



Customer Involvement Strategy

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Tenant
approved



1. Introduction

Welcome to Southway's first Customer Involvement Strategy.

In this document you will find;

- What we mean by customer involvement
- What we want it to achieve – our objectives
- How we will deliver high quality customer involvement, by:
 - (i) developing and supporting a 'menu' of involvement opportunities that will encourage all our customers to get involved in shaping what we do and how we do it
 - (ii) providing high quality support to all our customers to help them take advantage of those opportunities
- The standards for customer involvement we will work to and how we will monitor our performance against those standards
- How we will assess what resources we need to devote to achieving and maintaining high quality customer involvement

This strategy document replaces the 'Tenant, Residents and Leaseholder Consultation and Involvement Policy' adopted before transfer.

1.1 A Three Year Strategy

This is a strategy for the next three years (2008-2011). We will review it formally every 12 months over that period. But we will keep under constant review how well the detailed day-to-day operations of Southway's customer involvement are working. And we will look to make changes to it, where necessary, as part of our commitment to continuous improvement.

2 The Background to this Strategy

2.1 Southway's Vision and Objectives

Southway's approach to customer involvement follows directly from our 'Vision' and its 'Objectives', as follows:

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Our vision

We will work in partnership with others to make south Manchester a place that people are proud of - a safe place where people choose to live, work and play.

We will:

- Be warm, welcoming and accessible to every customer;
- Provide excellent services;
- Provide affordable, high-quality, secure homes;
- Help to create a cleaner and greener environment.

Our objectives

- People are confident and proud of the community they live in. They respect one another and are encouraged to realise their potential.
- Our staff are trusted to do the right thing - they are enthusiastic, skilled and willing to go the extra mile for customers.
- Our customer services are excellent, and meet our customers' needs and expectations. We listen to and respect our customers, dealing with enquiries in a helpful and friendly way.
- We care about our local communities. We develop strong partnerships to support them, helping to improve their neighbourhoods.
- We are open and accountable to our residents. We consult and involve them before we make plans and decisions, making sure they are involved from the start.

We see achieving high quality customer involvement as an essential part of realising our vision and of delivering our objective. It is the connecting thread that runs through them both, and is at the heart of what we are, and what we do, as a social landlord.

2.2 The Regulatory, Inspection, and Best Practice Framework

In developing and delivering our approach to customer involvement we will draw both on what we are required to demonstrate as a Registered Social

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Landlord (e.g. in the Housing Corporation's 'Regulatory Code and Guidance') and what we believe to be best practice in our field.

2.2.1 Regulation

We will ensure that our approach to customer involvement will be fully compliant with the following sections of the Regulatory Code and Guidance:

Properly Governed

Sections: 2.3. 2: 2.3.3: 2.5.1 : 2.5.2: 2.5.3 : 2.5.4

Properly Managed

Sections: 3.1b; 33.1: 3.5a: 3.5b

As a recent Stock Transfer Association we also have an additional requirement to demonstrate to the Housing Corporation that we are delivering on our transfer promises¹. This requires us to monitor our performance against our pre-transfer promises in 6 areas;

- **Delivery of home re-improvements**
- **Service improvement**
- **Affordable rents**
- **Tenant involvement in decision making**
- **Regeneration**
- **Delivering sustainable communities**

2.2.2 Inspection

A very important source of guidance for us in achieving high quality customer involvement is the Audit Commission's Housing Inspectorate 'Key Lines of Enquiry'. These provide the basis for inspections of all social landlords.

We know that we will be inspected on the basis of 5 criteria:

- **Access, customer care, and user focus**
- **Diversity**
- **Resources for Resident Involvement**
- **Impact of Resident Involvement**

¹ These requirements are set out in 'How we Regulate : New Stock Transfer Associations (note 8) ' Housing Corporation March 2007

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- **Value for Money**

We intend to use the KLOE guidance not simply to help us prepare for inspection but also to help us understand how we can become 'excellent' at customer involvement.

2.2.3 Best Practice

We know that developing and delivering high quality customer involvement is not about re-inventing the wheel. There are many examples of ideas and activities in social housing that we can draw on and adapt for our own use.

