with the ultimate aim of seeking the maximum influence this approach allows, with measures taken to manage the concomitant risk.
- Establish specific Customer Action Groups aligned to each core service (e.g. Income Management, Repairs, ASB Response) to monitor performance and improve services in those areas. The precise remit of the CAGs needs to be determined in conjunction with customers; however, it will include influence over strategic direction (the shape of future service), budget setting and procurement within the relevant services, as well as performance, satisfaction and service quality.
- Roll out the national Mystery Shopper programme to establish a consistent and comprehensive service-testing and scrutinising regime.

- Build on the existing Customer Inspector project to create a team that is able to scrutinise services by carrying out in-depth reviews of specific services to a professional standard, producing reports and recommendations, and monitoring progress against them; and by contributing to the organisation's service review programme.
- Establish a Scrutiny Panel comprising members of the Mystery Shopping and Customer Inspector Team.
- Embed customer involvement into the organisation's procurement policy, to make sure customers are involved as effectively as possible in any procurement decisions affecting them.
- Train and empower customers to allow them to be consistently involved in the recruitment of customer-facing staff.
- Embed customer involvement more fully into the organisation's development processes, to make sure customers are as involved as effectively as possible in any development affecting them.
- Improve links between local and scheme based customer groups and issues affecting customers generally by actively seeking the views of local groups when addressing global issues, and by sharing the experiences and successes of local groups to influence overall service delivery and help all groups become more consistently effective.
- Consult with customers about the way they are represented within the governance process and agree actions accordingly.

6.5 Aim 4: Build customer and community capacity to influence service delivery

Where we are

- A variety of training is provided to customers to allow them to be involved more effectively.
- Estate Walkabouts allow customers to identify improvements to neighbourhoods.
- Specific customer groups influence service delivery at local and individual scheme level.
- Local fun days and Community Involvement Week allow staff to engage with wider communities at different levels and exchange feedback and information on an informal basis.
- Through the Neighbourhood Planning process, there is a framework for involving affected customers in decision making at a neighbourhood level.
- Engagement of customers and the wider community in the shaping and delivery of regeneration projects.

Priorities for Action

- Develop a training plan which sets out the range and overall aims of customer training.
- Establish a dedicated budget for customer training.
- Introduce training log and evaluation for all customer training activities

- Introduce a system of skills auditing to determine the training and mentoring needs of customer Board Members and involved customers, particularly those in appointed roles; and provide relevant training to address any gaps.
- Develop succession plans for customer Board membership.
- Review local involvement mechanisms, and the links between local, regional and national involvement groups, to make sure they are as effective as possible.
- Set clearer aims for community activities such as fun days and community involvement week; and make sure outcomes are evaluated effectively and acted on where appropriate.
- Devolve neighbourhood improvement budgets to Area Customer Experience Panels and establish a process overseen by them, whereby neighbourhoods are able to bid for cash to support local initiatives.
- Further integrate engagement undertaken through Neighbourhood Planning into shaping of services more generally; and introduce appropriate alternatives in areas not covered by Neighbourhood Plans.
- Develop a framework for promoting and supporting the participation of customers in wider community projects, such as employment, health, skills training, cohesion and sustainability initiatives to allow them to increase their local influence and develop transferable skills; and use it as a springboard for involvement with Places for People.
- Consult with customers about the possibility of introducing locally tailored approaches to service delivery where they wish it, and introduce local standards where appropriate, in line with TSA requirements.

6.6 Aim 5: Achieve high customer satisfaction and value for money in involvement activities

Where we are

- 6-monthly impact assessments are used to evaluate the cost effectiveness of involvement activities.
- STATUS and other feedback is used to gauge the level of satisfaction with involvement.
- Neighbourhood focused customer perception surveys.

Priorities for Action

- Formulate action plans to address any weaknesses identified through Impact Assessments, STATUS survey or other customer feedback.
- Benchmark the organisation's costs and performance in Customer Involvement against others in the sector to identify improvement opportunities.
- Explore opportunities to share positive practice with high-performing peers to help improve services.
- Seek out partnership opportunities, for example to share the cost of staging involvement activities in mixed-tenure areas; or of providing customer training.
- Actively pursue opportunities to improve the efficiency of involvement activities, including possible outsourcing of particular involvement functions.

- Introduce an incentive scheme for customers who identify value for money improvements to service.
- Establish a framework for involving customers in evaluating the Value for Money of involvement and other services on a regional and national level.

7. Service Standards

7.1 The organisation has set challenging service standards following consultation with customers. The following are those relating to Customer Involvement:

- Carry out annual reviews of all constituted customer groups, to identify and address priorities for making sure each group continues to be effective.
- Provide a range of ways for customers to get involved at a level that suits them
- Consult customers on changes that affect the management of their homes or services we provide
- Cover all reasonable out of pocket expenses for customers who take part in Places for People activities such as child care, adult care, subsistence, transport and room hire.
- Aim to ensure that our involvement profile is representative of our diverse customer base, and carry out events to target harder to engage groups where appropriate.
- Maintain a team of customer inspectors, who will inspect at least two service areas each year, according to an agreed schedule; and publish the outcomes to customers.
- Clearly communicate the outcomes of involvement activities, so that customers are aware of how they have influenced service improvements.
- Provide opportunities for customers to develop their skills, knowledge and confidence
- Evaluate the impact of customer involvement with customers at least twice a year, publish the results and deliver against any actions.

