



Working together

to challenge the future of tenant involvement

Deborah Good, director of housing services, CIH consultancy

Jon Warnock, associate, CIH consultancy

June 2016





Contents

Introduction	3
The starting point	4
The agenda	5
The challenges	6
The responses	9
Case study: Mansfield Council	9
Case study: Caerphilly	10
Case study: emh group.....	11
Case study: Leeds Federated.....	11
Case study: Family Mosaic.....	12
Case study: Nottingham City Homes	13
Case study: Wiltshire Council	14
Case study: Coastline Housing	15
Case study: Boston Mayflower.....	15
Conclusion	16



Introduction

Tenant involvement has experienced a slow evolution over the last five years as the sector has come to recognise that traditional forms of involvement have a tendency to be inaccessible to the majority of tenants, unrepresentative of all but a limited cohort and expensive to develop and maintain. This realisation and the greater flexibility to develop local approaches to involvement have meant that landlords have started to embrace a more commercial approach; that tenants are individual consumers of services and interaction and influence should be focused at an individual as well as a collective level.

This Learning Report is the culmination of a 12 month project involving nine housing providers and facilitated by the Chartered Institute of Housing's consultancy team. Utilising the established Working together model we have shared our experiences of and expectations for tenant involvement. We have challenged current practices through interactive and provocative debate and we have gone on to look at the practical application of the emerging principles through onsite project work.

**Deborah Good, director of housing services,
CIH consultancy
deborah.good@cih.org**

Working together

If you'd like to know more about the Working together to challenge the future of tenant involvement project or join a future Working together project please get in touch:

T: 07506 851917

E: Deborah.good@cih.org



The starting point

The initial focus of the project was a recognition that the prevailing attitudes towards tenant involvement were shifting to reflect a changing operating environment. Precipitated by both internal and external factors it was clear that in a number of key areas the context for tenant involvement was moving towards:

- a recognition of the value of 'customer' focused business principles mirroring the commercial sector
- the collection, interpretation, and application of 'customer insight' as the principal involvement mechanism through targeted market research, informal interaction and social media
- a greater emphasis on evidence informed decision making
- the need to demonstrate value for money through cost benefit analysis and indicators of impact
- conflicting demands on resources and the temptation to divert away from tenant involvement and towards income management
- increasing competition from the private sector and a resulting need to adopt a more commercial approach to the notion of customer
- the emergence of the business board approach to governance and corresponding demands on greater strategic input from tenants below the 'main board'
- the value of social investment and community development in complementing neighbourhood interventions
- increased expectations of customers as a result of increased competition

Working together is an established delivery model from CIH consultancy. It involves sharing thinking, experiences and developing approaches with peers from across the sector. Participants attend a series of collective action learning sessions which form a 'critical path'. A fusion of CIH consultancy's own thinking, the thinking of participants and contributions from external contributors all create the ideal platform to debate and scope out the key ingredients that combine to inform new insight and 'next best practice' models.

Find out more about Working together:
www.cih.org/workingtogether



The agenda

In order to develop thinking we set a number of challenges to the project collaborators. These were intended to keep the debate focused on outcomes that would have tangible benefits to both organisations and tenants. These are, in effect, the aims of the project:

- offer greater levels of influence to a larger number and more diverse range of tenants
- increase the objectivity of tenant led influence through evidence based decision making
- increase effectiveness and validity of strategic and operational responses to tenants' needs and aspirations
- increase the efficiency and value for money of tenant involvement by targeting resources to the most effective areas

This Working together project brought together a number of different organisations from across the housing sector. The following organisations took part in the project:



The target audience

This report is aimed at officers and residents within housing organisations who have influence over their approach to involving tenants. It is hoped that the drivers identified will prove useful in stimulating fresh dialogue within the sector and within individual providers about how involvement is considered and how it is delivered, its importance and its potential value.



