



CLOCH HOUSING ASSOCIATION LTD	
Policy Name	Customer Engagement Strategy
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Next Review	01/11/2021
Equalities Impact Assessment Required	No
Link to other policies	RTO Policy
Consultation	Yes – Internal and External
Need for Procedure	No

Jargon Buster

This section gives information on some of the unfamiliar terms used in the Customer Engagement Strategy:

ARC – Annual Return on the Charter. The ARC is an annual return to the Scottish Housing Regulator containing a range of information on performance and the context in which we work.

Business Plan – a formal statement setting out the goals of the Association and how these goals will be achieved.

Board – a voluntary group of representatives from the community and tenant members elected from shareholders who direct the Association's activities.

Code of Conduct – sets out minimum standards for behaviour for contact between the staff, contractors and customers.

Customers – our main customers are the tenants of the association and owners to whom we provide a factoring service. We also deliver some level of service to applicants for housing, leaseholders and owners in mixed tenure estates where we manage scheme repairs.

Customer Panel – a group made up of staff and tenants who work together to develop consultation and check the progress of the Customer Engagement Strategy.

Monitoring – check progress.

Measuring performance – assessment of the results at the end of any activity.

Outcomes - a result we want to happen. The Scottish Social Housing Charter has outcomes that landlords should achieve for the benefit of their customers and communities.

Procurement - is activities related to purchasing goods, services and works at the best possible prices.

Registered Tenants Organisation (RTO) – an independent group of tenants set up to primarily represent tenants' housing and related interests. If a group registers as an RTO with their landlord, this supports the groups' rights to information and consultation.

RTO Register – means a list of tenant organisations maintained by the Association.

Scottish Housing Regulator – The SHR regulates registered housing association landlords and protects the interests of current and future tenants and other customers monitoring performance and financial probity of social landlords.

Self-Assessment – assessment of the Association's performance which is used to improve our performance & provided to the Scottish Housing Regulator.

Scottish Social Housing Charter- the Government's standards that we must comply with and against which the Regulator monitors us. The charter was set after extensive consultation with tenants of housing associations and aims to reflect their key concerns.

Tenant Participation Advisory Service (TPAS) / Tenant Information Service (TIS)
– both are national tenant and landlord participation advisory services promoting good practice in tenant participation throughout Scotland.

1. Introduction

- 1.1 This strategy document is Cloch Housing Association's Customer Engagement Strategy for 2018 – 2020. We have developed this strategy and will measure our success in partnership with our customers.
- 1.2 Our Customer Engagement Strategy aims to support and encourage customer engagement by providing an effective framework for involving our customers in shaping our direction and services. The framework will give us a range of tools to allow our customers to engage with us in different ways.
- 1.3 We accept that we need to understand our customers to be able to make sure we can be responsive to their needs.
- 1.4 We recognise our on-going legal responsibilities under the Housing (Scotland) Act 2001 in relation to tenant participation. The focus of the Customer Engagement Strategy however, is to ensure customer engagement in delivering and monitoring our performance in relation to the Scottish Social Housing Charter.

2. Background

- 2.1 Cloch Housing Association aims to provide opportunities for all our customers to play an active role in the management of their homes and the delivery of services. These opportunities will vary to ensure that customers can participate in a way and at a level that encourages customers to contribute both individually and collectively.
- 2.2 This Customer Engagement Strategy sets out the framework for how the Association will work with its customers over the next three years to ensure they can influence decisions about their homes and the neighbourhoods they live in.
- 2.3 This Strategy provides information on:
 - the range of ways for customers to become involved.
 - the support and resources available for engagement.
 - how to register as a Registered Tenants Organisation.
 - how the strategy will be measured, monitored and reviewed.
- 2.4 In the development of this Customer Engagement Strategy, we consulted widely with groups & individuals and continue to involve our customers in measuring our progress.
- 2.5 Our commitment

2.5.1 Cloch have long involved our customers in all aspects of our work. For example:

- we have supported Registered Tenant Organisations (RTOs);
- we have held consultation events;
- we have made sure tenants and customers have, and do, play a key part on our Governing Board;
- we have established a tenant- led scrutiny panel.

