



HOME'S CUSTOMER AND CLIENT ENGAGEMENT SUB-STRATEGY

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CONTENTS

Executive Summary	3
1.0 Developing an Excellent Customer and Client Engagement Offer	4
1.1 The Context for Customer and Client Relationships	4
1.2 The Operating Environment	4
1.3 Regulation	5
1.4 Links to Other Corporate Strategies	6
2.0 Our Objectives	8
3.0 Our Approach	9
3.1 Framework	9
3.2 Guiding Principles	10
3.3 Menu of Involvement	11
4.0 The Enablers Required	14
5.0 Measuring Success	14
6.0 Cost Profile	14
7.0 Action Plan	15
8.0 Expected Outcomes	15
9.0 Valuing Diversity	15
10.0 Value for Money (VFM)	16
11.0 Monitoring and Review	16
12.0 References and Further Information	17
ANNEX 1: All Home Group Operating Areas	18

EXECUTIVE SUMMARY

This document outlines Home's approach to developing customer and client engagement for the period 2010 – 2015. It sets out how we will prioritise our resources to exert the greatest impact on our customers' and clients' lives and measure and evaluate the outcomes we are achieving.

Home is committed to developing and growing our relationship with customers and clients. This includes tenants, leaseholders, shared owners and care and support clients. This document sets out, in greater detail than the Corporate Strategy, *Opening Doors*, our strategic view for achieving this within Home to ensure that we continuously improve and develop a truly distinctive customer experience. Our objective is to add value to our customers' and clients' lives and the communities that they live in by delivering high quality, value for money products and services which are tailored to meet their needs.

Flowing from *Opening Doors*, we will develop our relationship with our customers and clients through the following four objectives:

Objective 1 – To work with our customers and clients to continuously improve and refine our services and products through our customer and client involvement and consultation approaches.

Objective 2 – To ensure equality of access to consultation and involvement for all our customers and clients

Objective 3 – To continue to develop and embed effective scrutiny and review of our activities through a co-regulatory approach

Objective 4 – To deliver efficient and effective consultation and engagement approaches that have appropriate advice and resources at their disposal

These objectives will be delivered through the provision of a number of different opportunities and mechanisms to be involved in the design and delivery of the services that use. These mechanisms are underpinned by an effective performance management framework, robust information sharing and clear communication channels between customers, clients and Home. The specific actions that will deliver this sub strategy can be found in our operational and service improvement plans.

1.0 Developing an Excellent Customer and Client Engagement Offer

1.1 The Context for Customer and Client Relationships

Home has a broad customer and client base spanning rented, leasehold, shared ownership housing, floating and specialist care/support services. This sub-strategy sets out how Home proposes to work in partnership with our customers and clients to ensure that they are fully involved in scrutinising, reviewing, influencing and supporting Home's service delivery. Changing our relationships with our customers and clients is just the start. We want to do this to achieve the outcomes, products and services that they tell us they want, to provide them with an excellent standard of service and help us to become a top-performing organisation.

Our latest customer profiling information (August 2010) tells us that 25% of our customers and clients want to be involved with the organisation. Furthermore, we hold valuable information into the means by which our customers and clients wish to be involved, engaged or consulted. 49% of our customers surveyed stated a preference to telephone, post, or e-mail questionnaires with the most popular mechanisms being estate walkabout and cleanups (both 21%).

1.2 The Operating Environment

The operating environment for Home has changed significantly over the past year, and will continue to evolve. The policy environment is under radical review by the Coalition Government and we are already experiencing a massive reduction in public finances, increased competition, tighter operating margins, pressure to deliver cheaper services, and more of them for less money.

Central to the thinking of the Government is the concept of the Big Society, in which the Government envisages providing citizens, communities and local government with the power and information they need to come together, solve the problems they face and build the society they desire.

Fundamental to the Big Society is the notion of increased localism with appropriate planning and decision making powers being devolved to communities. It is seen as a culture change where people do not always turn to officials for answers to their problems, but rather have the power to help themselves within their communities. Volunteering, social enterprises and voluntary groups will be actively encouraged to do more to make our society stronger.