8. Performance Indicators

8.1 The organisation's customer involvement performance will be measured against the following performance indicators:

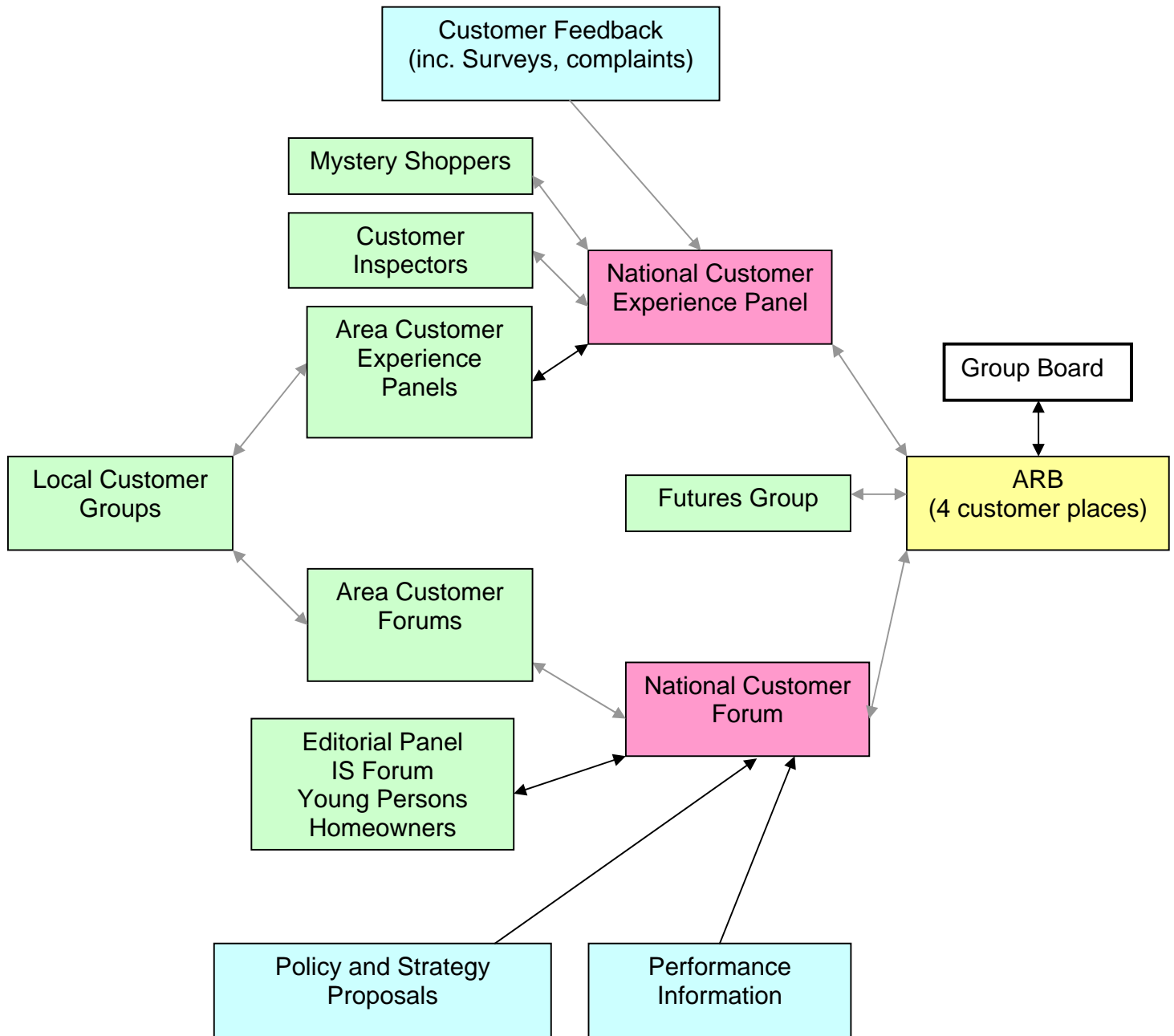
Indicator	Baseline Nov 2009	Target 2010/11
Number of formally involved customers (National & regional groups: excludes local Tenants' and Residents' Associations and other local groups)	213	275
Impact Score from outcomes of activities	n/a	tbc
% of Scrutiny Panel Actions delivered to timescale	n/a	100%

- 8.2 The organisation will also monitor the cost per household of the overall service and the value for money of individual involvement activities through benchmarking and the impact Assessment.
- 8.3 The most recent full STATUS result was 53% of customers satisfied with opportunities for participating in decision making. The target for the next STATUS survey to be carried out in 2010 is at least 70% of customers satisfied that their views are taken into account.
- 8.4 Targets will be set where appropriate for increasing representation for particular customer groups where they are underrepresented in relation to the overall customer base.

9. Monitoring and Review

- 9.1 A Strategy Action Plan sets out in detail how each of the actions set out in Section 6 above will be completed.
- 9.2 The Strategy Action Plan, Performance Indicators and Value for Money of the service will be monitored quarterly by the National Customer Forum, Place Management Team and Assurance & Regulation Board.
- 9.3 The Customer Involvement Strategy will be reviewed at least annually by the Customer Involvement Manager, other colleagues and representative customers.
- 9.4 Six-monthly Impact Assessments will continue to be used to evaluate the effectiveness of involvement activities and inform the organisation's approach in the future. The impact of individual involvement activities will be collected on an ongoing basis to feed into this.
- 9.5 An Equality Impact Assessment has been carried out on the Strategy to ensure it is compliant with our overall aims and standards relating to Equality and Diversity.

Appendix 1: Involvement Structure Chart (Existing)



- Well established links
- Less established links

Appendix 2: Involvement Structure (Proposed)