The real experts on home and neighbourhood are our customers. That is why their aspirations are now at the heart of all we do. By actively involving them, listening and acting on their ideas, we make better decisions.

2.5.2 We will continue to make tenant and customer participation the norm – not just a policy.

2.6 What is Customer Engagement?

2.6.1 Customer Engagement is about customers being involved and influencing decisions about:

- Housing policies, conditions and related services.
- Scrutiny of the Annual Return of the Charter.
- Presentation and content of our published documents.

2.6.2 In promoting customer engagement, we will:

- Meet our statutory, regulatory and contractual duties to tenants and residents and to comply with legislation and codes of practice.
- Comply with the relevant Scottish Housing Regulator and Scottish Federation of Housing Association guidance.
- Encourage involvement of all customers regardless of age, gender, race, religion, marital status, political or sexual orientation or disability.
- Monitor the effectiveness of our performance and provide feedback to all customers.

2.7 Why have a Customer Engagement Strategy?

2.7.1 It is simple: to involve you in shaping our services and in making decisions about your homes, your support and your communities. This Customer Engagement Strategy describes how we will engage with you in the 3 years from 2018 to 2020. This Customer Engagement Strategy will be progressed

and owned by appropriate staff and reported back to you and other people involved with Cloch as part of an assessment / outcome-based process.

3. Aims of Customer Engagement Strategy

3.1 Link to our business plan

Our Customer Engagement Strategy is linked directly to the objectives in our Business Plan which is a formal statement setting out the goals of the Association and how we plan to reach those goals.

3.2 Ensure we meet the Scottish Social Housing Charter Outcome 3

Scottish Social Housing Charter Outcome 3: Participation

Social landlords manage their businesses so that tenants and other customers find it easy to participate in and influence their landlord's decisions at a level they feel comfortable with.

This outcome describes what landlords should achieve by meeting their statutory duties on tenant participation. It covers how social landlords gather and take account of the views and priorities of their tenants; how they shape their services to reflect these views; and how they help tenants and other customers to become more capable of involvement.

We will involve customers in the assessment of our performance as required by the Scottish Housing Regulator (SHR) in the process of self-assessment and to ensure that the performance measures and action plan within the Customer Engagement Strategy is developed with customers and kept under review.

3.3 Comply with the law

The Association is committed to ensuring that we comply with the legal requirements set out by the Housing (Scotland) Act 2001 and meet our obligations to consult with our customers, produce a Customer Engagement Strategy and to hold a register of tenant organisations

3.4 Link to our policy framework

The Customer Engagement Strategy has clear links to many of the association's policies and strategic documents as it underpins the landlord/customer relationship which in turn affects most of our activities.

3.5 Be flexible enough to work for different types of customers of the association

Our customers can be tenants of the association, owners in factored or mixed tenure properties or other service users who have an interest in decisions that affect them in their homes and in their communities. We aim to put our customers at the heart of service provision to help us to provide responsive services that meet their needs.

3.6 Deliver change

Because of effective customer engagement, we aim to:

- improve overall satisfaction with our service delivery;
- gain greater value for the money we spend;
- improve communication between staff and tenants.

3.7 Improve our relationship with our customers

Our Customer Engagement Strategy aims to:

- empower our customers to have the confidence to give us their views and influence decisions;
- enable staff and customers to be more aware of each other's perspectives;
- minimise misunderstandings, build trust and mutual respect between landlord and customers.

3.8 Develop and improve over time

We recognise that it takes time to achieve these benefits and that Customer Engagement must be developed at a pace that customers are comfortable with.