Building this society is deemed to be the collective responsibility of every Governmental department, every individual Citizen, and therefore for Home in its entirety. There are three strands of the Big Society agenda:

1. Social action - The Government will foster and support a new culture of voluntarism, philanthropy and social action.

2. Public service reform - To eliminate centralised bureaucracy that wastes money and undermines morale.

3. Community empowerment - To create communities with ‘oomph’, meaning neighbourhoods who are in charge of their own future.

There are potentially significant opportunities for Home to compete for sustained funding through interpreting Big Society for our customers and clients through considering how the key elements of the concept already resonate with our work and strategic intent. To be successful, Home needs to build strong alliances and key partnerships with small local groups, so that we become part of the delivery offer. However, partners need to be carefully and strategically considered as many smaller community-based charities are going to struggle to maintain their future viability following funding cuts.

The key notion of localism is likely to provide a fresh impetus to the concept of Total Place. The fundamental principle behind this approach is the assumption that local government would lead collaborative activities across the public sector in its localities. Local agencies would align, pool or even transfer budgets between them to focus on achieving outcomes for local people and communities.

The new Government is supportive of the principles that underpin Total Place. With a strong emphasis on reducing the public deficit, support and sympathy for any initiative that can eliminate duplication, share assets and reduce costs, especially if also improving outcomes, is likely to be approved of. Total Place pilots have demonstrated that a whole area approach to public services can lead to better services at less cost and the challenge now is to save money by sharing local public services and working in partnership.

The vision of putting customers and clients at the heart of everything we do fundamentally develops our relationship with them and with society – seeing every interaction as an opportunity to engage and positively impact on how customers/clients feel and increase their loyalty to us will enable Home to develop strong and lasting relationships. Home needs to draw on the skills and expertise of customers and clients across the country as collectively we respond to the social, political and economic challenges we face as an organisation.

1.3 Regulation

Our regulators the Homes and Communities Agency (HCA) and the Scottish Housing Regulator (SHR) work across housing associations, councils and Arms Length Management Organisations with the ultimate

aim of making a difference to the ten million people living in social housing.

The mission of the HCA in respect to regulation is yet to be defined however the role of the soon to be abolished (2012) TSA is to improve standards for tenants and create an appropriate degree of protection and choice and this is achieved through their six standards. This approach is largely expected to continue. The HCA will assume responsibility for both economic and financial regulation and this is expected to be enacted through the Localism Bill (November 2010). The HCA is looking to uphold the principle of co-regulation and their standards will be balanced with a locally tailored offer. Locally these are proposed to be based on the themes of home, neighbourhood and community and involvement and will be developed in partnership with our customers and clients. Whilst the remit and role of the HCA will develop over time, Home in England continues for the foreseeable period to be guided by the principles of the TSA in its approach to governance and regulation.

The purpose of SHR is to protect the interests of current and future tenants and other service users, ensure the continuing provision of good quality social housing, in terms of decent homes, good services, value for money, and financial viability and maintain the confidence of funders. This is underpinned by the five principles of accountability, transparency, targeting, consistency, and proportionality in their approach to regulation.

1.4 Links to other Corporate Strategies

The objectives of this sub strategy have not been developed in isolation. The objectives and key performance indicators flow from Home's overarching strategy *Opening Doors*.

Home also recognises that the objectives in this sub strategy cannot be delivered in isolation and elements of delivering the objectives will be done so through a joined up approach throughout the organisation. To this end we have five other corporate sub strategies that enable the delivery of *Opening Doors*. These are the:

- Neighbourhoods
- Housing
- Care and Support
- Enterprise and Development
- Housing and Office Asset Management

The delivery of the objectives in this sub strategy will be monitored and measured through Home's Operational Planning framework. The Operational Planning framework, detailed in *Figure 1* below, itemizes how these individual elements come together to enable delivery.

Recognition Events

To understand the successes we have and ensure we are delivering our anticipated outcomes, Home challenges its service delivery through the use of Recognition Events (REs). REs enable Home to understand the outcomes it requires (Show Me) and then undertake planning to ensure the steps to successful delivery are understood, measured and achievable in the work we undertake.