The challenges

Reputation and credibility

Key points:

- dominated by vocal minority
- unrepresentative
- high and unrealistic expectations
- adversarial
- subjective and cliquey
- no real understanding of the business case

These often repeated negative aspects have led to a somewhat jaundiced view of involvement. Involvement is often perceived as being unrepresentative, dominated by a minority of tenants of a certain demographic that generally has unreasonable and unrealistic expectations and adopts an adversarial approach when they are not met. This is sometimes unjustified but is quite often a true reflection of the reality.

Part of the problem is that there is a tendency to see tenant involvement as comprising formal and centralised mechanisms which, by their very nature, will only ever attract a certain demographic. We have a habit of not considering our passive and casual interactions with tenants as part of the spectrum of involvement. This is clearly a mistake as they are as important as the formal mechanisms and, in themselves, form an important source of customer insight. To help counter this we have started to look at involvement in the context of three distinct functions:

- engage
- involve
- invest

The troubled reputation of involvement has, in turn, led to a credibility gap amongst non-involved tenants, officers and governors. This sometimes leads to involvement being ignored, marginalised as a service and starved of investment. Involvement quickly ceases to be understood or valued and becomes an exercise of going through the motions because the organisation needs to be seen to be involving its tenants rather than having compelling business reasons for doing so.

There is no getting away from the fact that having a handful of involved tenants shape services for thousands of their fellow tenants based on their own subjective viewpoint has been widely discredited. For this reason we have looked to redefine the role of our involved tenants based on the idea that they are expert customers making evidence informed decisions.

Value

Key points:

- resource intensive but no real understanding of cost
- no clear mechanism for measuring outcomes or impact
- no clear purpose expected outcomes/objectives
- no links to core business objectives

The sector has done very little to establish the true value of involving tenants. There is a notion that it is resource intensive in terms of staff time needed to support it but we are generally unable to quantify this or the other costs associated with delivering involvement activities. Even when inputs are calculated this is rarely viewed in parallel with the outcomes and impact of involvement. Put simply, we have failed to establish relevant and meaningful indicators for involvement which will allow us to measure its value.



Examples of these measures could include:

Impact on services:

- improvements to quality and/or effectiveness of service
- improvement to reach and/or take up of the service
- increased diversity in service user
- efficiency savings

Impact on the individual:

- increased personal skills, knowledge and confidence
- increased employment opportunities
- improved quality of life
- increased satisfaction

Impact on resident involvement:

- increased opportunities to influence
- increased number of involved tenants
- increased diversity of involved tenants
- increased accountability and/or transparency

Tenant involvement is a form of investment and it is right to attempt to quantify the return that is achieved through some form of framing of the functions it is meant to deliver, how it links to business plan objectives and fundamentally how it benefits tenants. This has been brought very clearly into focus by enforced rent reductions and resulting budget pressures. The need for a mechanism to establish **cost benefit analysis** of tenant involvement is therefore strong.

Relevance

Key points:

- inconvenient and irrelevant
- unattractive
- collective to the individual
- too formal

The range of opportunities to get involved has become increasingly unattractive to all but a minority of our tenants. Formal meetings and standing committees don't seem to be in tune with what our tenants want yet we persevere in applying them as the key forms of involvement. We continue to offer them as opportunities and we are disappointed when the response is low. We ask 'why don't tenants get involved?' when we should be asking 'why would tenants get involved?' Tenants are increasingly seen as individual consumers and no longer should it be necessary for them to collect together in order to have a strong enough voice to influence their landlord. They may lack real choice, thus rendering their status as consumers somewhat limited, but nonetheless should be given real opportunities to shape services and hold us to account. This requires a renewed emphasis on targeted tenant engagement, utilising convenient and accessible communication methods alongside complementary involvement techniques. Part of this response has to be a movement away from traditional standing committees in favour of a **working group type approach**.

Tenants are not universally impressed by the term customer as it is seen as undermining the tenant and landlord relationship. We should be sensitive to this.



