

Policy

Title: **Customer Involvement**

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A policy should be a short statement which describes in general terms or objectives what a service area's principles and key objectives are on a particular subject and should be no longer than a 2 pages in length. The aim of the policy is to give practical effect of the strategy it supports.

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CONTENTS PAGE

	Page No
Introduction	3
Aims / Objectives of the policy	3
Scope	3
Policy Statement	4
Responsibility	7
Service Standards	8
Performance Measure / Monitoring	8
Consultation Arrangements	8
Benchmark Analysis	9
Regulatory and/or Legal compliance	9
KLOEs affected	9
Equality and Diversity Considerations	9
Links to Procedures, Strategies and Associated Documents	10
Business Impact	10
Self Assessment Compliance Statement (SACS) Considerations	10

Introduction

Halton Housing Trust (the Trust) is committed to enabling customers to become directly involved in the management of their homes, and in determining the existing and future shape of services they receive.

The Trust recognises that in many of the areas in which it works a substantial proportion of the housing stock has been sold under the Right to Buy. Therefore to ensure it builds and maintains sustainable communities the Trust recognises the importance of involving all those people who live in the areas in which it works in the services that affect the quality of their lives and the built environment. Where specific reference is made to 'customers', this refers to all occupiers of the Trust's homes including customers who hold assured and starter tenancies, residents in supported housing and leaseholders.

This Customer Involvement Policy sits within the context of the wider Customer Involvement Strategy for the Trust. This document sets out what the Trust seeks to achieve from the commitment and substantial investment it makes into its community development arrangements and how this is to be achieved and supported.

The Trust will always look to meet the requirements of the Tenant Services Authority (TSA) and the expectations as set out within the Key Lines of Enquiries (KLOEs) across all service areas, including customer involvement.

Aims / Objectives

The Trust recognises that not all customers will wish to be involved in the same way. Some customers will wish to be informed only, others will wish to be consulted, whilst others will want to be actively involved in the decision making process. The Trust respects all of these views and it will be for individual and groups of customers to determine their own level and preferred mechanism of involvement.

There are some decisions that will need to be determined by customers who hold tenancies with the Trust, especially where these relate to resource decisions which are to be funded from rental income. Local structures will ensure these principles are safeguarded whilst also benefiting from the input and views of the wider body of residents.

Scope

The Trust views customer involvement as one of its key areas of activity. This is reflected in the fact that one of the themes in the Trust's Corporate Plan is 'customer culture'. One of the priorities attached to this theme is "enhancing the role for customers at all levels – to shape and determine the services they receive."

In view of this, customer involvement potentially can affect all service areas, but it is especially important for those employees working in the Customer Involvement and Area Housing teams.

Policy Statement

The Trust is committed to ensuring that all customers will have the opportunity to be involved both on a formal or informal basis, as individuals or as members of groups, at a level they feel comfortable with and at a pace that they can determine.

The Trust believes that customer involvement is the primary tool to enhance and develop its efficiency and effectiveness. This can be achieved in the following ways:

- local involvement in decision making ;
- accountability at local level including a performance monitoring role;
- built in customer perspective for the service ;
- determining existing and future service quality and standards;
- strong community links and relationships.

The Trust is keen to build relationships with Halton Borough Council, other community stakeholders and a range of voluntary groups to pursue and achieve common goals.

This policy will be implemented in line with the regulatory requirements of the TSA.

It will provide a clear commitment from the Trust to take into account customers' views prior to making decisions across all aspects of service delivery, and to ensure that the outcomes from customer involvement are reported back to all customers.

The way in which the policy will be implemented has two separate dimensions:

1. Customer Involvement and Influence over Decision Making
2. Customer Consultation and Information

1. Customer Involvement and Influence over Decision Making

The Trust will provide its services in line with the TSA's regulatory requirements and the service standards as set out within the KLOEs across all service areas.

Although there is no universal model of involvement there will be a range of opportunities for customers to become involved, and have a real say in the management of their homes and the housing service. These will include:

- Open Membership to the Trust – all customers who hold tenancies have the opportunity to become Members of the Trust. As such, they would be able to attend the Trust's Annual General Meeting (AGM), receive detailed annual performance and financial reports, and take part in the voting on the appointment of Independent Board Members at the appropriate AGM.

In addition, residents would have the opportunity to apply to become Independent Members of the Trust. Details and application forms regarding membership would be available from the Company Secretary.

- Customers who hold tenancies can sit on the Trust's Board of Management – one third of the seats on the Trust's Board will be reserved for such customers, and they will have exactly the same rights and responsibilities, including voting rights, as the other board members.
- Customer Inspectors – the Trust will look to provide training to create a pool of customer inspectors who can reality check service provision and feedback suggested improvements for consideration in any service improvement plan reviews etc.
- A panel of customers that meets six times a year, named the Customer Forum. Two of the meetings are attended by the full membership which includes three local ward Councillors and three independent members. The Forum provides an opportunity for customers to have a strategic role in shaping the services delivered by the Trust.