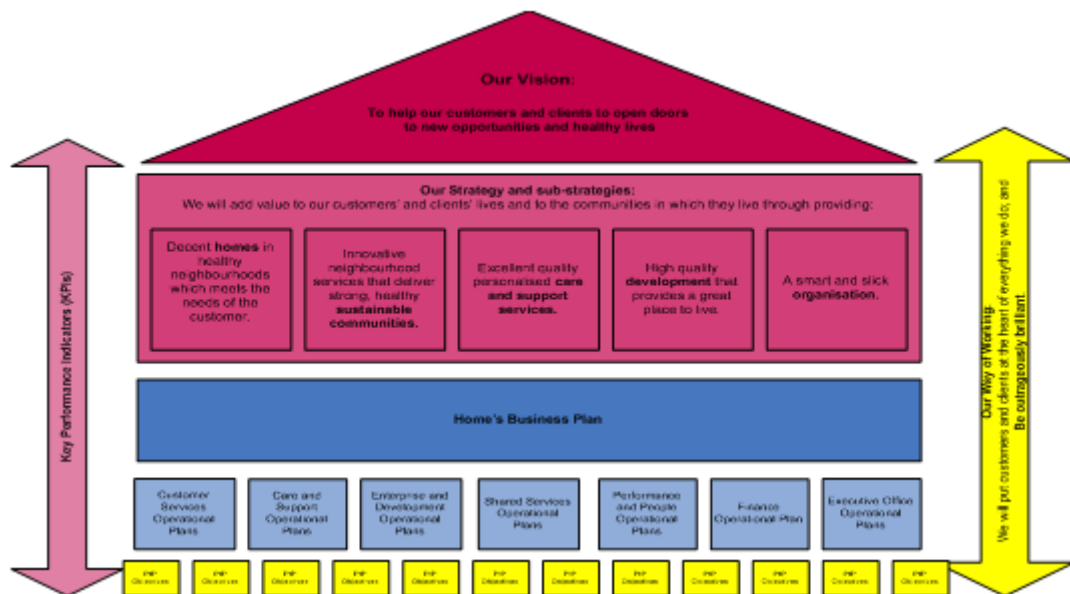


Figure 1: Home's Corporate Planning Framework

2.0 Our Objectives

We aspire to grow fully engaged relationships with our customers and clients with the specific aim of delivering tangible benefits to them and to Home, including shared ownership in the long-term sustainability of the organisation. Our customers and clients have told us that they want to hold us to account, want us to fix the basics and to 'get things right' including:

- Providing more opportunities for involvement;
- Better information about involvement activities;
- Access to email and web services;
- Providing a safe and secure neighbourhood that is a great place to live.
- Carrying out repairs effectively and in a timely manner; and
- Providing an up to date and 'modern' home.

The work that we are doing on customer profiling, the results of our customer surveys and monthly satisfaction surveys will support us further in understanding our customers and clients, strengthening our relationships with them on an on-going basis.

For Customer and Client Engagement the following objectives will help us to plan and measure our effectiveness:

Objective 1 – To work with our customers and clients to continuously improve and refine our services and products through our customer and client involvement and consultation approaches.

Objective 2 – To ensure equality of access to consultation and involvement for all our customers and clients

Objective 3 – To continue to develop effective scrutiny and review of our activities through a co-regulatory approach

Objective 4 – To deliver efficient and effective consultation and engagement approaches that have appropriate advice and resources at their disposal

These objectives help Home to fulfil Opening Doors in the following way:

Sustainable Communities 4: Offering effective engagement
Objective 1 Objective 2 Objective 3 Objective 4

3.0 Our Approach

3.1 Framework

We need to respond to the changing regulatory environment and to develop our relationship with customers and clients, providing them with opportunities to be involved in the delivery and shaping of their services. In practice this means evidencing how our customers have been engaged in changing the way that we do things through a variety of different mechanisms:

- Involvement.
- Engagement.
- Consultation.
- Regulation and Scrutiny.

These mechanisms are underpinned by an effective performance management framework, robust information sharing and clear communication channels between customers and clients and Home.