Culture

Key points:

- tokenistic gestures
- link to business aims / corporate plan etc
- paternalism
- involvement at end rather than at beginning
- perceived responsibility

The project facilitated debate about the effectiveness of tenant involvement as a real and meaningful opportunity for tenants to influence services and hold organisations to account. The importance of organisational culture was highlighted as a major factor in this. Even when there is not a prevailing paternalistic culture, a commitment to tenant involvement at a board or cabinet level and an executive management level is not always successfully embedded throughout the organisation. A great deal of this is about how staff targets and competencies are framed in relation to tenant involvement and the extent to which staff understand that real and meaningful involvement is a key contributor to the health of the organisation and its success in delivering its corporate objectives. This is really about establishing the business case and additionally how involvement can contribute positively to the delivery of team and individual objectives.

Culture is by far the greatest barrier and the greatest contributor to successful tenant involvement. Get it wrong and involvement becomes marginalised and tokenistic – something that is done out of duty or obligation rather than because it has an intrinsic value.

“As a business, why wouldn’t we listen to our customers’ views and wish to work with them to improve our services and products?”

Joanne Tilly, executive director – business support, emh group



The responses

Establishing the business case

The key to developing and maintaining the position and importance of tenant involvement within the organisational structure is to establish a clear business case. This should focus on how tenant involvement can contribute to the delivery of the organisation's corporate objectives. Central to this should be the principle that successful businesses know their customers and respond to their needs. Involvement is well placed to provide the infrastructure required to deliver on this driver.

"We need to involve our tenants in order to understand them. The more we involve them, the more we understand."

**Steven Johnson, independent advisor,
Collaborative Change**

Case study: Mansfield Council

The concepts identified during the project used to influence and change behaviours (social marketing / nudge theory) are therefore tools that can be used to help us achieve a cultural shift in attitudes and behaviours. We are currently in the process of developing:

- a customer insight framework that can be translated into positive benefits
- a more streamlined, active and flexible style of involvement
- a fit for purpose community investment framework that adopts an engaging and empowering approach where communities are offered a greater stake in the control of neighbourhood services and local assets
- a more engaged system between tenants and all officers with involvement becoming more routine, by strengthening the relationship and interactions between tenants and officers.

The project provided a stronger appreciation of the business case for using tenants' views to shape services and of the need to ensure the objectives for tenant involvement are explicitly linked to MDC's business plan objectives and focus on involvement activities that will deliver the most benefit and which are less resource intensive and as such we hope to deliver more for the same in terms of the resources available.

Jeanette Marples, policy unit manager, Mansfield council



Defining the functions of involvement

Being clear about what functions involvement activities are meant to fulfil will help to keep them outcome focused. The working model considered by the Working together project group is based on structuring tenant involvement activities around three functions:

- engage
- involve
- invest

The 'engage' element focuses on the wider tenant population and seeks to achieve outcomes such as informing, capturing insight, profiling, choice and consultation on specific proposals. Engagement activities are generally informal. 'Involve' focuses on the small number of tenants who are prepared to take part in more formal activities such as service monitoring and review, information content and design, procurement, strategic planning and scrutiny. 'Invest' covers the range of activities that focus on investing in individuals through personal development and capacity building and in communities through community development initiatives.

Tenants as consumers

The obvious response to operating in a more commercial operating environment is to view tenants as individual consumers of the services we provide. Doing so will ultimately result in a greater emphasis being placed on engaging with individual tenants in order to capture insight in relation to their experience as a customer along with their needs, aspirations and expectations. Using customer journey mapping will help achieve a greater perspective on how services impact on tenants.

Case study: Caerphilly

Overall we are using the experiences gained from the project to update our TP strategy to make the distinction between engaged tenants and involved tenants, to incorporate regular cost benefit reviews of our activities, to develop offers to tenants in terms of appropriate incentives, to respond to the needs of the service in terms of where tenant input is targeted and have stronger and clearer strategic and operational priorities for service improvement so that involvement activities can be better targeted. We have also involved staff in some joint workshops with tenants to discuss the way ahead.