In terms of **ideas** there are a number of guides and publications that we have drawn on to produce this strategy and which will continue to inform our work on customer involvement.

The principal ones are;

- **“People First: Delivering change through involvement”** (Housing Corporation 2007)

This is the Corporation's current resident/customer involvement statement. It identifies, amongst other things:

10 **'basic building blocks'** of resident involvement' (e.g. ensuring equal opportunities for involvement, developing a resident profile, etc.)

and

8 **'key outcomes'** of involvement (e.g. increased transparency of decision making, improved community cohesion, improved and/or more responsive services, etc.).

We will work to ensure that our approach to customer involvement is fully consistent with these ideas.

- **'Improving Services through Resident Involvement'** (Audit Commission 2004)

This report identifies direct business 'gains' from genuine customer involvement. These include impact on: performance indicators; services; the relationship with contractors; accountability; the staff / resident relationship; public relations; and the design of houses.

We will draw on much of this to help assess how well our system of customer involvement is working and to plan any changes we need to make to it.

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- **‘What Tenants Want’ (Tenant Involvement Commission 2006)**

This report concludes that customers want four basic things from their housing association:

1. **get the basics right and go the extra mile**
2. **give us a choice**
3. **make involvement personal**
4. **be accountable.**

It also has a 10 point plan (called a ‘Customer First Plan’) which asks associations to give specific pledges in relation to services (e.g. ‘tenants can readily find out how well their housing association is doing relative to others and how well it is delivering services to different groups of tenants’) and ‘accountability’ (e.g. ‘the association puts tenants at the heart of what it does by setting corporate objectives and business plans that incorporate their concerns and priorities).

We will deliver customer involvement in the spirit of the ‘What Tenants Want’ report (and have already incorporated one of its key principles – going the extra mile – in our statement of objectives see 2.1 above).

But in addition to drawing on key publications about best practice we will also draw on our knowledge of social landlord activities and examples of good work actually done.

Two of the areas on which we will draw are;

- **Benchmarking and Practice Sharing**

We intend to identify other social landlords with whom we can establish a common data bank of good customer involvement practice and with whom it may be possible to develop a mutually beneficial system of customer involvement benchmarking.

- **Recognising our roots**

We came out of the Manchester City Council Housing Service and are proud of our roots. So we intend to retain and further develop some of the ‘tenant participation’ practices pioneered by the Council, and originally delivered via its Tenant Participation Unit (particularly in relation to support for tenant and resident organisations).

2.2.4 Defining Customer Involvement

Finally, in order to say convincingly how we will deliver high quality customer involvement we need to say what we mean by it.

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The definition we have adopted in this strategy is simply that recently developed by the Housing Corporation (in its 2007 'People First' document).

This says:

“ When we refer to involvement we mean:

- **all of the activities and processes that a housing association undertakes that help it know what its residents and communities want;**
- **all of the activities and resources that enable people to be involved, if they want to;**
- **all of the activities that enable residents and communities to have more influence over decisions when they want it;**
- **the framework within which involvement is delivered (e.g. the Involvement Statement and Impact Assessment).”**

By adopting this definition we are including within it all the policies and actions that used to be described as 'tenant participation' or 'resident involvement', but taking the process much further.

'Customer Involvement, for us, is the process through which all Southway residents have the opportunity to influence both our service delivery and our policy formulation. It is a fully inclusive process that creates involvement opportunities for all (not simply for 'tenant / resident representatives').

2.2.5 Fit with 'Customer Care' and 'Equality & Diversity'

As described in the Introduction to this strategy document, our approach to customer involvement clearly links to, and has many overlaps with, both customer care policies and practices and equality and diversity policies and practices. That is:

- **Customer Care** is about how we treat our customers as we deliver services to them, and how we develop and change those services in response to what our customers tell us.
- **Equality and Diversity** is about how we ensure that we understand and meet the diverse needs of our customers and ensure fair and equal access to those services irrespective of age, gender, ethnicity, sexual orientation, disability, faith or religious belief, or their willingness to get involved in formal representative structures, and so on.
- **Customer involvement** is about how we involve our customers in shaping the planning and delivery of those services, and how we run ourselves as a Housing Association. It is also about how our customers help us ensure that we both identify and meet the diverse

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needs of the Southway Community not just as they are now, but as they may become in the future as our neighbourhoods, and our city, develop and change.

