



Customer Engagement Policy	
<b>Document Owner:</b> Director of Customer Services	<b>Document No:</b> CE-PL-002
<b>Date Approved:</b> July 2023	<b>Review Date:</b> July 2026

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### 1.0 Introduction

1.1 The policy outlines the approach taken by Beyond Housing to involve individual and groups of customers in development and aligning of services.

### 2.0 Objectives

- 2.1 Engaging with customers to establish a clear understanding of customers’ needs and expectations, to inform the development and aligning of services.
- 2.2 Provide customers with options and opportunities to be involved in activities that shape and influence operational and strategic decisions.
- 2.3 Use insight and technology to support customer engagement and inform decision making.
- 2.4 Routinely measure success and impact of customer engagement.
- 2.5 Seek out best practice and consider how we continually improve the way we engage with customers.
- 2.6 Promote the positive impact of involved customers and ensure mechanisms are in place to feedback impact of customers engagement.
- 2.7 Deliver an approach to complaints that is clear, simple, and accessible that ensures that complaints are resolved promptly, politely, and fairly.
- 2.8 Ensure compliance with consumer regulation expectations and standards.

Key performance indicators to be measured during the application of this policy:

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Key Performance Indicator	Owner (job role)	Policy objective alignment
Satisfaction that the landlord listens to Customer views and acts upon them	Director of Customer Services	2.6
Complaints received per 1,000 homes during the reporting year	Insight Manager	2.7
Compliance with consumer regulation expectations and standards	Director of Customer Services	2.8
The percentage of Beyond Housing customers who engaged and providing feedback (annually)	Insight Manager	2.2
The number of Beyond Housing customers who engaged and providing feedback (annually)	Insight Manager	2.2
The number of engagement activities which have informed key business activities; 1) Policies and Procedures 2) procurement 3) service improvement	Insight Manager	2.1, 2.3 & 2.4

### 3.0 Definitions

3.1 The use of the term ‘**engagement**’ in this policy is taken to mean:

- Where Beyond Housing interacts and connects with customers through pre-existing localised groups i.e., resident associations, and/or local events.
- Customers providing scrutiny and feedback on Beyond Housing services e.g., targeted scrutiny sessions/campaigns, feedback and customer satisfaction surveys, and continuous improvement activities.
- Targeted consultation focusing on customers shaping and influencing design of products and services.

3.2 **Scrutiny** - The process of examining and evaluating services provided by Beyond Housing from a customer’s perspective. This process can help identify areas that need improvement and make changes to improve customer satisfaction.

3.3 **Feedback** - The process of collecting and analysing customer opinions and suggestions about a product or service. Customer feedback can help improve products and services

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by identifying areas that need improvement and making changes to improve customer satisfaction.

- 3.4 **Consumer regulations** - Consumer regulations in the housing sector are designed to protect tenants and ensure that they receive a good standard of accommodation and service from their landlords. The UK government has set out four consumer standards for social housing providers: Home Standard, Tenancy Standard, Neighbourhood and Community Standard, and Governance and Financial Viability Standard.
- 3.5 **Service delivery** - Service delivery refers to the process of providing a service to customers. It involves the entire process of delivering a service from start to finish, including the design, planning, implementation, and evaluation of the service.
- 3.6 **Operational** - The day-to-day management and maintenance of a property or properties. This includes tasks such as cleaning, repairs and maintenance, and ensuring that the property is safe and secure for tenants.
- 3.7 **Strategic** - The long-term planning and management of social housing properties. This includes tasks such as identifying areas of need, developing new properties, and ensuring that existing properties are well-maintained and meet the needs of tenants.

#### **4.0 Legislative, regulatory, and strategic alignment**

- 4.1 The legislation and regulation applicable to this policy includes:
- The Regulator of Social Housing’s (RSH) Customer Involvement and Empowerment Standard
  - Localism Act 2011
  - Housing Act 1996
  - Data Protection Act 2018 (DPA)
  - General Data Protection Regulation (GDPR)
  - Privacy and Electronic Communications Regulations (PECR)
  - Equality Act 2010
  - RSH Tenant Satisfaction Measures Standard
  - Housing Ombudsman Service Complaint Handling Code
  - Tenant Involvement and Empowerment Standard - 2017
- 4.2 Compliance with collection, storage, access to, provision and disclosure of data is in accordance with all relevant data protection and information security legislation.
- 4.3 Beyond Housing values diversity and is committed to promoting the equality of opportunity to ensure all customers are treated fairly.