3.9 Give a structure for our activities

We will jointly develop an engagement action plan and calendar which will be reviewed and agreed on an annual basis, normally in April of each year.

We will:

- carry out an assessment against the performance measures for the Scottish Housing Social Charter annually;
- involve customers to direct and contribute to the self-assessment process;
- involve customers in the development and agreement of the action plan and calendar for customer involvement each year;

- monitor how we are performing against each item set out in the action plan.

3.10 Be subject to review

The Customer Engagement Strategy will be reviewed every three years.

3.11 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 do not have to travel or commit lots of time. To achieve this, we have created a tenant portal ("My Cloch" – my.clochhousing.org.uk) for this activity so that tenants and customers can fill in surveys and communicate with us in a way that suits them.

3.12 Deliver Value for Money

We will 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 specific groups 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 RSL's. We will also publish how tenant and customer involvement has led to improved services and made efficiencies.

4. Understanding our Customers

4.1 We need to understand our customers so that we can reflect customers' needs in what we do and how we do it. This applies to the process of customer engagement as much as it does to general services. There may be barriers that get in the way of effective engagement. To involve, empower and include more customers in the management of their homes, we need to identify ways to widen access and engagement with customers in ways that suits them and to remove any barriers that get in the way.

4.2 We recognise our different customers will have different requirements and interests so that 'one size fits all' engagement is not appropriate.

4.3 We will develop & use 'customer insight' to better understand the views and experiences of customers to make improvements to the service where required. In practical terms, customer insight is:

- The use of information about customers to better understand their needs, wants, expectations and experiences. This can be on an individual or a community level.
- The active application of this understanding in the design and delivery of services that better meet customers' needs

4.4 In 2018, we asked an independent researcher to carry out a tenant satisfaction survey to give us some customer insight as a starting point, the results should be available in early 2019. This will provide up to date information about as many of our customers as possible – household types, any language or communication preferences, ethnic origin and disabilities. This will be used to identify barriers to engagement and allow us to remove them. It also gives us direct information on how services were being received. Our tenants' main areas of concern and interest will be identified. Different methods of engagement will also be reviewed. A further survey will be undertaken every 3 years to update this information.

4.5 We will continue to develop our customer insight to:

- ensure our information on customers is kept up to date by regular review;
- use individual contact with customers to ask about any changes when they contact us;
- use service reviews, independent surveys and mystery shopping as research tools to better understand views and experiences of customers;
- use the information from complaints as a tool to challenge our understanding of what customers want.

5. Our Standards for Consultation

5.1 We will consult and engage with our customers on the following:

- Any significant changes to policy and service standards affecting our main services i.e. rent and service charges, repairs and maintenance service, estate management, anti - social behaviour or other changes that have a significant impact.
- Changes to the agreements that we have with customers.

- Planned or cyclical works programmes.
- Procurement of the most significant services & contractors.
- Changes to the Customer Engagement Strategy.
- Changes to our customer care standards.
- Any local issues that may significantly affect tenants and residents.
- Performance monitoring – setting standards and reviewing performance against the standards.
- Measuring performance against the standards and outcomes in the SSHC including the annual return on the Charter (ARC) and the programme of self-assessment.

5.2 From time to time, changes are required due to amendments in the law or guidance affecting our services. Where we have no discretion, we will not consult on the changes themselves, but will provide information to customers affected and we may consult on when, or how, the changes are implemented.

5.3 We recognise that there is a need to have different levels of resources available for different types of customer. The timescale for any consultation and the resources available will also reflect the complexity of the policy or service issue being reviewed

5.4 When consulting with customers we will strive to meet the minimum standards set out below:

- We will explain clearly the detail of the thinking behind the possible change, offer options for change and how each change would impact on individuals.
- Notify customers of timescales for comments to be returned to the Association.
- Provide information on how and when feedback will be given on the consultation.
- Provide access to notes of any meetings (where applicable).
- Give details of which staff are dealing with the consultation and how to get in contact with them.
- Give details of how, when and by whom final decisions will be taken.
- How to express any dissatisfaction with any stage of the consultation process.

