

Tenant and Customer Engagement Strategy

2016- 2021

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Introduction

This Strategy sets out Plus Dane's commitment to strengthen the voice of tenants and customers. It has been developed against a backdrop of significant and on-going change in Plus Dane and responds to the external challenges we currently face and prepares us for those that lie ahead.

We know how having effective tenant and customer engagement enhances our business and helps us understand how we can improve the way in which we deliver our services.

This Strategy therefore sets out a new strategic direction for tenant and customer engagement that supports our commitment to co-regulation by involving tenants and customers in governing, shaping, co-designing and scrutinising our services. It also recognises that Plus Dane can only succeed when staff, tenants and our customers work together in partnership.

This Strategy takes us to 2021 and provides opportunities in each year of its life to further refine and develop our strategic approach in consultation with tenants and customers.

Where are we now?

A recent review of our current tenant and customer engagement highlighted that we need to improve our engagement arrangements if we are to meet our own ambition to develop effective co-regulation and strengthen the voice of tenants and customers.

In developing this Strategy we have actively sought the views of a wide range of stakeholders on their aspirations for the future direction of tenant and customer engagement. The findings from these conversations have helped to inform this Strategy and pave the way towards a new culture of engagement across the organisation.

Why do we need a Strategy and where do we want to get to?

We aspire to create a truly modern approach to involving and engaging tenants and customers where their views help to drive forward service improvements. This Strategy therefore sets out a fresh approach that provides a new range of engagement options, including a greater use of technology so that we can be agile, flexible and positively respond to both external and internal challenges.

We will take steps to ensure that all of our engagement opportunities are fully accessible and inclusive and we make it as easy as possible for tenants and customers to provide feedback and engage with us.

We want to provide clear routes into involvement and evidence how we have improved services as a direct result of tenant and customer feedback.

If we are to meet our aspirations for co-regulation we need to develop scrutiny opportunities for tenants and customers to challenge the way in which we deliver our services and the decisions we make, helping us to drive value in what we do.

We will push culture change across the organisation to support our new arrangements. This new Strategy marks the beginning of our own journey towards modernised involvement and greater co-regulation and it will be the catalyst for the way in which we want to work in partnership with tenants and customers in the future.

We plan to:

- Build on good initiatives already in place.
- Introduce tenant and customer scrutiny.
- Increase the options for tenants and customers to become involved in a way that suits them.
- Use technology to create more flexible ways to consult.
- Find skilled and new members for our governance structure.

For the purposes of this Strategy, we define tenants as those who pay rent and receive services and customers as people who are in receipt of services that Plus Dane provide, such as leaseholders and shared owners.

Our Vision

We will have actively engaged tenants and customers and we will listen to them, value their contribution and use their feedback to help shape and improve services.

Aims of Strategy:

The aims of the Strategy are three fold:

- 1) Create a framework which encourages a diversity of tenants and customers to actively be involved in shaping, improving and scrutinising our services.
- 2) Make sure all tenants and customers, who want to, have the opportunity to have their say.
- 3) Be sure that what we do is outcome led.

Objectives that capture the strategic vision:

This new Strategy has the following objectives:

- Create and embed a new culture for engagement and adopt one approach across the organisation.
- Develop tenant led scrutiny to strengthen our commitment to co-regulation and influence and drive performance.
- Take a fresh approach to engaging tenants and customers and one that provides more dynamic opportunities for tenants and customers to help shape, influence and improve services.
- Create a framework which encourages more tenants and customers to have their say, offering greater levels of influence to a diverse range of tenants and customers and amplify their voice within the organisation.
- Enable engagement by providing properly resourced capacity building and training for tenants, customers and staff.
- Measure the impact of tenant and customer involvement to ensure that it offers value for money, makes a difference and leads to improved services and satisfaction.
- Exceed the HCA's long established Tenant Involvement and Empowerment Regulatory Standard.

The overarching themes that underpin this Strategy are described below.

Strengthening Co-Regulation

Engaging meaningfully with tenants and customers and providing opportunities for them to scrutinise and shape services is vital to the success of this Strategy. We will develop robust self-regulation that incorporates effective tenant engagement and supports accountability to tenants for services delivered and in dealing with issues or problems that may arise. We will create a culture of transparency and adopt a robust approach that

includes evidence based self-assessment, external challenge and regular reporting to tenants. We believe that the new structures will support the delivery of effective co-regulation.

Developing Tenant Led Scrutiny

The role of tenants and customers in helping to drive service improvement and contributing to the overall governance of Plus Dane is an important principle of this Strategy.