Mandy Betts, tenant and community involvement manager, Caerphilly

Involved tenants as expert consumers

Redefining the role of involved tenants will help the shift towards a more objective and evidence informed approach to tenant influence and decision making. This is in stark contrast to the notion that involved tenants are somehow representative of other tenants and therefore have a right to arbitrarily make decisions on their behalf. Instead, the expert customer model is based on the idea that tenants are experts of their own experience and are well placed to help organisations interpret intelligence captured from other tenants from a consumer perspective rather than just a provider perspective. This fits well with the concept of 'co-creation'.



Case study: emh group

The project has helped a wider pool of staff to see that a co-creation approach can be a more constructive means of working with tenants than traditional meetings. It seems that the project has provided us with a fresh platform for engagement which is a very positive thing.

As volunteers, they contribute their time for nothing, and there is a strong business case for quantifying this contribution in order to ensure that the investment needed to facilitate involvement activities generates payback for the organisation.

The co-creation project has come at the perfect time for the organisation. Having got through the transition period and implemented the co-regulation structure at emh homes getting back to the basic fundamentals of Working together in a meaningful way will add greater depth and value to our work with residents and certainly help us align the work with the emh group values of integrity, diversity, openness, accountability, clarity and excellence.

Joanne Tilly, executive director – business support, emh group

Using customer insight

Intelligence captured from tenants should be seen as the primary source of experiential evidence on which many service decisions can be based. Insight can be captured in many ways including surveys, focus groups, casual interactions through, for example, call centres, complaints and general feedback. Key to the effective use of customer insight is understanding whose views are being captured using profiling data, and targeting those groups whose views are underrepresented.

This allows scarce resources to be effectively targeted and ensures a balanced range of insight. Stratification of market research and applying segmentation principles to the results, particularly demographically, will help with the application of the data.

Case study: Leeds Federated

A clear outcome of the Working together project is that staff should work co-creatively with involved customers to analyse the customer insight data and recommend service improvements.

The main structural change has been the disbanding of the Tenants' Federation and the creation of two new groups, the challenger panel and the board member Liaison Group. The new structure also makes a distinction between 'engagement' with Leeds Federated and 'involvement'.

It is recognised that formal involvement activities attract and interest only a minority of people and there is no hidden secret or quick win to attract masses of volunteers. The most effective way of placing customers at the centre of the business and service improvement is not by seeking the views of a few but by making systematic use of data and insight gained from customers. Involvement should no longer be measured in numbers but by meaningful outcomes. Effective involvement should be of clear benefit to both the organisation and the individual who is volunteering their time.

Jo Gardner, customer involvement manager, Leeds Federated

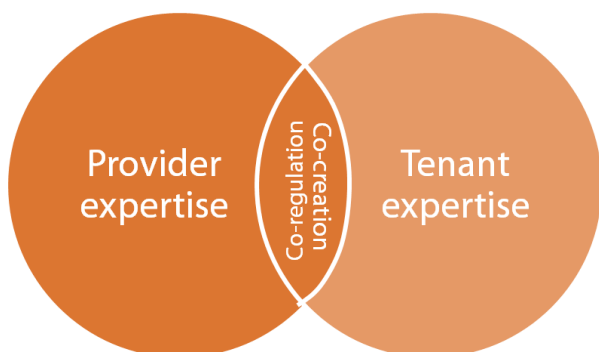


Evidence informed decision making

The credibility of involvement outcomes can be significantly boosted by the adoption of evidence informed decision making. This principle establishes that all decisions and determinations are underpinned by reliable and corroborated evidence. Involved tenants will most commonly apply experiential evidence from customer insight but may also use performance evidence from KPIs and benchmarking and contextual evidence pertaining to legal, regulatory or financial considerations. Making decisions using evidence removes the burden of representativeness from our involved tenants and renders their outputs far more reliable, accountable and transparent.

