



Tenant Scrutiny Panel Report

**CUSTOMER RECRUITMENT AND INVOLVEMENT.
THE GOOD, THE BAD, BUT NEVER THE UGLY**

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Introduction

Who we are:

We are the Tenant Scrutiny Panel, known as 'Spanners', made up of 3 tenants and chaired by Roger Pell.

'Spanners' stands for:

- Scrutinise
- Performance
- Analyse
- Negotiate
- Network
 - Evaluate
 - Report
- Support

What we do:

We investigate selected topics and report recommendations to the Housing Review Board on our findings. Whilst we are independent of the council, we liaise with officers and tenants to gain information. This enables us to give a balanced perspective to support the Housing Service to regulate and improve its performance.

Why we chose to scrutinise East Devon's tenant involvement process:

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To promote new thinking in order to re-energise tenant /customer involvement

How we did our investigations

We developed a plan¹ (scoping paper) which outlined the areas to explore and set boundaries around the topic to make sure we stayed focused.

This involved looking at:

- Corporate approach versus reality
- Recruitment and involvement approaches
- Communication and language
- Effectiveness of involvement

Exceptions included:

- Housing Review Board
- Councillors

Desired outcomes:

- To obtain a good picture of the:
 - Effectiveness of arrangements/communication
 - Value that involvement brings
- And also identify:
 - what works well
 - any improvements that can be made
 - ideas to motivate non-involved tenants

¹ See Appendix A

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What we did:

- Collated, read and analysed documents from East Devon plus literature from other housing organisations.
- Undertook a survey of East Devon Housing staff (42 out of 105 staff members responded, although not every respondent answered every question)
- Observed other East Devon groups (including community groups)

What we looked at:

- Other housing providers' – Spectrum, Exeter, Mid Devon, Cornwall leaflets and strategies as a comparison
- East Devon literature, including STAR Survey; Getting Involved With The Housing Service leaflet; Tenant and Council Partnership Statement; Tenant profile (CORE); Annual report to tenants; Participation/Involvement Plan 2014-16; Housing Services Planning 2012-13; Resident Involvement Strategy 2013
- General literature, including Homes & Communities Agency's Tenant Involvement and Empowerment Standard/Co-regulation; Tenant Services Authority/Audit Commission's Tenant Involvement – assessing landlord's progress; TPAS best practice in tenant involvement

Copies of all our findings can be found in our evidence box file.

This scrutiny investigation took us 18 months to complete. All recommendations are based on evidence provided by staff and tenants. **It may be that there is information that we were not made aware of, which may impact on our findings.**

What we found

20 tenants were involved in 17 different groups (many getting involved as a result of a grievance). This reduced the pool of information and ideas available and the apparent lack of formal links or feedback between the groups resulted in stagnation, producing little in the way of results (with a few exceptions).

There was a disappointing response to the anonymous housing staff survey – 42 staff members (out of 105) responded. Not all answered every question. Results showed that although some staff are very committed to tenant involvement, others don't recognise its value (or feel it forms – or should form - part of their normal working day).

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Staff attitude can come over as 'you're just a tenant, you're lucky to have a home'. We agree with the Head of Housing that by considering and referring to tenants as 'customers', the culture would change to one of increased mutual respect.

What works well:

- The Housing Matters magazine – because it now uses clear language, is more user friendly and looks like a magazine rather than a news sheet or paper. It involves a really active tenant group but they are still led by the council's design team
- Improving Facebook and Twitter content (has become increasingly proactive in last 18 months)
- Access to training to boost customer involvement skills, including access to life skills training
- Verbal commitment to customer involvement from senior staff – but this doesn't seem to have filtered down to other staff in practice
- The designated Complaints Panel is working well and seems to be thriving. It has one of the committee taking minutes; they appear to be listened to; they achieve good outcomes; driven by tenants (although this would benefit from greater complainant feedback – not all complainants respond); good liaison with council groups. *Disappointingly, we have recently been told this positive start has faltered and that staff supporting this group are currently seeking to build it back up again*
- The Estate Management Service Review Group have adopted a new format and seems to be moving in a positive direction. They are doing some good practise things eg promoting what they want to achieve in Housing Matters; good interaction between tenants and staff; wanting to get closer to tenants – and we look forward to seeing some positive outcomes from this group