Scrutiny will play a key role in our governance and help us to receive tenant and customer feedback on our services. It will also help us take a high-level, long term view of service planning and delivery; checking that services reflect tenants and customers priorities, deliver value for money and help shape the business.

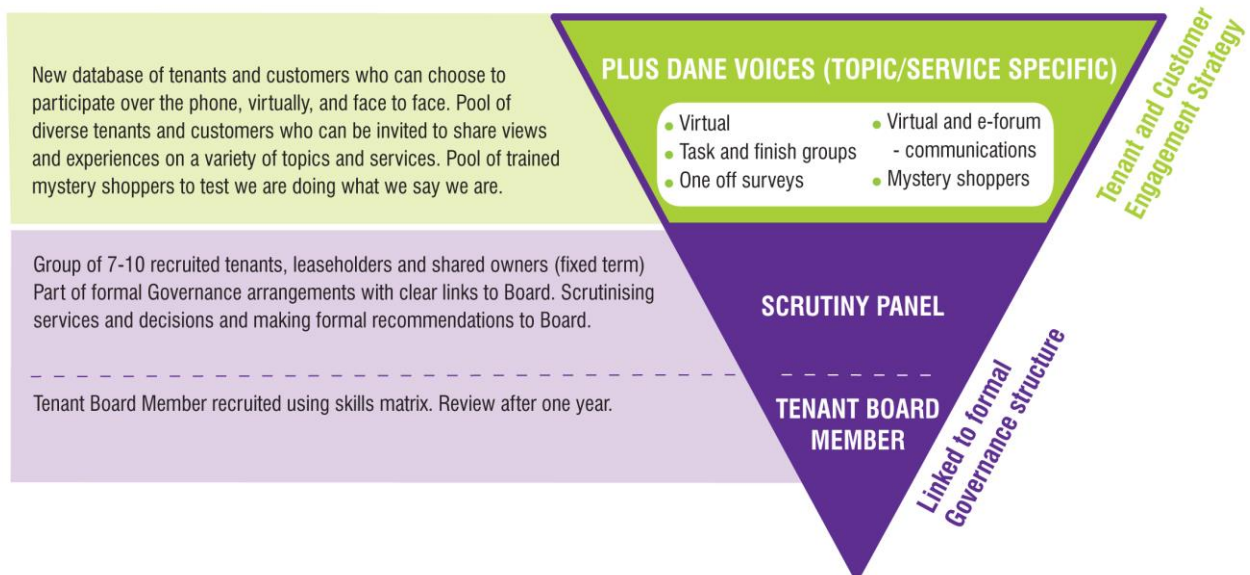
Effective scrutiny will see tenants and customers monitoring performance across services to identify trends and challenge weak performance, including consideration of benchmarking information.

Delivering the Strategy

Taking into account good practice, feedback from stakeholders and Plus Dane’s own desire to reshape our services to be fit for purpose, we will create and promote a dynamic menu of opportunities that provide a variety of both formal and informal ways for tenants and customers to interact and engage with us. This Strategy recognises the diversity of tenants and customers that exist and offers a menu of ways to accommodate their engagement needs.

The new engagement framework is summarised in the diagram and sections below. Our core focus will be on using customer insight and intelligence to support Scrutiny and commissioning Plus Dane voices to explore service standards and support business improvement.

What we will do...



Plus Dane Voices

By strengthening and embedding Plus Dane Voices we will be able to:

Increase the number and diversity of involved Tenants and Customers

To increase the volume and the diversity of tenants and customers to have their say, we will develop ‘Plus Dane Voices’. This will be a database of tenants and customers who will be a sounding board for the organisation. Tenants and customers will be able to participate in a way that suits them and choose what they get involved in. We already have over 300 tenants and customers on the database and plan to grow this to reflect our diverse customer base and use it to actively consult and seek feedback.

Plus Dane Voices will be dynamic and able to flex to meet the needs of how tenants and customers may want to share their views in the future. It will also support the organisation as it develops more sophisticated ways to engage.

We will utilise a range of consultation methods that reflect the way in which tenants and customers say how they want to be involved, these include task and finish groups, on-line, telephone and other surveys and we will embrace the aspiration to engage with customers more digitally through virtual forums. We need to optimise digital functionality for those customers who do use it but recognise that there will need to be a transitional phase to increase the numbers of tenants and customers using these channels and recognise that for some channel shift may never be a reality.

Use technology to increase involvement

We will provide tenants and customers the opportunity to get involved and have their say via their computer and smart phone so that they don't have to travel or commit lots of time. To achieve this we plan to integrate the Plus Dane Voices database into our existing website and create a bespoke portal for this activity so that tenants and customers can fill in surveys and communicate with us in a way that suits them. In addition we plan to explore the use of virtual forums and how we can optimise the App to increase digital footfall.