Diagram 1 below summarises that relationship

Diagram 1

Customer Involvement



3. Customer Involvement Objectives and Principles

3.1 Our Customer Involvement Objectives

The purpose of our customer involvement system is to;

1. Help ensure we are an organisation that understands, listens, and responds quickly and effectively, to our customers.

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2. Offers, and constantly supports, opportunities for our customers to influence what we do and how we do it –across all areas of Southway’s work - in ways that suit their diverse needs and backgrounds.
3. Help us work in a way that is open and transparent to our customers (and to other stakeholders)
4. Help ensure that we work in a financially efficient way so that we can re-invest the benefits that come from those efficiencies in more, and better, services.
5. Support our customers in further developing their skills and capacities so that they can better access opportunities for training, employment, and / or make a contribution to their neighbourhoods, and to the city.
6. Make a contribution to building good relations amongst our customers, and between our customers and the wider neighbourhoods and communities in which they live. “

3.2 Principles

You will see in Section 4 our ‘menu’ of involvement opportunities.

We have derived the menu from a set of 3 key customer involvement principles (CIP), which are as follows ;

CIP1 We will offer both formal and informal methods of involvement

We recognise that different customers will have different amounts of time to devote to involvement, different interests in it, and different expectations of what it can achieve.

Our menu will recognise this by offering both **formal** and **informal** methods of involvement. The split between them is not a hard one, but in general terms **formal involvement** will usually commit the customer to an activity that requires a specific time commitment or to work within an activity framework. **Informal** involvement on the other hand will, have a greater sense of temporary or ad-hoc involvement ie. where people can ‘dip in’ and ‘dip out’.

You will see in **Section 5** that some of the involvement opportunities in our involvement menu can be done both formally and informally (e.g IT / Telecommunication techniques)

CIP2 We will offer both individual and collective methods of involvement

We also recognise that whilst some people will be comfortable getting involved by working with others (via what we call **collective** involvement)

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others will choose to get involved by themselves (what we call **individual** involvement) .

Collective involvement will mean being prepared to be in dialogue with other customers and to be prepared to exchange views. It also implies a willingness to try to reach agreement or a consensus with others.

Individual involvement is very much about allowing individuals to have their views heard and without having to discuss or debate them with others.

We recognise that, traditionally, tenant participation has been largely synonymous with various forms of collective involvement. So we are determined to move beyond that. But equally, and although we know that a majority of people will only ever choose to get involved (where they do so) on an individual basis, we are also determined to offer those who will commit to collective involvement a clear and effective role.

CIP3 What customers can influence will reflect the involvement choices they make

As previously stated, our approach to customer involvement will be fully inclusive. That is: we will create opportunities for all customers to get involved.

But in offering those opportunities we want to ensure that people understand that the type, and degree, of influence customers can have is linked to the forms of involvement they choose.

In involvement terms we also want our customers to 'go the extra mile' in getting involved. We believe that being prepared to work with others and share views with them on a reasonably regular basis is such a step, and we want to ensure that there is an incentive to do this.

So, in broad terms, this principle will be:

If people choose **individual** forms of involvement, particularly where these are also informal in nature, they will be able to influence aspects of service delivery as it affects themselves, their immediate household, and perhaps their immediate neighbourhood. They will not generally be able to influence the formulation and development of policy and strategy as it affects all Southway customers.

Where people choose **collective** forms of involvement, then they **can** influence directly both service delivery and policy formulation at all levels of decision making, including the Southway-wide level.