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- 4.4 Vulnerable customers will be identified, and specific needs met by making appropriate and reasonable adjustments.
- 4.5 Customer engagement will support the policy and procedure framework, ensuring the impact on customers has been assessed and reasonable adjustments have been made.
- 4.6 Customer engagement will help to define the Beyond Housing customer experience and ensure systems and services are equipped to deliver a standout experience.
- 4.7 Customer engagement will provide a customer centric viewpoint within the procurement framework, ensuring customers provide assessment and scrutiny of third-party suppliers who will deliver and influence the customer experience.

## 5.0 Responsibilities

- 5.1 The Director of Customer Services has overall responsibility for the effective implementation of this policy and is responsible for ensuring that employees involved in its application fully understand their roles and responsibilities.
- 5.2 The Insight Manager is responsible for ensuring sufficient resource is available to support customer influence.
- 5.3 The Community Partnership and Engagement Managers are responsible for the design and delivery of community engagement and producing concise reporting to share findings.
- 5.4 The Customer Insight Analysts are responsible for the period collection of Tenant Satisfaction Measures (TSM's) and the creation of surveys and polls to collect customer feedback.
- 5.5 Housing Managers and Housing Officers are responsible for engaging with local residents and action groups, to discuss and understand opportunities for improvements within Beyond Housing communities.
- 5.6 All employees are responsible for contributing to customer engagement.

## 6.0 Policy Delivery

- 6.1 Customers are given a wide range of opportunities to influence and be involved in:
- The formulation of housing-related policies and strategic priorities
  - The making of decisions about how housing-related services are delivered, including the setting of service standards.
  - The scrutiny of performance and the making of recommendations about how performance might be improved.

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- The management of their homes, where applicable e.g. the management of repair and maintenance services.
  - The service choices available to customers, including any additional costs that are relevant to specific choices.
  - How customers can communicate with Beyond Housing and provide feedback
- 6.2 Depending on the type of engagement, a range of methods, including meetings, focus groups (digitally and face to face), surveys and polls, will be utilised to provide opportunities and choice for customers to have their say.
- 6.3 Periodic surveys will be conducted to establish customer satisfaction with services provided by Beyond Housing and to collect the required Tenant Satisfaction Measures (TSM's), as outlined by the Regulator of Social Housing (RSH). The Tenant Satisfaction Measures data will be submitted to RSH every year.
- 6.4 Beyond Housing will engage with residents and action groups, to discuss and understand opportunities for improvements to services, through mutually agreed forums.
- 6.5 Beyond Housing will consult with customers where we are proposing a change in landlord for one or more of their tenants or a significant change in their management arrangements.
- 6.6 Feedback from customers will be compiled to assess performance and made available to all colleagues, the executive team and Beyond Housing Board, to inform operational and strategic priorities.
- 6.7 Beyond Housing will promote the positive impact of involved customers on services and ensure mechanisms are in place to feedback impact of customers engagement through our Annual Tenant Report and regular local newsletter.
- 6.8 Barriers to engagement will be continually reviewed to encourage participation from underrepresented groups.
- 6.9 Customers will be provided with a range of ways to express a concern or make a complaint, with clear service standards for responding to complaints, including what to do if they are unhappy with the outcome of a complaint set out. These service standards are aligned to the Housing Ombudsman Handling Code.
- 6.10 Information about complaints will be published each year, including their nature, and the outcome of the complaints.
- 6.11 Beyond Housing will consult customers at least every three years on the best way of involving customers in the governance and scrutiny of housing management services.

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6.12 Beyond Housing will seek best practice and engage with subject matter experts inside and outside of sector.

## 7.0 Controls and reporting

First line control	Responsible (Job role)	Reported to:
Consumer regulation self assessment – transparency, influence and accountability standard	Insight Manager	Director of customer service
Monitoring of kpi's associated to policy delivery: a) TSM – satisfaction that the landlord listens to customer views and acts upon them b) Complaints received per 1000 properties	Insight Manager	Director of customer service
Monitoring of customers and volumes of customers who engage and provide feedback	Insight Manager	Director of customer service

## 8.0 Consultation

8.1 In response to the Government publishing 'The Charter for Social Housing Residents' and to support the delivery of the Beyond Housing corporate strategy, a review of Beyond Housing's existing customer engagement proposition was completed in partnership with Tpas (a customer participation expert) in January 2021.

8.2 Customer consultation, as part of the review in 2021, focused on establishing customers' expectations and the provision of opportunities for customers to shape and influence in the development and design of services.

8.3 Further consultation with both Tpas and Beyond Housing customers was completed in February 2023; a) Customer assessment of the policies ease to read and alignment of the policy to their expectations. b) Tpas and independent assessment from a sector expert.

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## 9.0 Approval

9.1 This policy will be reviewed after three years or in response to a change in legislation or best practice, whichever is the sooner.

Approval and revision Criteria	Information
Document written by:	Director of Customer Service
Document approved by:	Governance & Review Committee
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2	July 2023	3 year back stop review