Deliver Value for Money

We will use insight and intelligence and develop mystery shopping as a tool to understand the impact of our services. Mystery Shoppers will be invited to test in real-time the services we deliver to make sure that we do what we say we do.

To ensure that involvement is meaningful and purposeful we will create task and finish groups for specific interest groups or topics that will help us to further understand the impact services have on tenants and customers.

We will ensure that future involvement opportunities are efficient, provide good value for money and are outcome focused. We will make sure we achieve value for money by reviewing what we do every year, being clear about what we will stop, start and continue, increase partnership work and compare our costs to those of other organisations. We will also publish how tenant and customer involvement has led to improved services and made efficiencies.

We will also take steps to integrate involvement into the organisations forward plan so that we seek the views of tenant and customers in a timely way, reflecting their views into future service improvements before they go to Board.

Locality based

We remain committed to involve tenants and customers at a neighbourhood level by continuing to support tenant groups and panels, however this will be on an as and when required basis and our role will be one of an 'enabler' rather than 'doer'. We will refresh our partnership agreement which underpins the support that we provide to grass roots activity

and map current activity so that we can understand gaps and put our resource where it is needed most. On the same theme we will continue to use local events either delivered by ourselves or our partners as a vehicle to provide an opportunity for both tenants to tell us about their priorities and for us to share information.

Scrutinising and influencing our business through formal governance

To underpin our commitment to developing co-regulation and scrutiny we will:

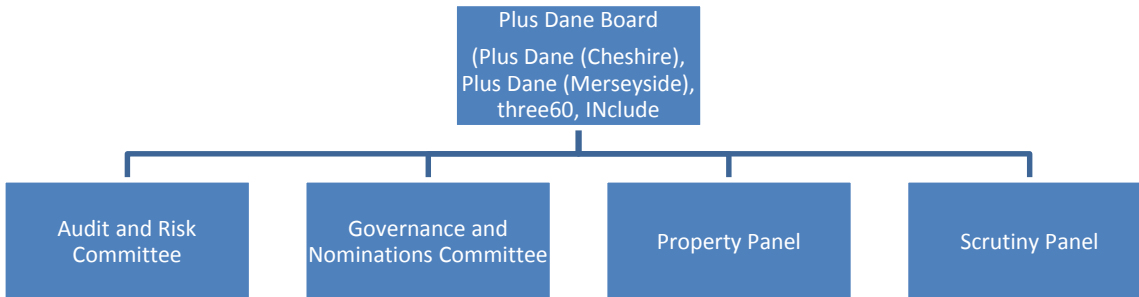
Set up a new; independent, tenant-led scrutiny panel

We will replace the Tenant's Together Forum and establish a new Scrutiny Panel, providing tenants and customers a bigger voice. The TTF was established to help manage the merger between Plus and Dane and has provided a consultation and challenge forum over the years. However, it is no longer fit for purpose and needs to be replaced to ensure that tenants and customers can scrutinise and challenge effectively. The new Scrutiny Panel will comprise of a group of seven tenants, leaseholders, shared owners and residents who live where we have significant number of homes. The Panel will also have the flexibility to bring in a further three tenants and customers to keep the panel fresh each time a scrutiny review takes place and to gain a deeper insight of the topic.

We plan to appoint scrutiny members through a robust recruitment and selection process ensuring that a representative panel is appointed with the right attitude to carry out their role effectively.

We will provide support, advice and coaching and develop the skills and competencies of panel members to help them fulfil their role effectively. The Scrutiny Panel will have a direct link to our Governance arrangements (see diagram below) and will have clear terms of reference ensuring that the voice of the tenant and customer is heard and is reflected in future Strategy, organisational objectives and priorities. The Panel will have access to customer insight to support their work and go beyond just reviewing services to help shape wider business objectives and decisions. With this in mind they will, also have the ability to commission parts of the business and engagement activities so that they can make informed recommendations to Board.

Diagram: Scrutiny Panel link to Governance structure



It is anticipated that the new Scrutiny Panel will conduct between two and four scrutiny reviews annually and that Board will receive the Scrutiny reports, complete with findings and recommendations. The detail of how the relationship between Board and the Panel will work will be set out in the terms of reference which will be developed once the Panel are in place. The Scrutiny Panel will identify areas for scrutiny reviews that are aligned to business priorities and use organisational data such as complaints and performance. The focus of the Panel will be about adding value and not duplicating the work that is already taken place in the organisation to improve services.