5.5 Information and communication

5.51 It is important that communication flows both ways between us and our customers. Our customers need accurate and accessible information if they are to make informed choices. The Association is committed to ensuring equal access to our services and to ensuring that we do not unfairly discriminate against our customers. Our Equalities Policy, which outlines how we do this, is available from the Association on request or from our website.

5.5.2 The Association is committed to ensuring the provision of information that best suits the customer:

- Written communication will be provided in Plain English.
- Customers will be offered information in the appropriate format where requested e.g. Braille, large print, audio, and in other languages.
- When arranging meetings, we will consider the different needs of different customers and endeavour to meet them. We will assist customers by providing signers and interpreters for meetings on request and will ensure that all venues are fully accessible. We will consider providing crèche facilities or the timing of meetings to assist parents or working tenants to attend.
- Customers will be asked by staff to provide details of any requirements and will be encouraged to advise us if their needs change.

5.5.3 We will ensure we use a variety of communication methods for providing information, to start the process of engagement. Every contact with a customer is an opportunity for engagement.

5.5.4 Forms of communication will include:

- Letters sent out individually.
- Newsletters.
- Questionnaires & surveys by post, online or email.
- Telephone surveys.
- Meetings with customers.
- Events.
- Use of website, Customer Portal & social media.
- Tenants Handbook.
- Information leaflets.

- Mailshots.
- Customer Engagement Action plan and Calendar.
- RTOs or tenant groups.

6. Toolkit for Engagement

- 6.1 This Customer Engagement Strategy aims to provide a range of ways customers may engage with us to shape and review our services. These activities can only be successful if customers continue to wish to use them and we can resource them. Different approaches are suitable for different types of situations and to respond to different customers' needs and desire to get involved.
- 6.2 The list below identifies some of the main ways we will consult and engage in the period of the Customer Engagement Strategy. This list has been developed based on feedback from our customers on what we jointly think is effective and practical. Other approaches may be tested and added from time to time.
- 6.3 The following is a summary of our key mechanisms for engagement with our customers:

Customer Scrutiny Team – this group is made up of customers who have volunteered to take an overview of our engagement activities and to help us set the course. They help to set the action plan and calendar for engagement activities and to review how successful they have been. Specifically, they assist us to monitor our performance in delivering key areas of service and assessing how well we are meeting the standards and outcomes in the Scottish Social Housing Charter. The focus group may include short life groups looking at services on a thematic basis. For example, an annual review of planned maintenance expenditure or budget setting leading up to the rent increase decision.

Independent Tenant Satisfaction Survey – an independent survey of tenants is carried out on a regular basis (usually every 3 years) to provide a benchmark of how services are being received. The content & methodology is partly determined by the information required for the ARC but also considers consultation with customers on areas we should be considering. The survey also helps us identify people who may be willing to be part of other consultation activities and plays a part in identifying what areas of service need to be reviewed.

E-Consultation Register – this register is a list of tenants who have told us that they would like to be consulted by email on policies and service areas that are of interest to them. This will normally be done for straightforward issues or where a quick response to gauge opinion is required. We will also post information and ask for feedback via social media and our customer portal.

On-going Service Satisfaction Surveys and Questionnaires – We use a range of surveys to measure satisfaction levels with our main on-going services. We will often offer a prize draw to encourage a response which can be up to the value of £50 in gift vouchers. We may carry surveys out by telephone for some areas where more detailed discussions are required to a smaller number of people.

Service Review Groups – When there is a service or policy review, we will hold either a single meeting or several meetings chaired by a member of staff to discuss key issues in detail. These groups will be drawn from people who have expressed an interest in being involved or who may have recent experience of a service including people who may have recently made a complaint. The information gathered from these meetings plays an important role in informing the decisions made and how we go about implementing any changes or improvements. Out of pocket expenses for e.g. bus fares, taxi fares will be refunded to those in attendance and we may offer other incentives to attend.

