BOARD REPORT

Meeting:	**SALVATION ARMY HOUSING ASSOCIATION BOARD**
Meeting date:	27th July 2017
Agenda item:	

For Discussion

Title & Date of Report:	Together for Residents (T4R) Co-regulation Report. 12th July 2017

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This report relates to the following residents: (delete the ticks that don't apply)

General Needs	✓	**Agency Managed Services**	✓
Older People's Services	✓	**Homeless (Direct)**	✓

Give a <u>brief</u> explanation if the report doesn't relate to any resident group(s)

SUMMARY OF PAPER

This paper provides:

- Background contextual information regarding the formation of T4R as part of the saha / Chapter 1 merger.

- An overview of the current scrutiny plan.

- Feedback from the recent T4R scrutiny review that looked at customer surveys used within both saha and Chapter 1, associated recommendations and management responses. In the topic reviewed, T4R provide an overall rating of **Adequate.**

1   **INTRODUCING TOGETHER FOR RESIDENTS (T4R)**

1.1   Prior to the merger, both saha and Chapter 1 has established resident co-regulation models in place, Resident to Resident (R2R) within Saha and Get Involved within Chapter 1.

1.2   Early in the merger development it was identified that a single co-regulation model would be required moving forward in order to ensure continued compliance with the HCA Tenant Involvement & Empowerment Standard. Both of the groups came together late December 16 / early January 17 to commence development of new combined approach that built upon the strengths of the combined existing arrangements.

1.3   A revised model was developed and was submitted to the merger steering group in late January 2017. (Appendix 1). Residents subsequently came together and agreed the new Together for Residents (T4R) identity for the new group and agreed a programme of scrutiny for 2017.

1.4   The format of the new group is similar to the co-regulation approach that R2R undertook. The group select the topics that they would like to look at during the year and comes together either face to face or via video link to scrutinise the evidence and make recommendations to be implemented. The approach now has an increased social media element to its communications.

2   **T4R SCURTINY PROGRAMME**

2.1   The T4R scrutiny group considered a wide variety of potential scrutiny topics and agreed that, during early stages, this would involve some comparison of the differing approaches within the two organisations, and that in doing so the recommendations should support the merger activities.

2.2   The agreed scrutiny programme is as follows:

        • May: **Customer Surveys** – How surveys are used across the two

organisations and how this can be improved.

- September: **Feeling Safe** – Dealing with difficult situations, responses to ASB, Safeguarding and staying safe online.

- January: **Communications** – Communications with residents including digital and analogue methods.

3   **SCRUTINY MAY 2017 – CUSTOMER SURVEYS**

3.1   **SCRUTINY SCOPE**

3.2   The panel looked at:
- Do the surveys fit with the needs of the organisation?
- Do we over survey our residents?
- How the information gathered from the surveys is used to improve our services?
- Do we offer enough options for our residents to answer surveys?
- Do we use the diversity information on record when sending out surveys?
- How is the information then fed back to our residents?

3.3   **SCRUTINY METHODOLOGY**

3.4   The T4R resident inspectors decided that a desktop review would be the best approach for gauging residents' views on this topic. The scrutiny meetings took place via video link at saha's Head Office in London and Regional Office in Bolton on 24th May 2017.

3.5   In order to develop an informed understanding of the various elements involved in customer surveying, the panel assessed and reviewed the following key documentation and processes:

Customer Service Centre Surveys:
Exit surveys

Gas servicing surveys
Repair surveys
New tenant surveys
Consolidated survey results
Board excerpt – showing details of survey results that are fed back to the Board.

Asset Management Surveys:
New build survey – including the analysis of the Wilshire Place survey
Planned maintenance survey
Pre start residents' letters
Gas letter log
Resident Involvement database results

Get Involved Team:
Chapter 1 satisfaction survey
STAR survey
Saha offer
Impact monitoring sheets
Saha resident involvement database
Customer panel surveys

Directly Managed Survey Examples (i.e. Newhaven):
Support survey – including analysis
Laundry / Payphone ad hoc survey
Scheme inspection

3.6   T4R also looked at where we publish details gathered in these surveys including The Loop and the saha website KPI's, customer profiling headers and examples of where we have used the profiling information available to contact residents in their preferred ways.

3.7   During the meeting T4R also reviewed 'The saha offer' and the estate management policy.

4   **SCRUTINY FINDINGS**

4.1 **Exit surveys**
T4R questioned why customer services make the calls to gather this feedback and asked if there was not a more efficient way of completing the survey and gathering more feedback.