Home is committed to developing and growing our relationship with customers and clients across the spectrum of our services and our intention with the utilization of our mechanisms are as follows:

Involvement: The way in which we involve customers and clients in shaping the way our products and services are designed, planned and delivered. Our approach to involvement will enable customers and clients to shape what we provide and for Home to embed in the design and delivery of services, upward and downward communication throughout the organisation.

Engagement: The way in which we define what we stand for, how we offer choice and how we manage each and every individual interaction between ourselves and our customers/clients, encouraging loyalty and differentiating us from our direct and in-direct competitors. Our approach will put customers and clients at the heart of everything we do in an equal manner by being clear, simple and accessible and ensure that compliments and complaints are resolved promptly, politely and fairly.

Consultation: The way in which we will consult with customers and clients, upon issues that are likely to have a significant impact upon service delivery. Our approach will be designed to meet specific needs and will be tailored accordingly. So, for example, consultation may take place at a group-wide level, within business regions, care and support, or at an estate level. It is likely that particular consultation would be undertaken in the following circumstances:

- Changes to policy or procedures affecting all customers;

- Substantial changes to the level of customer facing service provision;
- Large scale regeneration programmes which are likely to substantially impact upon local communities and residents.

Regulation and Scrutiny: The way in which we enable our customers and clients to scrutinise the quality and our performance in delivering services. Our approach will engage customers and clients in the self-regulation of Home to ensure that we continuously improve what we offer and our standard of customer service.

Combining this multi-method approach enables Home to offer a menu of options to customers and clients and how they can be part of Home now and in the future. This menu is tailored by customers for customers and used to embed appropriate approaches to engagement across Home over the life of this strategy.

Resident Involvement Framework			
Customer and Client Engagement Sub-Strategy			
Menu of Involvement:			
Consultation & Feedback	Participation	Management	Scrutiny
<ul style="list-style-type: none"> • Customer Satisfaction Survey; • Telephone surveys • Themed focus groups (eg: transformation) • KISS Groups 	<ul style="list-style-type: none"> • Local involvement & engagement events • Tenant Resident Associations; • Open events • Estate scrutiny/walkabouts 	<ul style="list-style-type: none"> • Customer and Client Board Members • National Customer Panel • National Client Panel (Leaseholder Panel) 	<ul style="list-style-type: none"> • Viewpoint: Resident Inspectors

3.2 Guiding Principles for Customer and Client Relationships

As part of our commitment to changing our relationship with customers and clients and improving our understanding of their needs we will ensure that no individual, group or community is excluded from engaging with us and we will develop a range of engagement methods which allow customers and clients to choose how they interact with us.

In doing this we will be clear about doing things jointly, informing our customers and clients and consulting, involving and engaging with them. In response to this we will apply these core principles to guide our customer and client relationships:

1. Broadening **accountability** of Board through continued presence of a customer and a client as Home Board members;
2. Robust **consultation** with our customers and clients that informs the design, delivery and on-going review of services;
3. **Equality** of access to engagement for all our customers and clients to inform our insight and understanding of customers and clients;
4. **Identifiable** rights and standards to promote and embed tenant engagement and involvement; and
5. **Co-regulation** between ourselves, customers and clients.

3.3 Menu of Involvement

In order to deliver our objectives for customer and client engagement we will adopt a wide range of mechanisms which will maximise interactions between ourselves and our customers and clients, changing the way in which we relate to one another. These include:

Customer Satisfaction Surveys

These will be used to find out customer and client views and opinions on specific themes or services, or for more general satisfaction with our overall performance.

Telephone Surveys

These will be used to find out customer and client views and opinions on a particular theme or service.

Themed Focus Groups

Colleagues, customers and clients can get together as a small group, meeting on an ad hoc basis to discuss and share ideas on a specific topic to influence the services we provide.

KISS Groups

These groups aim to get customer and client input and opinions into our communications: newsletters, leaflets etc. Customer feedback can then shape and tailor our communications approach.

Local Involvement and Engagement Events

Customers and clients have an opportunity at these events to get to know their local colleagues in a more informal environment. They are

flexible and can be tailored to local areas. Examples include clean up days, neighbourhood days, and festivals.

Tenant and Resident Associations

In line with the new regulatory framework and our desire to provide increasingly tailored services we will work with our customers and clients at a local level. A significant number of customer and client led groups already exist at this level and these will continue to be supported to become self-sustaining in driving improvement in their localities.