We believe that by adopting this principle we will strike the right balance between (probably the large majority) who will only be prepared to exercise

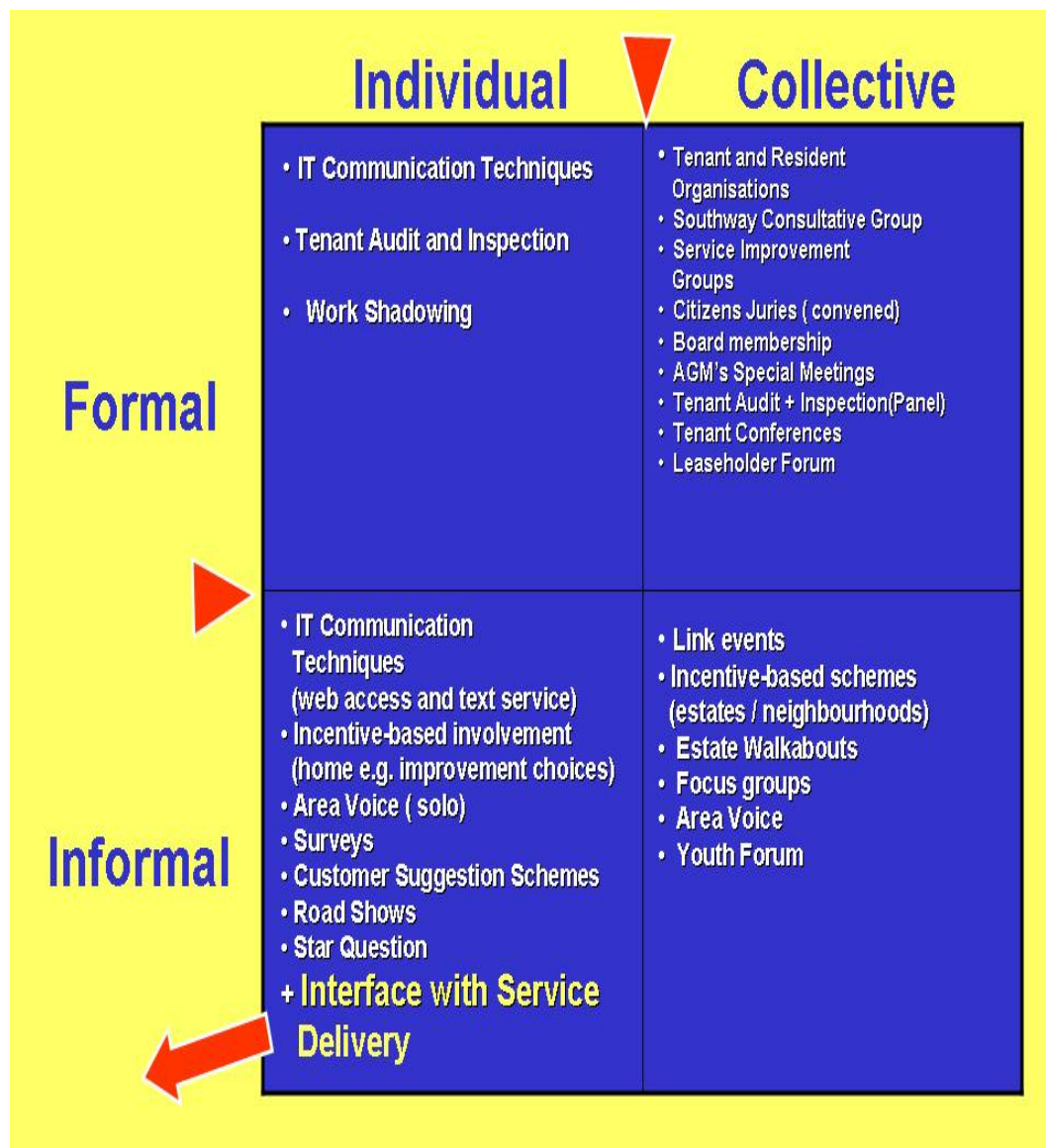
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individual involvement opportunities, and those who will be prepared to work with others for the common good of the Southway community as a whole.

4. Our Menu of Involvement Opportunities

This is summarised in **Diagram 2** below

Diagram 2



We are committed to making all these involvement items available to our customers over the next 3 years.

5. The Southway Customer Involvement Process

We are committed to developing a customer involvement process that achieves two things:

- Helps us to deliver Southway's vision and key corporate objectives, and our specific objectives for customer involvement
- Works in ways that are open, accessible, and transparent, both to our customers and our staff.

