

HOUSING MANAGEMENT ADVISORY BOARD – 12 JULY 2023

Report of the Principal Officer – Customer Engagement & Older Peoples Services

PROGRESS ON DELIVERING THE 2022-2025 CUSTOMER ENGAGEMENT STRATEGY

1. PURPOSE OF REPORT

To present the board with an update on progress made of the actions identified in the 2022 -2025 customer engagement strategy.

2. ACTION REQUESTED

The board is invited to note and comment upon the action plan progress.

3. BACKGROUND

3.1 In March 2022 the customer engagement strategy for 2022 – 2025 was agreed with an action plan identifying the key actions required to deliver the strategy (Appendix A).

3.2 Customer engagement is about how we ensure that our tenants and leaseholders can challenge and give their views on the housing services we deliver. It is how we inform and consult our customers about changes and how we get feedback from customers about our housing service.

3.3 Our customer engagement strategy aims to ensure we will meet our regulatory requirements by providing a range of opportunities for customers to influence and be involved in decision-making about our housing related services, developing our policies and scrutinising our performance.

3.4 Our strategy has the following priorities:

- To be more accountable for the services we deliver;
- To use customer feedback to improve our housing services and increase value for money;
- To embed customer engagement in all our services;
- To make it easier for our customers to engage us in ways and on issues that interest them.

The action plan (appendix A) identifies the actions needed to achieve each of these four priorities.

4. EXECUTIVE SUMMARY

| Priority | No. actions | % actions completed | % actions in progress or not yet scheduled for completion | % actions out of target |
|-----------------|--------------------|----------------------------|--|--------------------------------|
| 1 | 9 | 78% | 22% | 0% |
| 2 | 7 | 43% | 57% | 0% |
| 3 | 5 | 40% | 60% | 0% |
| 4 | 3 | 100% | 0% | 0% |

5. DETAILS OF PROGRESS ON THE ACTION PLAN

5.1 In meeting the priorities identified in the strategy, the following actions have been completed:

- The twice-yearly programme of meetings at our sheltered have recommenced at all our sheltered courts. In 2022/23 these meetings have so far been attended by 147 tenants. 234 queries were raised and 210 have been resolved;
- The Senior Citizens' Forum (SCF) meetings have recommenced and are again held quarterly. Around 20 representatives attend each meeting. The representatives have monitored the performance of the warden service and voted on eligible tenants bids. They are also involved in the development of a potential handyman service for sheltered housing. Most courts consulted were in favour in the service;
- The team has established a good working relationship with the council's communications team. Regular posts are made on social media and in council publications promoting activities and providing feedback following those activities;
- The annual tenant garden competition was held in the summer of 2022. There were 32 entrants in six categories. A presentation event was held in the autumn. Entries are being encouraged for this year's competition and, based on tenant feedback, extra categories have been added;
- Improvements have been made to the customer engagement web pages. There is now a calendar of engagement activities on the page and tenants can apply for grant funding via online application forms;

- In 2022 we carried out four estate walks with officers from landlord services and other stakeholders. The walks were in Birstall, Thorpe Acre, Warwick Way and Mountsorrel and 17 tenants joined the walks who attended the drop in sessions held after the walks. 46 matters for consideration or action were identified during the walks. Estate walks are continuing this year and have re-established themselves as a regular engagement activity once more;
- The first tenant networking event since the pandemic took place on 8 June 2023. Although the event had to be scaled back because of a fire affecting the town hall, officers from Landlord Services and other partner organisations attended. 57 tenants attended the event;
- There are various amounts of grant funding available to assist tenants in improving their communities and well-being. EEM is a procurement framework which gives a grant to customers who use their services. In 2022/23 we received £11,500. £7,000 of this grant was given to Age UK as part of the council's support to residents faced with the effects of the current high inflation rate. The remainder of the fund was set aside to assist communities with IT equipment as part of the council's digital inclusion programme;
- The community initiatives fund provides assistance for groups to undertake community activities to reduce isolation and improve community spirit. In 2022/23, 23 grants were given totalling £5,057.50. Events such as boat trips, sheltered court parties with entertainment and food and meals out were undertaken and 382 tenants were able to benefit from being involved in these events;
- Tenant bids are grants given to improve the local community. In 2022/23 £10,954.73 was given for five projects. These projects include landscaping at Durham with a new greenhouse, a new community bench for Thorpe Acre, a patio area for Arnold Smith house and a new shed at Fielding Court;
- These grants and the projects and events they support are promoted in the tenant magazine, *Your Homes Matter*, to encourage other groups to apply for funding;
- A new *Have Your Say* leaflet has been produced to inform tenants of the opportunities available for them to provide feedback and be involved in developing the housing services we provide. The design has a new branding that is being replicated throughout all involvement literature;
- Updates on the progress against the strategy action plan are reported to the HMAB and CHRF and a report will be included in the annual report included in the autumn addition of *Your Homes Matter*. Information to support these reports will be gained by using specialist software called TP Tracker. All information on activities, such as attendance and cost, is