Tenants' Conferences & Public Events – Events may be held to promote a service, give information out, to consult on a major issue or for social/community reasons. We also attend events held by other organisations such as Community Gala's, service launch events and public information events. These allow face to face contact with customers to comment on any current housing issues and to give information on any future changes in service delivery that may affect them. It is also an opportunity for customers to find out more about our consultation activities and to sign up to take part.

Estate Inspections – tenants and residents can meet with staff from the Association to inspect communal areas locally and work together to resolve any problems. These are normally done where there is a problem or at the request of residents.

Registered Tenants Organisations (RTOs) – This is a more formal way of engagement with the Association. An RTO is an independent organisation set up to represent tenants and residents in their local area, operating in a way that meets the requirements of housing legislation. They will have elected office bearers and a formal constitution. RTOs can seek registration with their landlord which opens access to grant funding and other support. RTOs have a recognised role in tenant participation and must be consulted on any proposed changes to policy and any changes to service standards. Our policy in relation to registration and support is available separately.

Informal Community Groups – These groups are set up to represent tenants, residents or other interested parties in their local area and usually meet to discuss housing issues affecting them and other matters of interest in their community. Staff from the Association will attend meetings if invited, to discuss areas of common interest or local concerns.

Community Partnership Meetings & Community Councils – We will take part in discussions that focus on housing issues, the environment and wider issues in your community.

Newsletters – We are always looking for articles for our newsletter which is published quarterly and aims to inform residents about current housing issues and give feedback on the outcome of engagement activities. We include a regular ‘you said, we did’ articles, where appropriate, to tell you what changes have been made because of customer feedback, where appropriate. We welcome any ideas or suggestions of what tenants would like to read about.

Review of Complaints - Every contact with a customer is an opportunity to engage with them and the feedback from a customer who has had a bad experience, is particularly valuable. We review our complaints to make sure we learn from them. The details are reported to our Board with a summary of the main changes to services which have been implemented because of the feedback from complaints.

Areas for Development

These are activities we are keen to develop if there is interest from our customers.

Mystery Shopping – Mystery shopping involves working with customers to track their customer experience to fully test the service that they receive. The mystery shopper records their contact experience and gives their views on how their query was handled. This information is gathered by each mystery shopper and is collated, allowing us to identify training issues or any areas for improvement in our service. The process can often work best when managed by an independent group or person.

Tenant Led Inspections – We are interested in working with tenants to develop tenant led inspections. This involves a thorough training and planning process before trained inspectors come in to our offices to inspect aspects of our service delivery. Their assessment will include making recommendations to the landlord on how to improve the service. Normally, this is done in larger organisations or on a reciprocal basis between the tenants and landlords of two organisations so that the inspectors can be impartial and independent. This approach takes time and commitment from the tenants and the landlord to develop but can deliver detailed information on how a service works in practice. If our engagement identifies people who wish to work with us to develop tenant led inspections, we will provide the resources to train and equip the customers to take part.

Giving Feedback - Feedback from consultation exercises will be reported in the newsletter, on our website, at local meetings and, where appropriate, to individuals.

7. Performance Review

- 7.1 There is no point in a Customer Engagement Strategy if we do not know if it is working and how well it is working. We are committed to developing an effective Customer Engagement Strategy which means we will monitor, review and measure its effectiveness. We have identified several key actions, priorities and outcomes forming an action plan. We will review the progress of the Customer Engagement Strategy against these.
- 7.2 The Customer Engagement Action Plan and calendar for engagement will be agreed annually. We will report on our progress and performance against the Action Plan to all our customers in our newsletter annually after a full review with our Customer Panel.
- 7.3 We will review the success of our engagement in general using feedback from our Independent Tenants' Satisfaction Survey.
- 7.4 We will consider the effectiveness of specific activities in light of the following:
- The number of customers who participated
 - The resources required to obtain feedback
 - The quality of the feedback obtained
 - satisfaction with methods of participation
 - Whether the engagement activity successfully engaged a range of customers from different groups (including hard to reach groups)
- 7.5 We will regularly review our Customer Engagement Strategy to ensure we are flexible in the face of changes to housing conditions and the environment in which we operate. Regular reports on our progress against our action plan will go to our management team. Our action plans will be reviewed on a regular basis by staff and customers.

