



Tenant Engagement Strategy:Housing Services

Approved: 21st May 2015
Board of Management



BIELD HOUSING & CARE

Registered Office: 79 Hopetoun Street, Edinburgh, EH7 4QF
Scottish Charity No. SC006878

TENANT ENGAGEMENT STRATEGY

1. Aim

Organisations that deliver a customer service are at their most successful when their customers are at the heart of their business. Bield recognises that tenant engagement is essential to ensuring that tenants are at the heart of our business and that through communication, feedback and engagement, tenant's views can shape the service they receive and ensure that our commitment to continuous improvement becomes a reality.

The aims of the strategy are:

1) *To maintain and strengthen existing methods of tenant engagement*

Bield have a strong history of tenant engagement and have a framework in place to support this. We want to sustain current engagement methods whilst continuing to seek ways to improve

2) *To identify gaps and barriers to engagement and address them*

Tenant Engagement activity is recorded and the information collected will help us to identify areas where we have a need to encourage or increase tenant involvement and to consider what barriers there may be to engaging with our tenants. We need to ensure that there is equality of opportunity for all of our tenants to have their voice heard.

3) *To develop a mechanism for tenant scrutiny*

Tenant Scrutiny will give tenants the opportunity to measure, test and monitor the services they receive which will empower them to influence the development of the business and to improve our customers' experience of the service they receive.

The Strategy aims to provide a framework for engagement that give tenants the knowledge, skills, resources and power to develop and shape the mechanisms and opportunities open to them.

In delivering these aims, the Strategy will ensure that Bield fully comply with the Housing (Scotland) Act 2001 and with the regularity requirements of the Scottish Social Housing Charter

2. Objectives

To achieve these aims, Bield has set the following objectives:

- Develop and review the Tenant Engagement Strategy in consultation with tenants
- Create and sustain a range of opportunities in which tenants either as individuals or as groups can be involved at whatever level they choose
- Develop a mechanism that will allow tenants to scrutinise Bield's performance and provide feedback that will improve services
- Provide clear, relevant and accessible information to tenants about the services they receive and the routes open to them to become involved
- Provide training, resources and support to tenants and tenants' groups to enable them to participate
- Engage with groups that may be excluded or under represented
- Embed a culture of tenant engagement within the organisation
- Train and support staff on their role in delivering Tenant Engagement
- Monitor and evaluate the effectiveness of Tenant Engagement
- Seek to continuously improve Tenant Engagement within Bield

3. Action Plan for 2015-2018

An action plan has been developed to identify key tasks to be undertaken to ensure that the aims and objectives of the Strategy are met. A full copy of the action plan is appended to this Strategy. A separate action plan and timeline for Tenant Scrutiny will be developed and monitored by the project steering group.

4. Maintaining and strengthening existing methods of tenant engagement

Bield currently provide a range of opportunities for tenants to influence and shape the service Bield provide both as individuals and as part of a group and is committed to enhancing and increasing the opportunities that already exist. It is therefore expected that the opportunities for involvement noted below will change and develop during the lifetime of this Strategy. Tenant Engagement is promoted at the start of every tenancy as part of the welcome and sign up process and relevant information is included in the Tenant Handbook. Tenant Engagement events are highlighted on development notice boards and in the Bulletin.

4.1 Individual Tenants

The ways individual tenants can become involved are:

- Responding to tenant surveys
- Providing comments and feedback either in person, in writing or via the website
- Attending local meetings at developments about proposed refurbishments; use, furnishing and decoration of communal areas; changes to service or other local issues

- Attending Annual Scheme Meetings, surgeries or drop in events
- Responding and contributing to the content of the Bulletin
- Becoming a member of Bield
- Being part of a Focus Group
- Joining the Interested Parties List, Partnership Forum or joining/setting up a Registered Tenants Organisation

4.2 Interested Parties List

The Interested Parties List was initiated in 2011 as a way of providing an additional method for tenants to be consulted on matters that affect them, particularly for tenants who did not wish to, or were not able to, join and attend Partnership Forum Meetings. Members participate via written consultation methods or by invitation to attend informal local meetings. The list aims to have a representative sample of tenants across all housing stock types – retirement, sheltered, very sheltered, integrated, amenity and general needs – and across all geographical areas in which we operate.

