

# Margaret Connor

Customer Involvement & Services  
Manager, Salix Homes

# Barbara Harper

Chair of the Customer Senate,  
Salix Homes

2011  
events

**1<sup>st</sup> Annual Tenant Panel Conference**

Monday, 28<sup>th</sup> November 2011

York Racecourse

Quality  
of Life



# Recruitment and Training Panel Members

**Barbara Harper Chair of Customer**

**Margaret Connor Customer Involvement and Service Manager**



Outstanding achievement in housing in the UK

Outstanding achievement in housing in England

Involving and empowering communities

# Recruitment and Training

The aim of this workshop is to give an insight into:

- How we identified skills gaps and recruited new members
- How we identified training needs, using skills gaps
- How we deliver individual and group training and build confidence
- How we resource and support our panel



# Background

- Two recruitment drives
  - Full Senate
  - 5 Senators
- Different approaches
  - Letter from Chief Executive
  - Flyer
- Different selection processes
  - Formal interview
  - Speed dating



# Identifying skills required and gaps

- Detailed person specification
  - Customers need to be involved
    - Terms and reference for the panel
    - The role of individuals and collective panel
    - What would make a perfect panel member



# Person Spec of Senator

- focussed on the best interest of Salix customers
- go beyond own interests
- communicator
- listener
- respects others and their views
- recognises diversity and equal opportunities
- has high standards of behaviour, probity & integrity
- can work as part of a team
- can apply skills & knowledge
- happy to share skills & knowledge to help other Senators



# Person Spec of Senator

- enthusiastic
- conscientious
- participate in training & personal development
- prepare for and regularly attend Customer Senate meetings
- make appropriate contributions to meetings
  - a Customer of Salix Homes



# Group Collective Competencies

- **Team Work** – works in harmony, collaboratively, respect others views, seek consensus and accept compromise where appropriate.
- **Communication** – shares ideas, use appropriate language, listen, feedback and report.
- **Accountability** – operate with high degree of openness, publish plans and reports, reflect and respond to views/aspirations/priorities of the wider customer body.
- **Behaviour** – Respect others, be non-judgemental, non-aggressive and non-confrontational and support collective judgements.
- **Knowledge** – of scrutiny processes, of Salix Homes services, structures, objectives, standards, governance arrangements, policies and procedures. Of external standards, expectations, and best practice.
- **Skills** – ability to scrutinise, analyse, interpret, question, challenge and negotiate.
- **Decision making** – arrive at judgements that are based on strong evidence and are balanced, reasonable and proportionate. Respect the role of the Salix Board.
- **Management** – ability to plan activities, review progress, monitor performance and respond to exceptions.
- **Value diversity** – Promote equal opportunities.





# How do you identify the gaps?

- Self awareness of panel
  - Diversity
  - representative
- Qualities of departing members
- Appraisal process
  - Regular 1:1s
  - Annual appraisal
  - Individual development plans
- Review of projects
  - What could have helped



# How to fill the gaps

- Recruitment Plan
  - Advert
  - Positive action
- Communication Plan
  - Customers; Board; staff
  - Website; team briefs; events
- Organisational buy in
  - Making best use of colleagues



# Recruitment

- Know your audience
  - Application; expression or approach
- How do you get the best out of applicants
  - Formal or informal?
  - Interview or conversation?
  - Ask the right questions
- Know what you are looking for
  - How do you expect them to answer
  - Scoring matrix



# Our experience

- First advert
- Advert – letter from Chief Exec
- 60+ applicants
- Formal interview
- Appointed top applicant in each neighbourhood
- Nominations form panels
- Second advert
- Advert – flyer and poster
- 15 applicants
- Speed dating – guided conversation
- Scored answers and skills
- Plugged the gaps



# Successful recruitment

- Promotion
  - What makes it different
- Equality and Diversity
  - Is your panel representative
- Selection Process
  - Customer involvement
- Decision making process
  - Customer decision
- Team building
- Succession planning
  - Keep one eye on the future



# Identifying training needs and skills gaps

- Self awareness
- Application form
- Training needs assessment
- Group exercise
- Observation
- 1:1 s



# Training requirements.....

- Understanding social housing
- Regulation
- What is scrutiny
- Equality & diversity
- Business planning
- Performance
- Areas of challenge
- Good practice
- Influencing and negotiation
- Report writing
- Presentation skills
- Involving customers
- Project management
- Communication
- Budgets and finance
- Managing risk



# Delivering the training

- Learning styles
- Individual plan
  - Agree priorities
  - Delivery method
- Team plan
  - Agree priorities
  - Delivery methods
- Internal and external provision
- Mentoring
- evaluation





# Building confidence

- Assign tasks
- Buddies
- Networking
- Events
- Feedback
- Presentations
- Promotion



# Resourcing

- **Co-regulation is not cheap!**
- Financial
- Customer time
- Staff time



# Set up costs - Financial

- Promotion of Scrutiny
- Research
- Office space for Scrutiny Panel
- Creation of web site
- Initial equipment
- Team Building
- Induction
- Consultancy support



# Ongoing costs - Financial

- Promotion of Scrutiny Panel activity
- Stationary/postal
- Mobile phones?
- Expenses
- Training
- IT
- Hospitality
- Mentoring



# Staff resources

- How much time
  - Don't underestimate the resources required
    - Initially resource intensive
- What do they do
  - Minute taking
  - Evidence
  - Support and coaching
  - training



# Customer resources

- Our most valuable asset
- Invest in their wellbeing
- Impact
- Have their say
  - Reinvest savings
  - Service improvements



# Any Questions