We know that simply offering a menu of involvement opportunities will not, by itself, help us realise those two aims.

So we are developing a customer involvement structure whose aim is to show both our customers and our staff what customers can influence and how they can do so.

5.1 3 involvement areas

We want our customers to be able to exercise influence over three aspects of this Association's organisation and activities:

- **Service Delivery**

That is:

what services we deliver; how we deliver them; how well we deliver them; what we might offer in the future

- **Organisation**

For example:

our businesss planning and review process; asset management; risk management; delivery against transfer promises; governance arrangements.

- **Policy and Strategy**

For example

the formulation, implementation, and monitoring of policy; developing a culture of continuous improvement; benchmarking; performance standard development.

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5.2 How can our customers achieve that influence ?

5.2.1 The Board

We are committed to ensuring that customers have direct representation on our major decision-making body by reserving 4 places for tenants on the Board.

We recognise that tenants who sit on the Board are not 'delegates' with a direct mandate to speak or vote in a certain way. They are directors of the company with legal and other responsibilities to the organisation. So we will ensure that all our customers and staff are aware of this, and we will support those directors with training and advice to help them sustain, and flourish in, that role.

It is the Board that has ultimate responsibility for all of Southway's work and all lines of influence within the organisation ultimately lead back to it. But we want to ensure that we have an involvement system in place which allows our customers real influence over what we do. We want our involvement system to 'push down' as much responsibility as possible to intermediate levels, where the Board acts as a 'backstop' to ensure compliance with its legal and regulatory responsibilities.

The system we have developed to help achieve this is summarised in **Diagram 3** (on the next page). It has been developed around the distinction between 'individual' and 'collective' involvement routes previously described in **Section 4**.

5.2.2 Individual Routes

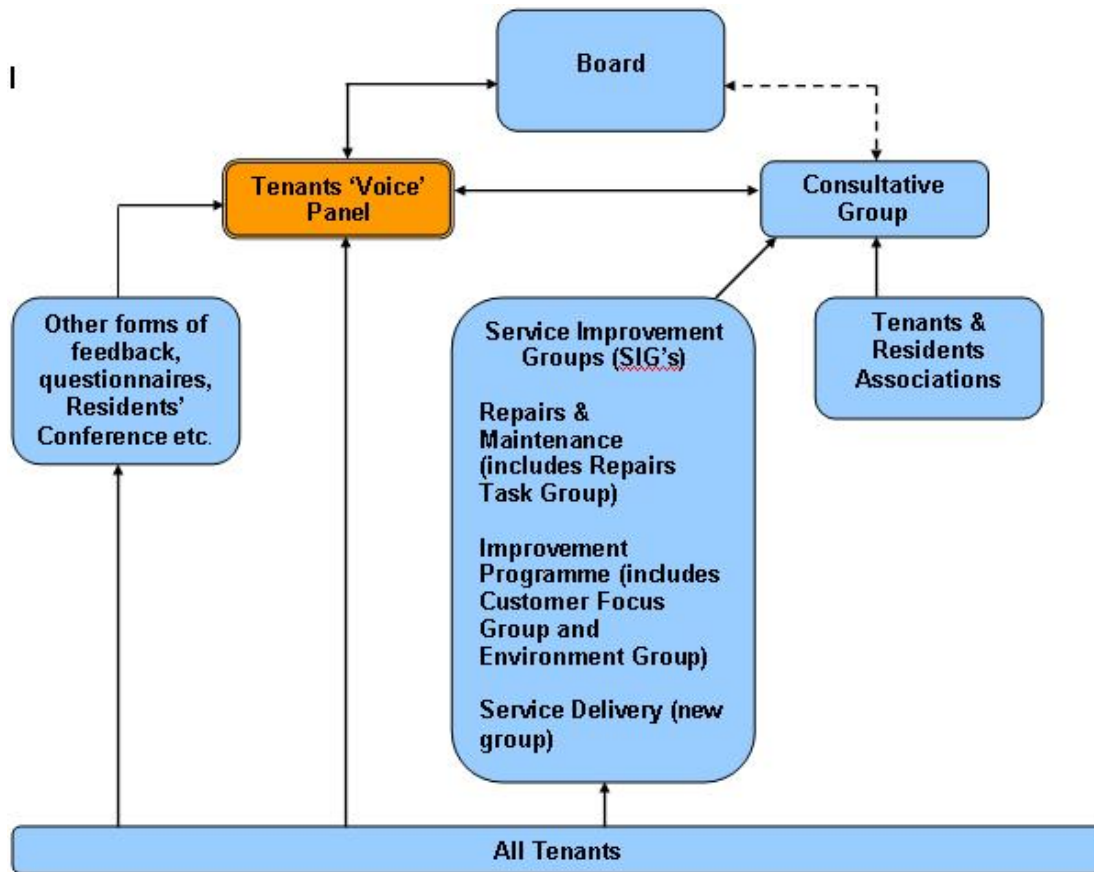
We will introduce, support, and resource all the *individual* activities from within our 'menu' of involvement opportunities, and actively encourage all our customers to take advantage of one or more of them.