input into the software and reports can be produced to interrogate the value customer engagement activities bring;

- Articles on lessons learnt from complaints are included in articles for *Your Homes Matter*;
- The editorial panel is a group of tenants who assist us in ensuring our literature is user friendly. They have agreed a style for all our documents to ensure the documents are professional-looking and identifiable as landlord services documents. Last year they assisted in the production of the new tenancy agreement and the repairs handbook. The panel also meet to comment on and suggest ideas for articles for *Your Homes Matter*;
- Landlord Services provide a payable (through a service charge) communal cleaning service for tenants and leaseholders living in blocks of flats. Tenant cleaning inspectors assist in providing feedback on the service and ensuring the agreed service standard is met. We have nine tenant cleaning inspectors and who have recently undergone additional training to assist them in the inspection process;
- The customer engagement team has attended the team meetings of all service areas in landlord services to explain the work of the team and identify areas where customer engagement would enhance the services provided.

5.2 As well as maintaining current activities the priorities for the next year will be

- Supporting delivery of the council's digital inclusion programme;
- producing a revised leaseholder handbook with the editorial panel;
- developing a mystery shopping panel;
- training and implementing a tenant scrutiny group;
- providing training to empower tenants to engage effectively in activities.

6. MONITORING AND REVIEW

The strategy and its action plan will be monitored by the HMAB and CHRF. The strategy will be reviewed and a new strategy produced in 2025. We propose providing a further update report of this nature to HMAB in a year's time, subject to members' agreement.

7. RECOMMENDATION

HMAB members are requested to note and comment upon the progress of the customer engagement strategy.

Sally Ramalho
Principal Officer – Customer Engagement & Older People’s Services

12 July 2023

Appendix A

Customer engagement strategy 2022-25 action plan

| Ref no. | Priority one: To make it easier for our customers to engage us in ways and on issues that interest them | | | | | | |
|---------|---|----------------|---|--|--|--|---|
| | Objective | Priority L/M/H | Milestones/How success will be measured | Progress | Lead | Original target date | Status |
| 1.1 | Recommence the sheltered courts' tenant meetings and Senior Citizens' Forum | H | <ul style="list-style-type: none"> Date of meetings set Representation from every court | All meetings now scheduled in for the year and under way | Principal officer/Customer engagement officers | March 2022 | Complete |
| 1.2 | Work with our communications team to ensure we use all methods of communication to reach a wider audience | H | Monitor hits on website and response to social media announcements | <p>Initial groundwork started with comms team</p> <p>CHRF article for YHM in this edition (summer '22).</p> <p>Grant forms can be completed online now</p> <p>Calendar of events is now on line. Social media is active; everything we do goes on social media sites. We'll do a big CE piece in</p> | Customer engagement officers | Well-established; so this action can be considered to have been fulfilled. Now 'business as usual' | In progress; three new people signed up |