They will have a budget available to them to address local environmental issues. They have an active role in performance management and ensuring that the Trust is accountable for the quality and standard of services it delivers

- Customer Involvement Compact – the Trust is committed to the principles and standards for customer involvement and seeks to build upon the baseline position negotiated between customers who previously held with Halton Borough Council and the Council itself. These principles and standards have provided the foundation for the development of the Trust's own Customer Involvement Agreement and its associated Customer Involvement Statement, as well as wider Customer Involvement Strategy between the Trust and its customers.
- The Trust views the Customer Involvement Team - with the assistance of the Area Housing Teams - as a primary focus for participation at a local level and for ensuring ownership of the Customer Involvement Strategy throughout the organisation. This will also be reflected in the core competencies and targets for staff.

Examples will include regular and timetabled estate walkabouts, the development of neighbourhood action plans (NAPs), management of local improvement schemes and general liaison between customers and staff. Area Team staff will respond to reasonable requests for information or assistance from customer groups, including attendance at meetings where required.

NAPs will reflect the local priorities and needs of customers in their particular area.

The Trust will support customer involvement by:

- providing a designated Customer Involvement Manager to support and sustain customer involvement;
- providing start up, annual and development grants to customers' groups;
- helping groups identify opportunities and apply for independent funding;

- exploring options to provide additional funding for individual groups;
- developing an extensive training programme for customer representatives across all service areas;
- identifying and providing training for customer representatives, Board Members and Trust staff, to acquire the skills and knowledge which will allow them to work together effectively, and ensure effective involvement in decision making and service improvement;
- promoting innovative approaches to involvement and exploring the development of other ways to widen the inclusion of customers in the management of the business. This can include partnership with other local housing associations in providing training opportunities, e.g with customer inspectors.

2. Customer Consultation and Information

The Trust will consult with its customers in accordance with the TSA's regulatory requirements. It will also reflect the expectations as set out within the Housing KLOEs across all service areas.

Consultation

The Trust will ensure that customers are provided with sufficient information to understand any proposals it puts forward. The Trust will consult and involve customers on all matters of housing policy and practice including:

- business planning ;
- developing the housing strategy ;
- investment priorities ;
- setting and monitoring service standards and performance targets ;
- reviews of services and performance and decisions about remedial action ;
- regeneration, redevelopment and repairs schemes ;
- environmental works ;
- tenancy conditions ;
- housing management services ;
- rent levels and service charges (even where there is no legal requirement to do so);
- community safety ;
- equality and diversity issues ;
- arrangements for the publication and provision of customer information ;
- complaints procedures.

This will be achieved by using a variety of means including (but not restricted to) meetings, information sheets, training events and newsletters. The Trust will be responsible for making the arrangements for all meetings it sponsors including the booking of suitable venues and notification/publicity.

The Trust will continue to support the creation of independent customer groups, which has always been seen in the past as one of the building blocks of effective consultation.

While continuing to support these formal groups, the Trust will also look to continue to develop a more flexible consultation and involvement framework, which includes:

- A Customer Panel – a group of individual customers who are consulted a number of times per year about the housing service and/or proposed changes to policy. This will be done by a combination of postal and telephone surveys.
- Street Representatives – a spokesperson nominated to represent up to 30 customers who hold tenancies, with a mandate to provide information and put forward views on housing policy issues.
- Community Events - a variety of fun activities which provide an informal opportunity for customers to have a say and give their views.
- Published Estate Walkabouts – using a published timetable agreed with local residents in advance the Trust together with a range of other local agencies will undertake estate walkabouts to identify problems and increase accessibility to customers. The outcomes and actions taken as a result of these walkabouts will be published through a variety of ways and progress against identified actions monitored to ensure delivery and accountability.

In all of its consultation with customers the Trust will :

- allow adequate time for customers to consider proposals and respond;
- take account of the variety of views and feedback the reasons for decisions reached;
- provide customers with the outcomes from consultation processes in a format that is clearly understood;
- work in partnership with the local community including other local and statutory agencies.

Information

All customers will receive written information in the form of letters, reports, brochures, information pamphlets, leaflets and newsletters. In addition all new customers will receive an information pack about services and opportunities for participation. A customer handbook is provided to all customers. A separate publication will be made available for leaseholders. All information will be available in a variety of formats to ensure that it is:

- relevant and at the level of detail appropriate for the customers ' needs ;
- in a readable typeface and print size ;
- in an attractive design and format, and inviting to read ;
- in clear, concise, plain language ;
- provided in translation where appropriate ;
- provided in formats suitable for customers with specific communication needs, e.g. large print, Braille, CD, picture format for people with learning disabilities, electronic.