What doesn't work so well:

- The Council's approach is seen as dictatorial and officious. There's no feeling of 'participating' or partnership in decision making (despite this being part of the Tenant & Council Partnership Statement). Tenants are told what the decision is, then asked for comment, rather than being part of the decision making process itself eg unfinished meetings that still resulted in non-agreed outcomes; closing the Tenants Resource Room and relocating this to Trumps Court; cancelation of Service Review Group meetings. There is a feeling that tenant groups are set up for the convenience of the council rather than tenants with tenants not treated as true partners

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- The use of % in performance/satisfaction reporting does not provide a real picture. Actual numbers would be a better way of creating a true and clear picture, easily understood by all.
- Employing another full time person in customer involvement to support the current role, which gets bogged down with administering to the groups. This needs to be increased in order to constantly regenerate customer involvement – and to give this the time that is needed to do this successfully
- Process of agreeing change from TRG to TIF. No apparent agreement had been reached after the initial discussion. It was agreed to call another meeting but the decision was ‘made’ internally, without this. More needs to happen, a name change and some tweaking is not sufficient to change culture /direction of a group

Our recommendations

RECOMMENDATION ONE			
	Further details	Evidence	Priority 1 Priority 2 Priority 3
1.0	Make sure that effective tenant involvement (with a customer-centric approach) is an expected part of everyone's job		
1.1	Make sure all staff understands the purpose and value of involvement and the role they play in making this happen. This will help to remove the perceived 'brick wall' between tenants and the Council	Staff survey	
1.2	Set targets for staff around Customer involvement (as appropriate to their role) and measure progress against this. Discuss this as part of staff appraisals and provide training as appropriate	Staff survey ² : 7 said customer involvement was part of their annual performance review. 11 said it was not.	

² 42 staff members (out of 105) responded to our anonymous survey

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		<p>Staff survey: 23 said involving tenants is important, 12 said it was not important and 5 said they didn't need to involve tenants.</p> <p>Staff survey: 17 said it was easy to involve tenants, 19 said it wasn't easy and 4 said they didn't need to involve them at all.</p>			
1.3	<p>Change staffs' thought process and attitude by seeing tenants as 'customers'. This will change perspective and encourage a culture of more mutual respect. Include this in staffs' job descriptions</p>	<p>Staff survey: 18 said tenant involvement was part of their JD, 14 said it was not</p> <p>Head of Housing said it was part of his role to encourage staff to see tenants as customers (email response)</p>			

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1.4	Work with the TIF to produce an annual programme of policy reviews/strategy development to be shaped in partnership with customers – and how they should be involved in these (eg focus groups, service review group, survey, TIF) – and make sure reports to HRB on such policies/strategies show what is being done differently as a result of customers' input	Staff survey: 28 said that tenants' views should be considered when making service delivery changes. 9 disagreed with this			
1.5	Involve Customers in setting service standards and how housing-related decisions are made; ensuring a focus on value for money (right services to right people at right time at right cost = efficient delivery)	Other landlords			
1.6	Involve Customers in local decisions in communities (increases customer satisfaction, lowers ASB, creates greater pride in area)	Other landlords			
1.7	Monitor performance annually against the Tenant and Council Partnership Statement, signed by EDDC and HRB and report on this to Customers in the annual report.				
1.8	Work with Customers to review the Tenant and Council Partnership Statement to ensure it includes the key commitments that need to be jointly delivered and reflect customers' needs and priorities. Include TIF as a signatory to reflect the tripartite responsibilities of this statement				