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| | | | | YHM's autumn edition on activity and achievements | | | |
| 1.3 | Continue to hold the annual tenant garden competition | H | Measure number of entries | Judging week commencing 11 July scheduled. Presentation ceremony and mayor's presence booked; date set. | Customer engagement officers | July 2022 | Complete |
| 1.4 | Develop our website to include online applications for funding opportunities and a live calendar of engagement activities | H | Evidence of online forms completed | Funding process has been completed; calendar project is still outstanding. | Customer engagement officers | December 2022 | Complete |
| 1.5 | Introduce more informal engagement activities to engage our customers in their communities, such as estate action days, informal roadshows and short-term activities | H | <ul style="list-style-type: none"> Estate walks scheduled for 2023; Other activities/events to be conceived for 2024s | <p>Three dates have been scheduled for the summer of 2023 to do smaller networking events</p> <p>Events are booked in for the summer.</p> | Principal officer/Customer engagement officers | April 2023 | In progress |
| 1.6 | Improve relationships with customers and communities by promoting our community funding opportunities, such as tenant bids, community initiatives fund and EEM community donations. | M | <ul style="list-style-type: none"> Magazine articles in each addition of YHM, including "You said, we did" article. Report to CHRF & HMAB on funding for the year | This is now embedded in operational processes and so can be said to be complete as far as this action is concerned | Customer engagement officers | April 2023 | Complete |

| 1.7 | Recommence the annual tenant network event | M | Attendance numbers at event | Booked for 8 June 2023 | Customer engagement officers | August 2023 | Organisation complete |
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| 1.8 | Explore with our customers how they can provide feedback and access information using digital routes through their tablets, phones, or computers | M | Customer survey to identify preferred methods of contact and availability of devices and internet. | We are working with the council's digital inclusion project with the corporate transformation team | Customer engagement officers | April 2024 | Open |
| 1.9 | Review our "Have Your Say" leaflet to include all opportunities including an indication of time commitments and expected outcomes | H | Production of new leaflet | Complete: sent to print | Principal officer/Customer engagement officers | May 2024 | Completed |
| Priority two: To be more accountable for the services we deliver | | | | | | | |
| Ref no. | Objective | Priority L/M/H | Milestones/How success will be measured | Progress | Lead | Target date | Status |
| 2.1 | Promote the outcomes of customer engagement activity to all stakeholders emphasising the difference it has made | H | Report generated from TP Tracker for annual report | Need additional training for CE officers. Training has been done but time needs to be spent to finalise the report and impact assessment | Principal officer/Customer engagement officers | March 2023 & September 2023 | In progress |

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| | | | | Report for the YHM annual report will be included in the big piece we're doing about the activities of the team. TP Tracker is working well now | | | |
| 2.2 | Provide regular reports on complaints received and lessons learned | M | Article in YHM | | LSM | October 2022 | Completed |
| 2.3 | Work with our editorial panel to improve the design, content, and format of our literature | M | Copies of new materials produced | Complete and now embedded in normal operational processes | Customer engagement officers | March 2023 | Complete |
| 2.4 | Promote the outcomes of any grant-funded activities | H | Articles in <i>Your Homes Matter</i> | Complete and now embedded in normal operational processes | Customer engagement officers | April 2023 | Complete |
| 2.5 | Develop a training programme for tenants to empower them to hold us to account | M | Record of number of tenants attending training | Promoting this facility is continually made with tenants The new 'Have your say' leaflet will be a useful means to promote training for involved residents | Principal officer/Customer engagement officers | December 2024 | In progress |
| 2.6 | Develop and support a tenant-led scrutiny process to challenge our services and recommend improvements | M | <ul style="list-style-type: none"> Recruitment of scrutiny panel members Training of scrutiny panel members | | Customer engagement officers | June 2024 | Open |