Recruit and appoint a Board Member who is a tenant of Plus Dane

We will look to recruit a Board Member from our tenant and leaseholder community, with the appropriate skills and experience to enhance and strengthen Board. We will use the skill matrix that has been developed by Board to appoint to the current vacancy. The role will be remunerated, and the recruitment process will be robust and part of the broader Board recruitment and renewal process to be undertaken in 2016.

To achieve efficiencies we will promote this opportunity at the same time as the promotion of the scrutiny panel and conduct a robust recruitment and selection exercise. We will review the post of Tenant Board Member after one year.

Building the capacity of involved tenants and customers

To deliver the new structures we will need to build the skills, knowledge and confidence of involved tenants and customers. We recognise that for some tenants and customers, getting involved can be a challenge and that many do not want to be actively engaged. We therefore will make a commitment that going forward those tenants involved in formal involvement opportunities will be given training and support. This will help to develop their skills, increase confidence and build their competencies so that they feel empowered and able to fulfil their role. In particular, we anticipate a full training programme for the new scrutiny panel and mystery shoppers.

We will ensure that all reasonable out of pocket expenses will be reimbursed.

To complement our training offer, we will promote the variety of external conferences and training that is available through organisations such as Trafford Hall and TPAS so that tenants can network locally and nationally.

Right to Manage and tenant management

The Right to Manage is an opportunity for tenants who are interested in taking on the responsibility of managing their own neighbourhoods. This is a statutory right for tenants of local authorities who are looking to set up Tenant Management Organisations (TMO). In the spirit of regulatory guidance, we will support those tenant groups who are keen to explore this as an option; however this will be negotiated on a voluntary basis.

Creating a new culture for engaging tenants and customers

We will create and embed a new culture for engagement and adopt one tenant and customer engagement approach across the organisation. This will include the development of a communication plan, reviewing the organisations forward plan, launching the new Strategy and developing an agreed way to measure the impact of involvement.

We will also develop a toolkit to promote the new menu of opportunities, routes into involvement and review the involvement pages on the website to ensure that they reflect the new offer.

A summary of the aims of each activity and how they fit into the overall objectives of the Strategy can be found at appendix 1.

Compliance with Regulation

The Homes and Communities Agency's (HCA) requirements for tenant involvement are outlined in the Tenant Involvement and Empowerment Standard. Implementing the new arrangements within this Strategy will ensure that we meet the HCA's Tenant Involvement and Empowerment standard. However, our aspiration is not to meet regulation but exceed the expectations that are placed on us by implementing truly modern ways of engaging tenants and customers.

The HCA's requirement is for housing associations to ensure that tenants are given a wide range of opportunities to influence and be involved. We have summarised below how we see our new structures supporting compliance with the HCA's standard, but more importantly going above and beyond these requirements.

HCA's Tenant Involvement and Empowerment Standard

HCA Requirements	Plus Dane's New Structures
<p>a) The formulation of their landlord's housing related policies and strategic priorities.</p>	<p>Plus Dane Voices and the new Scrutiny Panel will help us involve tenants and customers in the formulation of our policies and key strategies.</p>
<p>b) The making of decisions about how housing related services are delivered, including the setting of service standards.</p>	<p>Plus Dane Voices will offer tenants and customers new ways to engage. We will also encourage them to check the standard of our services by commissioning tenants and customers to take part in mystery shopping exercises.</p>
<p>c) The scrutiny of their landlord's performance and the making of recommendations to their landlord about how performance might be improved.</p>	<p>The introduction of a new tenant-led scrutiny panel with clear links to governance arrangements will help us to improve our performance.</p>
<p>d) The management of their homes, where applicable</p>	<p>This will be met by offering support for local tenants groups and consider requests from those tenant groups who wish to exercise the Right To Manage. .</p>
<p>e) The management of repair and maintenance services, such as commissioning and undertaking a range of repair tasks, as agreed with landlords, and the sharing in savings made; and</p>	<p>This will be met through the introduction of Plus Dane Voices and offering tenants and customers the opportunity to participate in task and finish groups around specific issues/topics.</p>
<p>f) Agreeing local offers for service delivery.</p>	<p>This will be delivered through the introduction of Plus Dane Voices offering tenants and customers new ways to engage and support local groups.</p>

What will Success Look Like?

What we will have:

- A range of involvement opportunities that offers both formal and informal routes.
- Active and regular interaction and involvement from tenants and customers.
- Robust co-regulation with tenants and customers at the heart of driving change.
- Evidence based decision making based on the diverse views of tenants and customers.
- Service improvements, increased efficiencies and value for money evidenced by effective tenant and customer engagement.
- Increase in numbers and diversity of engaged tenants and customers
- Compliant with the with the HCA's Regulatory Requirement and evidence that we are meeting the aims and objectives of this Strategy.