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RECOMMENDATION TWO			
Make sure tenant involvement priorities are linked to the organisation's vision and objectives			
Further recommendations	Evidence	Priority 1	Priority 2
		Priority 1	Priority 3
2.0	Make sure tenant involvement priorities are linked to the organisation's vision and objectives		
2.1	Work with Customers to develop a 'road map' to developing a true partnership relationship with tenants and to remove the feeling that 'tenants are expected to fit in with the council'		
2.2	Work with Customers to agree the ways in which they can influence the HRA Business Plan, making sure that the priorities for tenant involvement flow from this, supporting Customers to be involved in key issues and objectives affecting them and the business. Include this in the business plan itself		
2.3	Work with all involvement groups to develop annual work plans for each group to ensure their priorities are met (and thereby supporting the HRA Business plan). Combine these into a collective annual Customers involvement work plan and report against this quarterly to the HRB and tenants via the web site or newsletter		
2.4	Involve Customers in decision making at an early stage (not after decisions have been made) – and make sure papers to HRB show the contribution and changes that have been made as a result of their involvement		
2.5	Involve Customers in designing and reviewing agreed policies and strategies from the outset and make sure papers to HRB show the contribution and changes that have been made as a result of their involvement		
2.6	Make sure the Customer Involvement Strategy clearly links to the HRA Business Plan (and any other corporate objectives)		

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2.7	Ensure that involving customers is seen as an active part of business development, service planning and budget setting. This should be monitored by a senior manager and reported annually to the HRB and to tenants in their annual report	HCA Standards TPAS best practice in tenant involvement			
2.8	Make sure the Customer Involvement Budget meets the needs of the collective annual customer involvement work plan	HCA Standards			
2.9	Report back quarterly to the TIF on the spending of this budget so that they can monitor this and ensure it is being spent correctly – and report annually to other tenants via the annual report)				
2.10	Develop a way to measure the value for money created (or not) by Customer involvement to show how involvement has influenced and benefitted the business as well as tenants generally. Report on this annually to HRB and tenants in the annual report				

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RECOMMENDATION THREE					
		Evidence	Priority 1	Priority 2	Priority 3
3.0	Make customers central to decision making processes				
Further recommendations					
3.1	Actively seek out Customers' experiences of service delivery so that you are aware of the impact your services and service delivery has on them. Don't just rely on things like Contractors' reply slips				
3.2	Trial Customer Experience Mapping, informal focus groups and continue to develop online/social media opportunities				
3.3	Make sure Customers' feedback gathered in these ways is reported to HRB so they can ensure agreed recommendations are fed into service improvement planning				
3.4	Make sure this process is transparent by summarizing this feedback in Housing Matters magazine, Annual report plus web site/social media				
3.5	Look at current feedback opportunities (eg repairs satisfaction survey) and work with the Editorial Group (and other interested tenants) to ensure they include questions that customers wish to answer as well as those East Devon Homes wishes to ask				
3.6	Ensure groups are empowered to make a difference and their life skills and expertise are respected and utilised				
3.7	Make sure Customers are given high quality (and timely) information (including access to independent advice) as well as access to training and support				
3.8	Support Customers to be able to 'challenge' East Devon effectively as 'critical friends'. Support staff to understand this is about improving services and is not personal				
3.9	Get positive stories out in the annual report, web site, newsletters, events and via staff and involved residents				

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3.10	Develop ways of involving Customers who are not able to engage with traditional methods of involvement eg tenants with care and support needs					
3.11	Check to make sure customer involvement activities do not exclude any customers and are open to all					
3.12	Include options for on-line involvement, either as stand alone or feeding into other groups					
3.13	Remember a week has seven days with 24 hours in each. Extend activities to include evenings and weekends					
3.14	Promote the benefit involvement can have for Customers eg using life skills, gaining confidence, learning new skills, helping with access to education/employment (looks good on your CV); getting out and meeting people					
3.15	Collect Customers' areas of expertise at sign up (or just after) and encourage them to use these skills as an active tenant.					
3.16	Find out which communication methods Customers prefer to use – and use these to communicate with them					
3.17	Employ another full time Customer Involvement person to support the current role which gets bogged down in administering to the groups. In this way, one can focus on promoting and developing effective Customer Involvement, whilst the other can focus on admin					