Formal residents associations must be constituted with a Chair, Secretary and Treasurer. Home seeks to recognise, encourage and support these associations to be independent and self managing.

Open Events

These are an opportunity to meet customers and residents and learn more about Home and speak to colleagues, including Heads of Customer Service. Each Head of Service will commit to attending a minimum of four open events in their area each year.

Estate Scrutiny / Walkabouts

Together with customers and clients, these will be used to identify local issues to devise and implement solutions. They will be organised by Customer Service Managers on a local basis.

Customer and Client Board Members

The Home Board is strengthened by the appointment of a customer and client member who will serve in their own right rather than as representatives of the wider customer and client base. These appointments provide us with an opportunity to strengthen our Board, are in line with regulatory thinking and provide us with a solid foundation from which we can build and do more.

National Customer Panel and National Client Panel

The role of these Panels will be to represent customers and clients views and interests at a national level. The views of our customers and clients determine our business strategy, business plan, policies and procedures; therefore they have direct influence over our business decisions.

Specifically, the Panels have a responsibility to:

- Be action oriented and work with us to drive improvement to all customers' experience;

- Provide advice and support to the Executive on how it can deliver a consistently positive customer experience, through agreed national and local offers;
- Provide a focal point for consultations with customers;
- Provide input/challenge on customer policies, processes and communications;
- Work with 'Viewpoint' the national inspection team on scrutiny;
- Provide expertise in relation to housing and care and support services; and
- Achieve Tenant Participation and Advisory Service (TPAS) accreditation.

Viewpoint: Resident Inspectors Team

The Viewpoint Team is comprised of customers and clients who carry out inspections of aspects of the services carried out by Home. The Team will work to an agreed Inspection Programme which has been informed by our wider customer insight (such as customer satisfaction surveys and complaints). The Viewpoint Team will make direct recommendations to improve the quality of services provided to all.

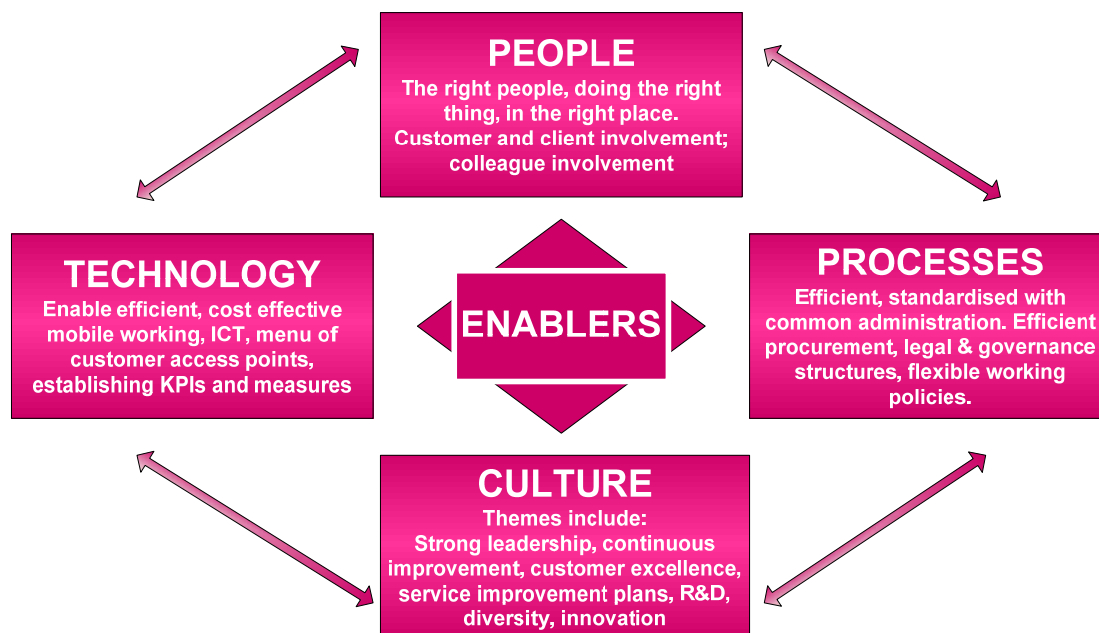
Wider engagement

Home needs to communicate with customers and clients more frequently and in different ways, offering a range of choices to enable customers to better tailor their interactions with us. This includes groups and communities defined as 'hard to reach' including minority groups, those 'slipping through the net' and those who are unwilling to engage with us because they are suspicious, over targeted or even disaffected. Offering a wide range of choices that meet our customers and clients needs will include:

- Consistent, positive engagement at customer point of contact.
- An informative, interactive and up to date website.
- Online information for customer engagement at a national and local level.
- Customers and clients monitoring our performance and feedback on an 'event driven' basis.
- Publishing performance data in relation to Local Authority areas.
- Complaints data informing us to improve services.
- Social networking and other up to date mechanisms which are more likely to meet the needs of a younger demographic.
- Customer satisfaction via text or other mobile technology.
- Themed or other research groups convened as required.

4.0 The Enablers Required

With the support of Central Services and using a Balanced Scorecard approach, the following four enablers will help us to deliver positive outcomes for our customers:



5.0 Measuring Success

We will quality assure our customer and client engagement internally and through external accreditation by the TPAS. Our regulators will look for us to evidence how we support our customers and clients so they are better able to be effectively engaged, involved and enabled. A number of measures will be used to assess the effectiveness of our customer and client relationships. Specifically we will measure ourselves using the following:

Specifically we will measure ourselves using the following:

- % customers and clients very satisfied with Home's customer/client service;
- % customers and clients satisfied with opportunities for involvement;
- The number of service improvements each year which are attributable to customer/client involvement.

These corporate KPIs will be supported by local operational performance measures.

6.0 Cost Profile

Consistent with our commitment in *Opening Doors* to ensure the provision of a best value for money and quality core service offer for our

customers and clients, Home is moving to a zero-based budgeting approach from 2011.

Zero-based budgeting will assist us in driving efficiency and value for money in the current management of our business operations through frequent assessments of the appropriateness and productivity of each cost allocation. This iterative approach will force us to be innovative and clear about the outcomes we are seeking in response to the challenges we face and how we will prioritise our resources in order to achieve these. Clear justification and robust evidence of the outcomes to be achieved will be required for all spend. In the longer term this will ensure that Home continues to operate as a viable and financially strong business.

7.0 Action Plan

In order to deliver the objectives, we recognise that a series of actions, both strategic and operational are needed. Through the corporate planning framework these actions are monitored and reported on for the Board of Management, Customers, Clients and other stakeholders to hold Home to account for its delivery. The specific actions that will deliver this sub strategy can be found in the Operational and Service Improvement Plans of Home.

8.0 Expected Outcomes

Achieving the objectives outlined in Section 2 through following the actions detailed in the associated Operational Plan(s), success for Home will look like:

Outcomes	Customers will be able to choose how to interact with Home to give their views on service delivery and development. This will result in all customers' needs being taken into account when services are being developed and delivered.
	Customers will have a range of options to get involved and help shape services. They will understand how they can get involved, where and when.
	Customers will know how their views have influenced our business priorities and how we are responding to their views. Customers will have a range of options to get involved and help shape services. They will understand how they can get involved, where and when.
	Customers will be able to choose how to be involved with and influence Home. This will result in all customers needs being taken into account when services are both being developed and delivered and that services meet customers needs and expectations.