4.3 Registered Tenants Organisations

Tenants may decide to form a group to work together and to communicate with other groups and with Bield. This could be as a Registered Tenants Organisation (RTO) with specific rights under the Housing Act or as a more informal tenants group. Information and guidance on setting up an RTO is available to tenants from their Housing Officer or Tenant Engagement Officer who will support the tenants to establish an RTO. Bield maintain a Register of RTO's which is updated annually. An RTO has to meet certain criteria to be accepted onto the register:

- Have a constitution which says how they work and the area they cover
- Have a Committee of at least three people
- Have open membership to all tenants in their area
- Record how their finances are used
- Show how they consult with their members
- Hold an Annual General Meeting.

RTO'S are consulted on policy and service changes via special meetings, focus groups or questionnaires.

4.4 Informal Tenants Groups

In many developments informal Tenants Groups exist where they have considered the benefits of becoming an RTO and have opted to remain as an informal group. In the past they focus of these groups may have been to develop and coordinate social activities but have also served as a vehicle to raise development specific issues. Informal Groups have a role to play in developing active tenant engagement by encouraging tenants to work together to resolve local issues.

4.5 Tenant Focus Groups

From time to time, focus groups are either set up at a development or across a geographical area to consider a particular issue such as policy development or to support service change taking place at a local level. These forums give tenants the

opportunity to develop and shape the service they and other tenants receive in the future.

4.6 Partnership Forum

The Partnership Forum was established in response to the Housing (Scotland) Act 2001 and aims to act as a national group operating at a strategic level. The group has 16 tenant places, split into 4 geographical areas to ensure engagement from across the country. The Partnership Forum has a separate constitution, code of conduct and expenses Policy. (See Appendices 1 & 2). Members serve a three year term of office and are then required to re-stand for election. Vacancies can also arise if Members resign or are no longer Bield tenants. A Chair and Vice Chair are elected from the tenant members.

If there is more than one person interested in a vacancy then an election is held to determine the new member. PF members are representative of all tenants and do not have a role to represent a particular group of tenants or to provide feedback to tenants. The tenant members work in partnership with senior staff and Board members to consider the impact of policy review and service change.

The Forum's Constitution recognises the Forum's need to be independent of the organisation whilst working in partnership. To promote its independence, the Forum:

- Has resources and funding to allow tenants to fulfil their responsibilities
- Have access to independent advice and assistance if desired
- Have the opportunity to discuss and consider matters out with the Partnership Forum meeting and given adequate time to do so
- Have the opportunity to attend external events

A true partnership approach has been established over time with mutual trust, open and honest sharing of ideas and a joint commitment to improving services for tenants.

4.7 Tenant Satisfaction Surveys

A range of surveys are in place across Bield and these seek to gather tenant opinion on an ongoing and regular basis, to assess customer satisfaction with service delivery and to identify trends. These include:

- A national survey carried out every three/four years covering a range of service delivery areas
- New Tenant Survey completed by tenants a short period after they take up their tenancy
- Reactive Repairs survey issued to every tenant who reports a repair
- Improvement work survey issued for completion after major works have been carried out at a development or in a tenant's home.
- Adaptation survey issued for completion to tenants who have had an adaptation carried out to their home.
- Annual rent and service charge review consultation

Survey results are collated and considered by Bield to look at ways of improving the service and performance, and gauging areas of concern for tenants. Feedback is reported back to tenants via the Bulletin.

4.8 Tenant's Newsletters

4.8.1 The Bulletin

Bield produces its own newsletter, the Bulletin, three times per year. It provides a range of information relevant to Bield's tenants, staff and service users and keeps them updated on a range of issues. Tenants can also submit items via their Local Manager, Housing Officer or directly to the Business Support team. Feedback from tenant surveys and reports on Bield's performance are included in the Bulletin.

The Partnership Forum can co-opt a member onto the editorial board which oversees the production and content of the newsletter. The Bulletin is available in different formats including community languages, CD, large print etc.

4.8.2 Development newsletters

Interest in producing local and development specific newsletters has increased and staff and budgetary resources to support this will be considered and developed.

4.9 Annual Report

An Annual Report, including key performance information, is produced every year in accordance with our regulatory requirements and in consultation with our tenants and is then made available to tenants.