4.2 **Volume of calls made by CSC**
One of the observations made by T4R was the volume of outbound calls made by saha's CSC. (In the last financial year 30,089, total outbound calls were made by CSC with 21,041 by the CSC contact team) T4R are aware that CSC will make outbound calls other than making survey calls (chasing contractors etc.) but they did query the amount of surveys completed (843 service surveys completed) to calls being made as in their opinion the amount of surveys completed were low and possibly not the best use of their time, they also noted that the surveys completed were mainly repair surveys, 70% of surveys completed by CSC.

4.3 Some of the panel members expressed that they would not answer the phone to a number they did not know which may be the case with other residents.

4.4 Most residents agreed that they were quite confident with text surveys that they receive from other services/providers and felt that these were not intrusive, although they did question who would be charged for the text surveys, i.e. does this charge go to the person commissioning the survey or is it the recipient.

4.5 T4R commented that the profiling information seems to be incomplete with the majority of answers being stated as incomplete.

4.6 **Asset Management Surveys**
T4R liked the presentation and style of the asset management planned maintenance surveys as they were clear and easy to read.

4.7 The use of smiley faces in surveys was well received with praise as it makes it easier from a resident's point of view to help fill in a survey.

4.8 T4R were happy with how asset management obtain their feedback on new build

properties, to use in future builds, but did ask if it would be possible for a resident to be part of the project group for a new build scheme to help offer a resident's perspective and to help feedback to other residents.

4.9 **Get Involved Surveys**
There was substantial discussion regarding the six monthly Chapter 1 survey and the saha quarterly STAR survey. T4R felt that the saha quarterly approach does help to give a good idea of resident satisfaction with the services that they receive. After reviewing the STAR survey T4R were happy to recommend that the STAR survey is used for all residents across both organisations.

4.10 **Resident Involvement Database**
T4R residents reviewed the saha resident involvement database and were impressed with what evidence they saw. They thought it was an important database that shows the level of how residents can get involved to help shape services.

4.11 The scrutiny panel discussed the promotion of the T4R group amongst other residents within saha and Chapter 1 services. The panel proposed that T4R undertake visits similar to the R2R Roadshows that took place in previous years, to help boost the profile of T4R and gather feedback from residents.

4.12 T4R did ask if a reply envelope was sent with all the surveys that are posted as this may deter some people from answering if not.

4.13 **The Saha Offer**
The saha offer was introduced to the T4R panel with an explanation of the history behind local offers, resident road shows and the subsequent amendment to the offers to create 'The saha offer'.

4.14 Feedback received from the panel was very positive in terms of the offers and how saha is perceived to be achieving these. Chapter 1 residents were keen for this to be rolled across to the Chapter 1 services also.

4.15 **Estate Management Policy**
Saha's Estate Management Policy was reviewed by the T4R panel. The only

recommendation to come out of the review was for more clarity on the paragraph relating to parking at a service. The panel felt that the policy was more geared towards general needs schemes, and at some services there is limited parking availability for residents as this is usually awarded to staff.

4.16 **Overall approach to using surveys across the organisations**

T4R reported that they were impressed with the structure of the surveys used although they felt that there is definitely a wide margin in terms of the volume of surveys completed by saha to those completed by Chapter 1.

4.17 Currently saha have a number of surveys that they use across the organisation, across a range of departments whereas Chapter 1 primarily only survey their residents every 6 months with the satisfaction survey.

4.18 The panel felt that there needs to be some work done to create a balanced approach so that residents do not start to have survey fatigue, this will hopefully help to improve survey results as residents will not feel that they are repeating surveys.

4.19 The panel made a number of recommendations in terms of creating efficiencies in time when surveying our residents, they also made a recommendation for increased resident involvement in asset management activities

5 **ASSURANCE RATING**
Overall, from the scrutiny T4R panel rated the organisations approach to customer surveys as: **Adequate** with a substantial number of predominantly **Housekeeping** recommendations, some of which have a more strategic element that T4R would be keen to see implemented as part of the on going merger activities.

These recommendations, with management responses are outlined in the following table.