8. Resources and Training

- 8.1 The Association does not directly employ specialist staff to carry out customer engagement activities, but all staff have a remit to engage with customers. This is part of their day to day work as well as having scheduled activities which are carried out from time to time.
- 8.2 We will work with partners to build the capacity for engagement to assist with tenant engagement and scrutiny where this is appropriate.
- 8.3 We have a dedicated budget which is reviewed annually and set at a level to allow the delivery of the Customer Engagement Strategy. This includes a budget to support Registered Tenants Organisations, costs of holding events; holding consultations and meetings; membership of relevant bodies; training

costs; incentive payment costs (e.g. for participating in, for example, mystery shopping), cost of independent satisfaction survey, various satisfaction surveys prize draws (up to £50) and other administrative costs.

- 8.4 We support the setting up, development and continued operation of Registered Tenants Organisations by providing financial support to assist with the costs of setting up and running a group. Our policy on this is available separately.
- 8.5 We recognise the need to provide training for both staff and tenants involved in tenant participation. Resources will be provided for staff, individual tenants and tenant groups who wish to further their knowledge and to encourage participation by offering training through the Association or other organisations.
- 8.6 We will work with outside organisations such as the Tenants Information Service (TIS) and Tenant Participation Advisory Service (TPAS) who can support and train our tenants' groups. We are keen to see our tenants take part in regional and national tenant forums – these include those events organised by local authorities, Scottish Government, TIS and TPAS. We have engaged TIS to provide support to the organisation in relation to:
- training for staff, tenants and our board;
 - expert support for staff and tenants to develop customer engagement;
 - develop and support for tenant led inspection;
 - achieve TIS Accreditation for the organisation.
- 8.7 Appropriate training will be provided to members on the Board to ensure that they have the necessary information, skills and confidence to make informed choices and contribute effectively.

9. Appeals and Complaints

- 9.1 Appeals or complaints against our operation of this Customer Engagement Strategy will be processed through the association's complaints handling procedure, which is available at the associations office or on our website.

10. Equalities Commitment

- 10.1 Cloch Housing Association Ltd is committed to tackling discrimination on the grounds of sex or marital status, racial grounds, or grounds of disability, age, sexual orientation, language, social origin, or of other personal attributes, including beliefs or opinions, such as religious beliefs or political opinions.
- 10.2 Cloch seeks to embrace diversity, promote equal opportunities for all and eliminate any unlawful discrimination in all areas of our work.

11. Customer Engagement Strategy Review

- 11.1 This Customer Engagement Strategy will be a working document subject to continuous review. It is supported by an action plan (to ensure it is meeting evolving objectives and achieving associated targets).
- 11.2 We will involve our customers in the review of this Customer Engagement Strategy and annual action plan through customer surveys and meetings with community groups, where possible. When reviewing the Customer Engagement Strategy, we will give due consideration to whether the methods of engagement with our customers are delivering our objectives and leading to improvement in our services and neighbourhoods. We will check this information with our tenants in our tri annual customer satisfaction survey.
- 11.3 This Customer Engagement Strategy will be reviewed every three years, unless amendment is prompted by a change in legislation, operational requirements or customer feedback.

12. Customer Engagement Strategy Availability

- 12.1 This document can also be provided in large print, braille, audio or other non-written format and in a variety of languages, on request.