Adopting co-creation principles

Co-creation is based on the idea that by involving tenants directly in the design and development of their own services, organisations can establish far more responsive, sustainable and effective service provision. This requires tenants to be involved at the earliest possible point in service development and review. It draws its attributes from an obvious concept; bringing together expert customers (tenants) and expert providers (staff) at an appropriate stage to design services, service standards and service targets. If these two sets of expertise come together in a creative and collaborative environment then it is likely to result in very positive outcomes.



"There has been a significant change in thinking in relation to customer involvement as a result of the CIH project."

Jo Gardner, customer involvement manager, Leeds Federated

Case study: Family Mosaic

The principles of co-creation and the reflections on resident involvement within the broader spectrum of customer insight were particularly pertinent to us. Our initial research both challenged the top-down approach to resident involvement and the treatment of the involved tenant as 'the' resident voice. Some interesting ideas for new models emerged, particularly the idea of 'data interpreters' replacing traditional consultative models. Co-creation gave us new ways of working with our residents effectively. Earlier involvement of residents improves outcomes for both residents and landlord and supports genuine collaborative working.

The project provided a fantastic platform for discussing these issues openly, sharing experiences and providing invaluable advice around how to manage such transitions.

Jemma Moulard, head of policy and research, Family Mosaic



Understanding the impact and the cost

Like all other services, tenant involvement should be subject to the principles of value for money. Many of the outcomes of involvement are qualitative but nonetheless real effort should be put into designing mechanisms that establish the cost of delivering involvement activities and measuring the outcomes and impact. Any cost benefit analysis of involvement should look to identify the full extent of required inputs including quantifying staff and volunteer time. Benefits should ideally be based on a range of measures that can be seen to link directly with the organisation's corporate objectives. Undertaking such an appraisal of involvement will need to establish a clear purpose and an outcome focus for tenant involvement. It will require adult to adult conversations with involved tenants as potentially some activities will require significant modification or even cessation if their value for money cannot be clearly demonstrated.

The task and finish approach

One response to the difficulties encountered in recruiting to traditional standing groups is to adopt a task and finish approach. This requires the recruitment of a database of tenants who are prepared, as and when required, to take part in activities with the provider. This could include service reviews, monitoring, or even scrutiny activities. Ideally this would be based on co-creation principles and would allow for an appropriate degree of self-selection. The obvious benefits of task and finish are that they provide a more attractive proposition for involved tenants as they require less time commitment and allow for areas of interest to be satisfied and specialisms to be developed.

Case study: Nottingham City Homes

From the CIH sessions in London and the following on consultancy sessions working with Jon Warnock, NCH is in the process of developing its own in-house Cost Benefit Analysis and social impact assessment process. We set up a steering group consisting of chair of NCH board, involved customers, the director of housing and other staff members to vision and shape a CBA/social impact model that was non-academic and easy to use across the business.

The steering group met twice to develop the process and then to trial and test its effectiveness using the NCH annual tenant fun day which took place in September 2015 as a pilot test. Following the test run the process has been amended and a scoring/assessment matrix developed. The CBA/social impact process (and matrix) is due to be presented and discussed by the NCH executive management team. Subject to approval, it is envisaged that the process including detailed assessment programme, will be implemented in the new financial year.

Ann Lynch, head of involvement, Nottingham City Homes



Case study: Wiltshire Council

A key learning point from the project was rigorous scrutiny arrangements embraced by the organisation and embedded into operations with a view to lifting standards even higher for the benefit of all residents and their families; broadening out the engagement profile to include tenants and leaseholders; efficient support with sufficient depth of investigation to provide management and board members with findings which can be accepted as appropriate and implemented accordingly, all encased within a low-cost, high-impact, value-for-money (VFM) framework, with set timescales and expectations, which assist in framing the work profile of the group.

The focus of resident engagement activity has been on building up mechanisms which enable residents to engage with us in ways which suit them best, and to make a commitment appropriate to their circumstances.