4.10 Membership of Bield

Bield has a Membership Policy which gives all tenants the opportunity to become a member of Bield by completing a membership form and returning this with £1 membership fee to Bield's secretary. This provides lifetime membership and the right to attend and vote at Bield's Annual General Meeting each year. A summary of the Policy and a membership form are included in the Tenants Handbook issued to every new tenant at the start of their tenancy.

4.11 Tenant Information

A Tenant Handbook is published and provided to every tenant at the start of their tenancy and aims to support the Tenancy Agreement signed prior to the start of the tenancy. The Handbook is reviewed regularly in consultation with tenants, RTO's and the Partnership Forum. A range of leaflets have also been developed with the aim of providing accessible information to tenants on matters that affect them or their tenancy.

5. Identifying gaps and addressing barriers to Tenant Engagement

5.1 Identifying gaps

As part of our analysis of current tenant engagement activity and through feedback we have identified the following options that could be developed to widen the range of opportunities to engage with tenants. All are at a proposal stage and will need researched and progressed to see how they can be developed. Other options and suggestions will develop during the course of the Strategy and Bield are committed to addressing these as they arise.

5.1.1 Local and Regional Networks and Groups

Bield recognise that there is a gap in our Tenant Engagement structure. There are opportunities for tenants to be involved at individual level and then at strategic level, however tenants have expressed an interest in developing a regional network of groups that would allow tenants to meet locally to discuss issues that are relevant to a wider group of tenants. The development of a regional network would allow tenants who are able and willing to travel short distance to participate more fully than they can do so at present.

5.1.2 Ambassador Programme

As part of Bield's commitment to promoting tenant engagement it is recognised that peer support is important to encourage and develop an understanding of how tenants can influence and shape the organisation. The opportunity to develop an Ambassador's programme will be explored with the Partnership Forum.

5.2 Barriers to engagement

There are number of known barriers that prevent or discourage tenants from becoming involved which Bield will work to address however other barriers may exist and we must be positive in identifying and addressing them as they arise.

5.2.1 Service change

Bield recognises that there are occasions when service changes that impact on tenants are driven by external factors over which we have limited control. In these circumstance tenants may have little opportunity to influence the outcome of the decision or review however can have a significant role in agreeing how and when we communicate service change to our tenants and what support we offer them. We also recognise that tenants may need external support at that time and we will endeavour to provide opportunities for this to be accessed. We are also committed to ensuring that tenants will be fully informed at the earliest opportunity, to reduce unnecessary anxiety and to ensure transparency in how we operate.

5.2.2 Dispersed nature of our stock

Bield's stock is dispersed across Scotland and this can make it difficult to coordinate events across wider areas involving greater travel time to events. It also means that tenants may have less of a sense of community with other Bield tenants who live in geographically different areas.

5.2.3 Age and Health

The majority of Bield's tenants are older people, over the age of 60. Health and mobility can therefore limit their ability to participate and attend meetings.

5.2.4 Financial

As many of Bield tenants have limited incomes, the perceived cost of attending meetings can prevent tenants from expressing a desire to become involved.

5.2.5 Confidence

This is a nationally recognised barrier to engagement. Confidence in older people can diminish due to age, health and social isolation. Confidence in the organisation and the effectiveness of engagement can also deter tenants from becoming involved.

In developing methods of consulting our tenants, Bield will need to be mindful of the above and consider ways to address these in a sensitive and supportive way. These will include payment of expenses to attend meetings, the use of technology (digital inclusion) to improve communication and reach a wider audience, and the support of volunteers.

6.0 Developing Tenant Scrutiny

The Scottish Social Housing Charter requires that Registered Social Landlords involve tenants and service users in the scrutiny of their performance. Bield is committed to researching, developing and implementing a mechanism over the next three years for tenants to scrutinise Bield's performance and to promote and achieve continuous improvement.

A project plan will detail timescales, resources and communications, training and support that will be available to achieve this goal and will be monitored by both the Partnership Forum and the SMT.

7.0. Independent Advice and training

Training and independent advice for tenants wishing to participate to develop their knowledge and skills is essential. Training can be organised for new or existing groups such as the RTO's and the Forum either in-house or by outside agencies such as the Tenant Information Service (TIS), Tenant Engagement Advisory Service (TPAS) or Age UK. The Tenant Engagement Officer will support tenants to identify and access appropriate training including attendance at relevant conferences and training needs will be taken into account annually when setting the tenant engagement budget for the year ahead. In addition Bield will explore the benefits of hosting a tenants conference, bringing together a range of tenants from across the organisation to share ideas and shape services.