This will produce a flow of ideas, information, requests, and comment. To handle that, and ensure that all these responses are fed into the work of the organisation, we will develop the following structure:

- **The Customer Involvement Team and Support Staff**

This team will have initial responsibility for organising the menu items and collating / analysing the results. They will also have responsibilities for feeding these into, and supporting and servicing, the Service Improvement Groups (see below).

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- **Service Improvement Groups (SIGs)**

We will develop 3 Service Improvement Groups :

Repair and Maintenance

The Improvement Programme

Service Delivery

Each of these will have a membership of customer representatives recruited from amongst all Southway residents plus staff members with responsibility for, and expertise in, this function.

These groups will influence improvements to the way the services are delivered and customers will see their input being turned directly into results.

5.2.3 Collective Routes

We are committed to offering customers who are prepared to work with others collectively to shape our work the opportunity influence in all three areas (service delivery, organisation, and policy and strategy).

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- **The Customer Involvement Team and Support Staff**

This team will have initial responsibility for organising the menu items and collating / analysing the results.

- **Voice Panel**

The Voice Panel is a group of tenants and residents who will help to decide how Southway Housing Trust should do things.

The Panel will make sure that Southway has regular feedback about how local people see the services it provides.

The Panel will also say how services and neighbourhoods should be improved.

The Southway Board will respond positively to recommendations from the Panel whenever possible.

Each Panel meeting will concentrate on one main issue or service area and will:

- Check the quality of services
- Tell the Board about ways in which services should be improved and about any gaps in services
- Provide information, based on local experience, about how better value for money can be achieved
- Put ideas to the Board about how Southway should work with other agencies to improve life in our neighbourhoods

Ideas, suggestions and proposed actions from the Panel will be referred directly to the Southway Board for their consideration.

- **Tenant and Resident Associations**

Where these exist, we will discuss with them all the results of involvement activities that are specific to their area

We recognise and value the work of formally organised Tenant and Resident Associations. We will continue to support all existing associations financially, and with other support, that meet our recognition criteria. We will keep under review the resources we devote to it but will aim to meet best practice standards for comparable organisations.

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We will also work to develop new associations, where residents want it.

We see the specific role of TARAs to be the following;

- 1. To be the ‘eyes and ears’ of local neighbourhoods on local issues**
- 2. To be the organisations with whom we will develop local compacts (neighbourhood strategies with specific, local actions) and which we will resource and support to be the principal stakeholder for the delivery of those compacts.**
- 3. To liaise with the CI Team and Support staff on the results of the collective involvement menu, as it affects their area**
- 4. To liaise with the 3 Service Improvement Champions on the results of involvement activities, as it affects their area.**

- **The Southway Consultative Group**

We will continue to recognise the SCG as the principal, formally organised forum that brings together customers, Board members, local councillors, and other stakeholders.

It will continue to act as the most important Southway-wide advisory group and will be properly resourced to play that role.

Over and above what it did in the immediate pre and post transfer era, we see the SCG playing an increasingly important role, beneath the Board, in acting as the guardian of our customer involvement commitments.