Responsibility

The Director of Customer Services will have ultimate responsibility for the effective implementation of this policy.

The Director of Customer Services will also be responsible for ensuring that all staff involved in its implementation are aware of and trained in this policy and any associated procedures. These will also form part of the core competencies for staff and a basis for core performance targets.

Day to day responsibility for implementing this policy will lie with the Customer Involvement Manager.

Service Standards

Because customer involvement is seen as an overarching topic covering all service areas, there are no specific service standards for this area.

However, the Trust will look to establish a list of the 'top 10' service standards determined by its customers on an annual basis across all service areas. Performance in these areas will be reported back to customers on a quarterly basis via the newsletter.

Performance Measures / Monitoring

The Trust is required to report on a statutory basis against two Performance Indicators (PIs). These relate to satisfaction with the overall service by the Trust as a landlord; and taking customers' views into account.

In addition to these, a number of other performance measures have been developed by the Trust for this area. These include:

- A half yearly report to Customer Services Committee as an update of progress against the Customer Involvement Strategy Action Plan.
- A number of PIs are reported to Board on a quarterly basis which covers such things as number of community events, estate walkabouts, customer profiling etc.

The Trust also carries out a Status compliant survey every quarter. Results from these surveys are used to monitor performance against both statutory and local PIs, as well as the negotiated service standards.

Consultation arrangements

Customers have been actively involved in reviewing a number of key areas which feed into this policy. For example, the development of the Customer Agreement and Statement, the funding arrangements procedures, the review of the Partnership Agreement relating to tenant and resident associations.

The revised policy was considered by the Customer Forum and their views and comments have been incorporated.

Benchmark Analysis

The Trust is a member of Housemark's Resident Involvement Benchmarking group and will use this facility to benchmark its performance against other organisations in this service area.

Regulatory and/or Legal Compliance

Until the introduction of the TSA's own standards which are currently due to be introduced in April 2010, the Regulatory Code of the former regulator – the Housing Corporation - is still relevant to this policy, and has to be adhered to by the Trust.

In relation to this policy area, point 2.5 of this code states that “*Housing associations must seek and be responsive to residents' views and priorities:*

2.5.1 reflecting these interests in their business strategy;

2.5.2 giving residents and other stakeholders opportunities to comment on their performance;

2.5.3 enabling residents to play their part in decision making;

2.5.4 providing opportunities for residents to explore, and play their part, in how services are managed and provided.”

Although housing associations have no statutory obligation to consult with or involve residents, they are expected to comply with the principles of the Housing Act 1985 and subsequent Acts regarding 'resident involvement'.

KLOEs affected

The Audit Commission Housing Inspectorate has produced a Landlord Services KLOE on Resident Involvement, which has a direct impact on this policy.

It asks a variety of questions on such topics as:

- communication and consultation with customers/stakeholders about 'resident involvement';
- clear and comprehensive service standards being in place and are from a service user's perspective;
- compliance with statutory requirements and good practice in 'resident involvement';
- accessibility for all users/potential users to resident involvement opportunities;
- levels of resources and training for service users which demonstrates the organisation's commitment to resident involvement;
- impact of resident involvement which shows improved services and outcomes for service users;
- value for money considerations.

Equality and Diversity Considerations

An Equality Impact Assessment was carried out on this policy in June 2009.

It concluded the following :

- The policy is not directly or indirectly discriminatory
- The policy increases equality of opportunity by permitting or requiring positive action or action to redress disadvantages
- An action plan has been developed which can be adopted that will further enhance the equality of opportunity in the context of this policy.

Links to Strategies, Procedures and Associated Documents

Customer Involvement Strategy 2008-2011

Customer Care Policy

Diversity Policy

Leasehold Consultation Policy

Customer Handbook

Tenant and resident association funding application forms

Getting involved leaflet

Customer involvement leaflet

Business Impact

Customer involvement plays a key role in the Trust's business planning processes. In the Trust's revised Corporate Plan for the period 2009 – 2012, four themes were identified which form the basis against which resources would be allocated. It states in the plan that these themes will be reflected as forming the basis for the budget and business planning process.

All corporate priorities listed under the first of these themes – Customer Culture – show the importance of customer involvement. The priorities are:

- Understanding our customers (current and future) and tailoring services to meet their individual needs and aspirations.
- Working with our people to embed a clear customer culture across all aspects of our work.
- Delivering services against a clear set of service standards.
- Enhancing the role for customers at all levels - to shape and determine the services they receive.

By implementing this policy effectively, the Trust will look to achieve these priorities and provide the best possible and efficient service for its customers which has been shaped by them.

Self Assessment Compliance Statement (SACS) Considerations

It is not envisaged that any changes or amendments are required to the SACS document as a result of the revision of this policy.

It will continue to be covered by the Covellant action reference: R – SACS – 043.