Dot Kronda, tenant participation manager, Wiltshire Council



Proactive recruitment

A response to the idea that inviting tenants to get involved has taken us so far but ultimately seems to be limited in terms of attracting tenants in meaningful numbers and with suitable diversity to the involvement opportunities we offer. Proactive recruitment campaigns, on the other hand, utilise effective promotional activities and employ incentives that will encourage interest. The most effective approach is to develop a clear understanding of the range of factors that would motivate the target demographic to get involved and focus the recruitment campaign around them. It is important to recognise that it is entirely acceptable for tenants to get something out of being involved and that incentives can very often be group specific.

Treat involved tenants as volunteers

There is merit in replicating the approach third sector organisations take managing their volunteers. Most will adopt some form of volunteers agreement that sets out the nature of the relationship, key responsibilities and safeguards. Many will have a process for appraisal and addressing personal development linked to training and qualifications and have routine supervision on an individual basis.



Utilising digital communication

Embracing the digital revolution is an essential tool in the process of engaging with a wide and diverse range of tenants. The increasing web coverage and prevalence of smart phones means that self-service and effective communication with tenants through these platforms is becoming an increasing reality. Social media is also a valuable method of collecting unsolicited views from tenants which can add another perspective to our customer insight. It seems eminently sensible to utilise the push for digital inclusion as a means to promote tenant engagement as well as customer self-service.

Case study: Coastline Housing

The project's focus on ensuring that involvement is outcome focused and linked to ensuring continuous improvement within the organisation has helped us review our involvement structure. This has led to the development of Coastline Online, an online consultative group who provide feedback on our services and the information will be fed into our great homes and great services teams to support their decision making. The access and digital transformation strategy for the first time at Coastline brings together all aspects of customer access including involvement. That will ensure that involvement continues to be embedded across the organisation and that the ways in which we can gain customer feedback is as broad as possible.

**Claire Reeves, community investment manager,
Coastline Housing**

Case study: Boston Mayflower

From the project, we have redeveloped our entire customer involvement framework in consultation with staff and customers. We have removed the areas of involvement that did not work (e.g. walkabouts) and increased the areas that are popular and useful to both staff and customers (e.g. participation events and monitoring groups). We are also using customer insight more effectively for engagement by targeting certain groups and using contact preferences.

We have also refocused our efforts and budget away from our incentive scheme as we established that customers prefer to feel valued for their work and to see that it makes a difference rather than receive monetary benefits. Instead, we have adopted a training and development plan for all involved customers and a communication strategy to publicise the work of involved customers.

Furthermore, we are moving towards cost benefit reporting and looking at social impact of our customer involvement activities and using co-creation techniques to redevelop our customer participation framework and then coming up with actions to further encourage and empower tenants in co-creation.

**Jessica Hyland, scrutiny officer and Kimberley Ellis,
customer participation officer, Boston Mayflower**



Conclusion

We hope you have found this learning report useful and that it will provide an effective resource to all those organisations working to develop increasingly effective responses to the challenges of tenant involvement.

In order to develop the learning points identified in this report CIH consultancy is planning a further Working together project around the theme of tenant involvement. This project will expand on the idea of involvement as a form of business investment that requires a tangible return to both the organisation and tenants. It will specifically focus on resource management and an examination of how involvement models can be rendered more effective and efficient in order to maximise value for money.

For more details on this project and opportunities for your organisation to get involved please contact:

Deborah Good

Director of housing services, CIH consultancy
07506 851917

CIH consultancy supports effective tenant scrutiny that delivers continuous service improvement and provides high quality, customer-focused services.

How can we help you?

Our co-regulation and tenant scrutiny service includes:

- critical review of existing tenant involvement, consultation and scrutiny arrangements
- support to develop your business case for involvement and for shaping practical and effective scrutiny and involvement arrangements
- development and capacity building of tenants and staff through training, advocacy and mentoring
- support for the development of sustainable local agreements

To find out more about the work we are doing and how we can support you please contact Deborah Good, director of housing services on 07506 851917.



CIH consultancy
Octavia House
Westwood Way
Coventry
CV4 8JP

E info@cih.org

T 024 7685 1779

www.cih.org/consultancy