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RECOMMENDATION FOUR			
Review the existing structure to ensure groups' effectiveness, including no duplication of members/activities			
	Evidence	Priority 1	Priority 2
		Priority 1	Priority 3
4.0	Further recommendations		
4.1	Use the planned recruitment drive to ensure new members are brought into relevant groups and activities		
4.2	Empower staff and Customers to work together to agree which/how many groups are needed to support staff to shape and improve service delivery, including agreeing service standards and any local offers. Ensure no duplication of activity		
4.3	Make sure this includes a range of ways (and times) for Customers to scrutinise, monitor, decide, influence, comment and feed back in a way that works (so keep trying things out and assessing how well each works). Sell the 'sizzle' (the difference tenants can make)		
4.4	Develop a clear tenant involvement structure with efficient communication flows, which offers a range of methods to collect and use tenant feedback eg informal as well as formal complaints; snap shot surveys; question of the week etc. Have options that can be completed from the time it takes to boil a kettle to influencing strategic priorities. Include time frames (eg 1 hour every month, email once a week, ½ hr every 3 months)		
4.5	Ensure each group is supported by a dedicated staff member who can support the group to be effective (rather than 'run' the group), provide information, find papers, take notes etc according to the needs of each group and to be a "friendly voice/face "		
4.6	Allow for one-off groups (working parties) to develop as staff see the need for them (eg when reviewing a policy or /developing a		

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	new strategy				
4.7	Work with tenants to change tenant group names to sound positive and reflect their role (de-councilise description to something more meaningful to tenants)				
4.8	Use technology (email, facebook, instagram, twitter, skype etc) to facilitate easier contact between Customers and Customer groups (and council). Replicate this in Housing Matters as far as possible.				
4.9	Develop a Customer Involvement Update web page for groups to inform tenants of their activities. Make it possible for Customers to contact groups via this page. Replicate this in Housing Matters as far as possible				
4.10	Restrict the number of groups Customers can be members of, to encourage diversity and increased representation	Staff survey: staff thought there were too many groups with the same tenants sitting on them – and are not representative of the tenant population			
4.11	Remember that Resident Involvement leaflets are there to 'sell' resident involvement, so include what's in it for tenants and how East Devon Homes will support tenants involved before listing involvement options; stress that involvement will be appreciated by the council; include time commitment and use appropriate images. All involvement literature needs to be brightened up, with appropriate images (showing a little girl on a balance beam does not equate with Customers becoming more involved)	Spectrum/Cornwall tenant involvement leaflets			
4.12	"De-councilise" all terminology				
4.13	Develop a flow chart to show how communication will work – including decision making and feedback – from customers.				

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through customer groups, to senior managers/HRB and back again			

RECOMMENDATION FIVE

Develop an annual programme of ongoing activities to promote positive recruitment			
	Further recommendations	Evidence	
			Priority 1 Priority 2 Priority 3
5.0	Develop an annual programme of ongoing activities to promote positive recruitment		
5.1	Develop and carry out a range of ongoing (and where appropriate, targeted) recruitment activities to ensure that Customer Involvement continues to grow. Develop these in partnership with existing involved customers. Find out which approaches work best currently		
5.2	Measure the success (or otherwise) of various recruitment approaches eg welcome pack, web site, social media, to see which ones work best across all age groups, customers' families (not just tenants named on the tenancy agreement), geography, gender etc		
5.3	Change the ethos, terminology and approach to see tenants as 'customers' to help reduce perceived 'us and them' culture		
5.4	Promote the (evidenced) success that effective customer involvement has created (using web site, social media and Housing Matters magazine) and ensure that all opportunities for involvement actually make a difference, rather than becoming		