Its specific roles will be to ;

- 1. Act as the co-ordinating body for all customer involvement activities**
- 2. Receive and act upon an agreed set of delegated powers from the Board in respect of customer involvement**
- 3. (On the Board’s behalf) monitor delivery on transfer promises from a customer involvement perspective (using Communities and Local Government (CLG) template)**
- 3. Set and monitor the customer involvement performance standards, set targets, develop performance indicators, and monitor performance against those targets**
- 4. Be responsible for overseeing how the results of all the customer involvement activities are fed-back to all customers on a regular basis**

Membership of the SCG will be as follows ;

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- Up to 14 places for Southway tenants

up to 7 of whom will be nominated from recognised Tenant and Resident Associations (as the number of Associations increase there will need to be discussion amongst them as to how these 7 places are allocated);

up to 7 of whom shall be directly elected from amongst Southway tenants as a whole;
- 2 owner occupiers to be directly elected by owner occupiers;
- 1 leaseholder representative to be nominated by the Southway Leaseholder Forum;
- 2 Local Ward Councillors, one from each political party within the Southway area. The political party is to have the option of rotating who attends (as amended May 2008);
- Other agencies, Southway officers, and specialist advisors may be invited to attend meetings where appropriate.

As has been the practice since the SCG was first established, only tenants, owner occupiers, and leaseholders will be able to vote on matters requiring a vote.

The Chair will be elected from amongst the tenant members. The term of office of the Chair will be 3 years. All residents /tenants on the SCG will serve for up to a maximum of two consecutive terms of office i.e. no more than 6 consecutive years.

6. Assessing Impact

6.1 Assessing Impact

We have adopted the principles of involvement impact assessment set out in the Corporation's 2007 document; 'Measuring Change'

We are therefore committed to a comprehensive and regular process of impact assessment which will move through the following stages ;

1. Identify our priorities

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2. Review and adapt that strategy

(we have done both of these following an external review of our involvement strategy in 2008)

3. Develop our specific outcome objectives

(these are summarised in **Section 3.1** above)

4. Developing an action plan

5. Decide and agree measures

(these are described in 6.2 below)

6. Deliver our action plan

7. Assess and communicate the impact of involvement

(we have given both of those responsibilities to our Southway Consultative Group as shown in **Diagram 3** and as described in **Sections 5.2.2 and 5.2.3 above** .

8. Scrutinise impact

(and it is the Board, in consultation with our customers, staff, and partners and stakeholders, who will do this.

6.2 Establishing Standards, Targets, and Indicators

We will adopt;

Performance Standards that place us in the top quartile of involvement performance for comparable RSLs

Performance Targets that are consistent with those standards, and which will require us to look for ways of continuous improvement in this important area of our work

Performance Indicators that give us not simply an overview of how well we are doing but will enable us to benchmark our involvement work against other comparable RSLs.

To achieve this aim we have become part of the 'HouseMark' resident involvement benchmarking network.

7. Resources for Customer Involvement

7.1 Introduction

The May 2008 external review of the resources we devote to customer involvement concluded that our involvement budget compared favourably with existing cost benchmarks .

But it drew attention to two weaknesses ;

- We did not support our specialist involvement staff with a high enough level of generic staff support
- We did not devolve responsibility for control of that budget to our customers

7.2 Supporting Customer Involvement

Our strategy for ensuring that we devote the proper level of resources for customer involvement is as follows;

- We will fix a budget annually for customer involvement that reflects progress towards the achievement of our 6 involvement objectives
- That budget will reflect not only the 'on costs' of involvement (i.e costs exclusive of staff salaries) but an indicative 'true cost' budget which captures all our costs
- This budget will be prepared and monitored by the SCG
- To ensure we are devoting the right amount of resources to involvement we will benchmark these costs along the lines described in **Section 6.2** above
- We will require the SCG to devolve responsibility for control of the on-costs budget to customers via the Service Improvement Groups, our tenant and resident associations, and through discussions with customers on the SCG itself.

8. Contact

If you wish to discuss the contents of this Strategy please contact the Customer Involvement Team on 0161 448 4229 or email us at Connect2southway@southwayhousing.co.uk