At the end of year one, we will review this Strategy and produce an impact assessment to measure its success and help us identify where and how engagement is adding value. In addition, we will establish a baseline position so that we can evaluate the impact of involvement activities and ensure that resources are directed to where they will achieve value for money.

This Strategy sets out a modernised involvement structure, sharply focused on listening to tenant and customer feedback and translating this into service improvement and increased customer satisfaction. We will monitor the impact of involvement from service improvement, customer satisfaction and value for money perspectives to ensure that involvement is productive and effective.

High Level Implementation Plan

In the first year of this Strategy we will focus on developing scrutiny arrangements and embedding Plus Dane Voices. We will review our delivery structures and implement new IT processes to support the strategy. We will develop a single and focused tenant and customer engagement service to deliver activities and support teams across Plus Dane. The focus will be on working in partnership with tenants and customers to improve services.

An implementation plan is at appendix 2 and we have summarised the key tasks under each theme. A number of factors will guide the implementation plan and influence our approach, timescales and resources required to implement the new model for tenant and customer engagement.

People

To ensure that this Strategy is appropriately resourced, we will review the existing engagement team so that we have the right resource and skills in place to deliver the new service.

We will support customer facing teams to help them promote the new opportunities made available to tenants and customers.

Crucial to the success of this Strategy will a greater diversity of tenants and customers being involved. To support this we will embark on a recruitment drive to increase numbers of tenants and customers. We will use a variety of routes and methods to recruit, making use of existing networks and taking advantage of new technology to reach as many tenants and customers as possible. In particular we will look to recruit seldom heard tenants and customers to the Plus Dane Voices database.

Processes

To deliver the key objectives of this Strategy we will need to review and change some of the organisations processes, these may include:

- Creating new process for signposting to engagement activity.
- Integrating data onto existing systems.
- Promoting opportunities during tenancy visits and day to day interactions.
- Embedding the link between new scrutiny panel and Board.
- Create a culture of continuous improvement and have processes in place to accommodate tenants and customers views and translate these into existing improvement plans.
- Ensure that future engagement is aligned to delivering the organisations corporate plan.

Technology

This Strategy will need IT support to integrate the new processes into existing and future IT systems to ensure that we have the capability to deliver some of the new ways to engage tenants and customers. In particular, we need to ensure that we have the capacity to deliver and embed the following functionality:

- Plus Dane Voices, integrated database in existing website and CRM.
- E Forums and virtual groups.
- Engagement button on Plus Dane App.
- Review website self-serve portal to accommodate engagement preferences and link to Plus Dane Voices.

Resources

This Strategy will be delivered within existing resources and the new ways of working will create efficiencies and deliver value for money. A business case will be developed, which sets out the resource requirements, costs and expected benefits.

Appendix 1 - Engagement Activity and Strategy Objectives

Activity	Detail	Objectives
Tenant-led Scrutiny Panel	The new scrutiny panel will be responsible for holding the organisation to account and scrutinising services making recommendations for improvements. It will complete a minimum of two and a maximum of four scrutiny reviews annually. Members will be selected using a skills-based application process.	Ensuring accountability, transparency and underpinning co-regulation.
Tenant Board Member	To sit on Board and be responsible for making decisions and agreeing strategic direction of organisation. Member to be appointed from across Cheshire and Merseyside	Ensuring accountability by involvement in Governance arrangements.
Plus Dane Voices	Integrated database of tenants and customers who can be involved, voice their views remotely. Will be consulted on strategies, policies, ideas for new products, specific service related issues. Members can choose how they want to interact	Increasing number and diversity of involved tenants and customers
Focus Groups/Task and Finish Groups	Focus on particular service areas. They will provide oversight and challenge as well as helping to shape policies, procedures and provide suggestions for service improvement. These will be short term in nature and focused on outcomes	Ensure accountability in specific service areas
Mystery Shopping	Real-time mystery shopping together with scenario based shops to check if we are delivering the service to the standard that has been set. Mystery Shoppers to be recruited and trained	Increasing opportunities for tenants and customers to shape future delivery of services
Virtual Forum (s)	Virtual forums will encourage tenants and customers to engage with us online. As this form of engagement is new to Plus Dane we will explore how these can be best used to optimise our reach. In particular we will look to develop a virtual forum to replace the communications panel	Increasing opportunities for tenants and customers to shape future delivery of services and interact with each other

Plus Dane Housing

Appendix 2 Implementation roadmap