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	'talking shops'					
5.5	Make better use of staff/contractor contact with customers to proactively identify those who may want to be involved. Ensure a robust process is developed to respond to customers identified in this way, so they don't get forgotten					
5.6	Make better use of Social Interaction and Fun Days to identify tenants who might like to get involved. Consider inviting an interesting speaker to coffee mornings or holding events in soft play areas. Work with Customers to develop a range of creative approaches to recruitment and retention of involved tenants					
5.7	Provide stands at conference, fun days and any community activities eg Sidmouth Folk Festival. Talk with people, don't just rely on handing out leaflets. Customers should be invited to man these stands along with staff					
5.8	Research the reasons why customers don't want to get involved/stay involved – and develop strategies, in partnership with Customers, to resolve these					
5.9	Be proactive in consulting with other housing providers to get information on best practice in recruiting and retaining active Customers					

Conclusion

This was our third scrutiny activity and again focussed on a service being provided by the council and taken up by tenants. There was a lot of work involved but we are getting more experienced in the scrutiny techniques needed and are growing as a scrutiny group.

We learned a lot about the challenges involved in delivering this housing service and hope that our recommendations help to address some of these.

We are pleased to find there are positive practices to balance our recommendations. We found the tenant involvement process to be stagnant in places, with a poor attitude and approach whilst growing in others, with a much improved customer-centric attitude and approach. We hope our recommendations will ensure that the positive examples we found can be spread to the rest of the organisation.

To recap, our top five recommendations are:

1. Make sure that effective tenant involvement (with a customer-centric approach) is an expected part of everyone's job
2. Make sure tenant involvement priorities are linked to the organisation's vision and objectives
3. Make customers central to decision making processes
4. Review the existing structure to ensure groups' effectiveness, including no duplication of members/activities
5. Develop an annual programme of ongoing activities to promote positive recruitment

We are pleased to recommend this report to the Housing Review Board.

Acknowledgements

We would like to thank the following for their contribution and support during this project:

- Officers of the council who supported us, allowed us to shadow them and patiently searched for information in answer to our questions
- Tenants, and staff who took part in our surveys and interviews

A special thank you goes to the Tenant Involvement Team and Kerry Spittle especially for their patient help in facilitating this project

Appendix A - Scoping paper

BROAD TOPIC AREA	East Devon's approach to tenant involvement and empowerment and recruitment
SPECIFIC AREAS TO EXPLORE	Corporate approach vs reality Recruitment and involvement approaches Communication and language Effectiveness of involvement
AREAS NOT COVERED	Housing Review Board
DESIRED OUTCOMES	To obtain a good picture of <ul style="list-style-type: none"> • Effectiveness of current involvement Arrangements/communication • Value that involvement brings • Identify what works well • Identify any improvement that can be made Ideas to motivate non-involved tenants

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<p>WHO SHOULD BE CONSULTED TO OBTAIN EVIDENCE</p>	<p>John Golding Jane Reading Bev Anderson Other staff members as required Current involved tenants Ex-involved tenants Non-involved tenants</p>
<p>WHAT EVIDENCE ALREADY EXISTS</p>	<p>Housing and Communities Plan 2012-2016 Resident Involvement Strategy 2013 Various leaflets Website TPAS mini health check Equality Impact Assessment</p>
<p>WHAT EXPERTS ARE REQUIRED</p>	<p>Not currently identified TPAS</p>

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<p>WHAT OTHER RESOURCES ARE NEEDED</p>	<p>Jenny Vernon as required Staff surveys Involved tenant survey Non-involved tenant survey Others as yet to be defined</p>
<p>TIMESCALE INCLUDING START DATE</p>	<p>April 2014 – December 2015</p>
<p>WHO ARE THE RECOMMENDATIONS BEING REPORTED TO</p>	<p>Housing Review Board John Golding Sue Bewes Jane Reading</p>