All new tenant members of the Partnership Forum will receive induction training prior to attendance at their first meeting. At the induction meeting the role and

background of the Forum, the role and responsibilities of Forum members, the format of meetings and the links and relationships between the Forum, operational departments and committees and Board will be discussed.

8.0 Resources to Implement the Strategy

Tenant Engagement is viewed as an integral part of Bield’s service delivery and all operational staff have a role to play in promoting and encouraging engagement. Staff costs will not be allocated to the tenant engagement budget however the budget will be set annually to ensure that supplementary resources required to deliver effective tenant engagement are available. Additional support from external agencies will be considered and budgetary provision made for this ensuring that tenants have access to independent advice and support. The draft budget will be discussed and approved by the Partnership Forum who will also review and monitor budget spend. Details of the annual budget will also be published in the newsletter.

9.0 Monitoring of the Strategy

To ensure that the Strategy is meeting its objectives, it is important that progress is monitored on a regular basis. Bield will agree key performance indicators as part of the Business Strategy that will be measured on an ongoing basis and reported against. These indicators will include those set by the Scottish Social Housing Charter that relate to engagement as follows:

Indicator number	Description
3	Percentage of tenants who feel that their landlord is good at keeping them informed about their services and decisions
6	Percentage of tenants satisfied with the opportunities given to them to participate in their landlord’s decision making processes

Performance against these indicators will form part of the annual return to the Regulator and the annual performance report to tenants. Progress against the Tenant Engagement Action Plan will be monitored within Housing Services and by the Partnership Forum on an annual basis.

Statistical information will also be gathered on a quarterly basis to collect information regarding local Tenant Engagement activities. This will be used to identify trends and gaps in engagement and to provide evidence of Tenant Engagement activities to the Scottish Housing Regulator if required. Statistical information gathered will include:

- The number of local Scheme Meetings held
- The number of Partnership Forum meetings held
- The number of Registered Tenants Organisations in place
- The number of Focus group meetings held
- the number and type of surveys conducted and a record of response rates

This will be collated monthly and presented to the Partnership Forum, Senior Management Team (SMT) and the Board on an annual basis. Operational KPI's and targets will be set as a measure of Tenant Engagement activity and will be reviewed on an annual basis

10.0 Governance

True tenant empowerment means involving tenants in decision making at the highest level. At present two members of The Partnership Forum have full membership of the Board and therefore have representation at the highest level of Bield's decision making process. In addition, one member is also on the Remuneration Committee. As Bield's revised governance arrangements bed in, structures will be developed and put in place to support tenant involvement at this level. Bield will also look to develop a training and support mechanism to ensure that engagement at this level is meaningful and accessible.

An annual report on Tenant Engagement (see above: *monitoring*) will be developed for the Board's consideration each year to demonstrate activities that have taken place during the year, the feedback received and how this can be used to influence and improve the service our customers receive. We will also be able to evidence to the Regulator via our governance structure and reporting mechanisms that tenant feedback has been fed back into our process reviews and improvements generated.

11. Review of the Strategy

The Tenant Engagement Strategy will be reviewed on a five yearly basis in consultation with tenants. Bield recognises that in the interim, tenant engagement practices will be developed and improved in response to tenant feedback and may extend beyond those specified above.

Appendix 1 - Partnership Forum Constitution (includes expenses Policy, ballot process and geographical area for election purposes)

Appendix 2 – Partnership Forum Code of Conduct

Appendix 3 – Tenant Engagement Action Plan 2013-16

12.0 Commitment to Equality and Diversity

Bield is committed to advancing equality of opportunity, eliminating unlawful discrimination and fostering good relations between people who share a protected characteristic and those who do not (protected characteristics are: age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex and sexual orientation).

Our goal is to ensure that these commitments, reinforced by our values are embedded in our day to day working practices with all our customers, colleagues and partners.

13.0. Links to other Corporate Documents

The Tenant Engagement Strategy is linked to:

- Bield's Business Strategy;
- Communication Strategy;
- Marketing Strategy;
- Equality and Diversity Policy;
- Standing Orders, and Governance structure of the organisation;
- Membership Policy; and
- Partnership Forum Constitution