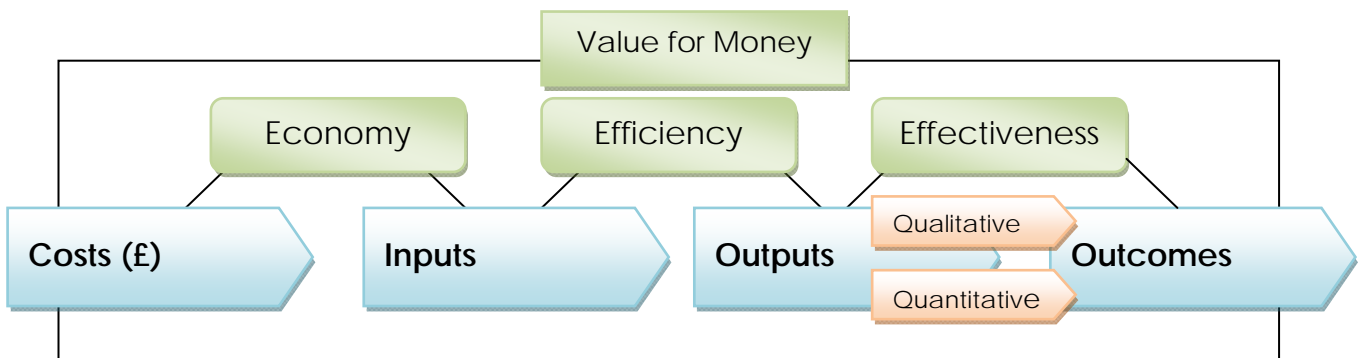
9.0 Valuing Diversity

In our corporate strategy we recognise that we need to make equality and diversity an integral aspect of our long term approach to business. Our aspiration is to be recognised as a centre of excellence in respect of equality and diversity issues, performance, customer service and customer involvement.

This sub strategy complements Opening Doors through reiterating our commitment to valuing diversity. Our Equality and Diversity Strategy sets out in detail our new approach to tackling diversity issues and, in particular, a new approach to recruitment is being devised in order to develop a more diverse colleague workforce.

10.0 Value for Money (VFM)

The application of VFM is fundamental to Home’s business operations, underpinning the core business, business growth and business improvement activities. Central to this process is Home’s embracing of the principles extolled in the Audit Commission Standard “KLOE 32 – Value for Money”. Home’s approach to VFM can be summarised as looking at the entire value chain below:



In regard to this Customer and Client Engagement sub-strategy, VFM is inherent within the main strategy areas and specifically includes:

- Partnering and procurement
- Product and service standards
- Benchmarking
- Performance monitoring
- Customer satisfaction and involvement

11.0 Monitoring and Review

We will actively utilise a variety of customer feedback mechanisms, including complaints, to shape and review our services on an ongoing basis.

In order to ensure that our sub-strategy remains viable, time-bound and appropriate for the circumstances in which we operate, Home will review its sub strategies in their entirety on a rolling twelve monthly cycle with customers, clients, staff and the appropriate stakeholders. This review cycle will be led by the Strategy and Innovation Team.

12.0 References and Further Information

The documents detailed below provide further information on various elements of Home's activities. This Customer and Client Engagement Sub Strategy should be read in conjunction with these documents to ensure an all round understanding of key issues is ascertained.

- Opening Doors
<http://intranet.home.ltd.uk/informationcentre/Strategy%20and%20Research/Opening%20Doors.pdf>
- Housing Sub-Strategy
- Neighbourhoods Sub-Strategy
- Housing Sub-Strategy
- Care and Support Sub-Strategy
- Enterprise and Development Sub-Strategy
- Value for Money Strategy
- Home's Business Plan
<http://intranet.home.ltd.uk/informationcentre/Communications/Business%20plan/Home%20Group%20Business%20Plan%202010-2015.doc>
- Home's Policies and Procedures:
<http://intranet.home.ltd.uk/informationcentre/Housing%20Operations/Forms/AllItems.aspx> and
<http://microsites.home.ltd.uk/hub/policy.html>
- Home's Policies and Procedures:
<http://intranet.home.ltd.uk/informationcentre/Housing%20Operations/Forms/AllItems.aspx>
- Homes and Community Agency:
<http://www.homesandcommunities.co.uk/>
- Scottish Housing Regulator:
http://www.scottishhousingregulator.gov.uk/stellent/groups/public/documents/webpages/shr_homepage.hcsp
- KLOE 32: Value for Money. <http://www.audit-commission.gov.uk/housing/inspection/keylinesofenquiry/pages/valueformoneykloe.aspx>
- Total Place: http://www.hm-treasury.gov.uk/psr_total_place.htm
- Big Society: <http://www.cabinetoffice.gov.uk/media/407789/building-big-society.pdf>
- Customer Panel
- Client Panel
- Recognition Events

ANNEX 1: All Home Group Operating Areas