| | | | <ul style="list-style-type: none"> Scrutiny report and suggested actions | | | | |
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| 2.7 | Take an annual report to the Charnwood Housing Residents Forum and the Housing Management Board to state the progress made on delivering the strategy. | | Reports taken to HMAB for July meeting and CHRF in August | | Principal officer | July 2023 and annually thereafter | In progress |
| Priority three: To be use customer feedback to improve our housing services and increase value for money | | | | | | | |
| Ref no. | Objective | Priority L/M/H | Milestones/asures of success | Progress | Lead | Target date | Status |
| 3.1 | Recruit and train communal cleaning inspectors | H | <ul style="list-style-type: none"> Article in YHM spring edition 2022 Recruitment and training of a minimum of twelve tenant inspectors | Recruited around 20 people; packs have been put together and training has been carried out | Customer engagement officers | December 2022 | Complete |
| 3.2 | Deliver the action plan ¹ produced based on resident feedback from our STAR survey. | H | <ul style="list-style-type: none"> All SMT to provide input in to 'You said, we did' article for YHM on | Work has been done to identify data from the raw data to establish any reasons for the | SMT | April 2023 | Complete |

¹ [HMAB - 23 March 22 - Item 5 - STAR Survey Report.pdf \(moderngov.co.uk\)](#)

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| | | | <p>changes to their service areas</p> <ul style="list-style-type: none"> Action plan delivered. | <p>apparent anomalies that emerged from the survey. Nothing was found and so there is limited scope for further action on this.</p> | | | |
| 3.3 | <p>Complete the impact assessment stage of the grant-funded processes for tenant bids, EEM donations and community initiative funds to ensure they deliver value for money</p> | M | <p>Impact assessments to be completed following each grant or bid completed</p> | <p>The assessments were originally expected to be completed by the end of June 2023; however, it is more realistic to have a target date of October, which is more aligned with the grant-funding year</p> | <p>Customer engagement officers</p> | <p>October 2023</p> | <p>In progress</p> |
| 3.4 | <p>Use our TP Tracker software to produce reports on the cost and outcomes of customer engagement to ensure we are providing value for money</p> | M | <p>Feedback report to be included in annual report</p> | <p>All data from activities in 2022 to date has been input and is now being kept up to date.</p> <p>All information is in the report and this will be included in the annual report edition of YHM in the autumn</p> | <p>Customer engagement officers</p> | <p>October 2023</p> | <p>In progress</p> |
| 3.5 | <p>Introduce a mystery shopping process to gather feedback and make</p> | M | <ul style="list-style-type: none"> Training of mystery shoppers | | <p>Customer engagement officers</p> | <p>September 2024</p> | <p>Open</p> |

| | recommendations for areas for improvement. | | <ul style="list-style-type: none"> Mystery shopping feedback report and suggested improvements | | | | |
|--|--|----------------|---|---|--|---------------------|-------------------------|
| Priority four: To embed customer engagement in all our services | | | | | | | |
| Ref no. | Objective | Priority L/M/H | Milestones/measures of success | Progress | Lead | Target date | Status |
| 4.1 | Use the tenant bids budget effectively and in accordance with the new revised procedures | H | Report to HMAB & CHRF, including impact assessments | <p>In progress. Spend to Q1 to be updated. CEOs are working on the Castledine St project and furniture at Riversdale Court.</p> <p>Done all bids for this year and we have approximately £12,000 left; so that is a great improvement</p> | Principal officer/Customer engagement officers | Each financial year | Completed for this year |
| 4.2 | Use EEMs' community donation fund in accordance with the new revised procedures | H | Report to HMAB & CHRF, including impact assessments | We have £11,500 of which £7,00 has gone to Age UK and we have £4,00 for the digital inclusion project | Principal officer/Customer engagement officers | Each financial year | Completed for this year |
| 4.3 | Customer engagement officers to attend team | M | Evidence of attendance at team meetings; | The majority of teams have had CE | Principal officer/Customer | March 2023 | Completed |

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| | meetings regularly to facilitate cross-team working across all landlord services and support teams to promote engagement in all our services | | reports to landlord services' senior management team. | attendance. This will now be normal operational activity. All team meetings have been attended. | engagement officers | | |
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Glossary

CHRF - Charnwood Housing Residents' Forum

EEM - a framework organisation used by the council to procure contracts

HMAB - Housing Management Advisory Board

SMT - Senior management team (managers from all areas of Landlord Services)

STAR survey - a nationally-recognised survey to gather customer satisfaction feedback from tenants