6 **RECOMMENDATION / CONCLUSION**

6.1 The Board is recommended to note content of this report.

Recommendations with Management Responses

	Comments Taken From Performance Reporting	Respondent (Name and Job Title)	Management Response To Recommendations	T4R Priority Levels	Target Completion Date
1	Look at the process in which exit surveys are completed, could these be done with the housing officer during the final inspection of a property before a resident moves out.	Stephen Bate – Head of Customer Services	Yes we do already attempt this for all pre-termination inspections when access is allowed and dependant on how a tenancy is ended.	Housekeeping	In place
2	Use calls from the CSC as a last resort to obtain feedback from surveys, look at other options including texts, emails, survey monkey and possibly using the contractor to gather satisfaction with repairs	Stephen Bate – Head of Customer Services	Agreed- We will be taking forward a comprehensive digital transformation following the Chapter 1 merger and we will be looking to move away from calls to other methods of receiving feedback that are more convenient for customers	Housekeeping	As per digital transformation timescales
3	Where smiley faces are used in surveys use a colour scheme i.e. green to red to engage the resident more in the feedback.	Peter Latham – Head of BSI	Agreed – surveys that are created in future will have the colour coded smiley face rating system.	Housekeeping	In place
4	To include where possible a resident representative during the commission of a new build project.	John MacFarlane – Head of Capital Projects	Agreed in part -The logistics of this may be difficult. Saha look into many opportunities but not all of these come to fruition.

Our suggestion would be to have a scheme review meeting when the scheme is signed off before planning that would involve residents and staff to gather their feedback. | Housekeeping | Procedure in place from Oct 17 |
| 5 | Use the STAR satisfaction survey with all residents to gather feedback on service satisfaction. | Peter Latham – Head of BSI | Agreed – The STAR satisfaction survey will continue to be rolled out to all residents. | Housekeeping | In place |

	Comments Taken From Performance Reporting	Respondent (Name and Job Title)	Management Response To Recommendations	T4R Priority Levels	Target Completion Date
6	Look to adopt a resident involvement database for Chapter 1 to log all Get Involved activities, to continue to use the impact survey to ensure that residents are satisfied with the involvement methods and have the opportunity to give feedback.	Peter Latham – Head of BSI	Agreed – We will look at the RI database inline with our digital inclusion project. The impact surveys will be implemented along side this. In the interim we will look at other ways to record the information.	Housekeeping	As per digital transformation timescales
7	Conduct T4R roadshow visits to saha and Chapter 1 services to promote T4R and obtain feedback from residents.	Peter Latham – Head of BSI	Agreed – Road shows are planned for later in 2017.	Housekeeping	Dec 2017
8	Increase the number of The Loop newsletters that are printed so that each resident receives an individual copy	Peter Latham – Head of BSI	Not Agreed – The most significant cost of the newsletter is print and postage and to do this would increase costs significantly. We will be taking forward a comprehensive digital transformation following the Chapter 1 merger, within this we will be seeking to innovate the methods that news and information can be circulated to customers.	Housekeeping	
9	Increase the profiling data held on residents to ensure that we are confident that the services we are providing are meeting the needs of residents.	Stephen Bate – Head of Customer Services	Agreed - Joint work required and discussed with Chapter 1 colleagues. Revised approach to be put in place	Housekeeping	Nov 17
10	When asking for gender on profiling information; recognise that people may identify as other than male or female and offer more options.	Stephen Bate – Head of Customer Services	Agreed - This will be updated as requested on survey forms	Housekeeping	Aug 17
11	Look into whether contractors use PDA's that could be used to gather feedback on repairs.	Stephen Bate – Head of Customer Services	Agreed – we will look into the feasibility of this with our contractors and consider if this can be built in to future contract specifications.	Housekeeping	Feb 18
12	Make all surveys available for completion on the saha website.	Peter Latham – Head of BSI	Agreed – Surveys will start to become available as and when they are live.	Housekeeping	Aug 17
13	Include a prepaid envelope with all surveys.	Stephen Bate – Head of Customer	Already in place for postal surveys	Housekeeping	In place

	Comments Taken From Performance Reporting	Respondent (Name and Job Title)	Management Response To Recommendations	T4R Priority Levels	Target Completion Date
		Services			
14	Look at creating a combined supported survey that would go to all supported services on either an annual / bi-annual basis that would ask specific questions relating to the service, this would help to gather service specific questions that are not covered in the STAR survey and would possibly help alleviate ad-hoc surveys being completed.	Vina Mistry	Agreed – There are several areas which could be identified that are relevant across all our supported services.

This would alleviate resident apathy in relation to completing differing surveys which cover similar elements. This streamlining will provide the data required for internal monitoring and to meet contractual requirements | Housekeeping | April 18 |
15	Look at standardisation of all surveys across the organisation. To make sure wording, imagery, branding etc. is the same so that residents would be aware when it is opened/looked at that this is a saha/Chapter 1 survey. Look at having these come through the Get Involved team so that there is a central control to how they are processed.	All depts	Agreed – We will look at creating a survey brand document that will set out how a standard survey should look.	Housekeeping	Nov 18
16	Include on all surveys where the feedback will be used and how this will be reported back to increase communication channels.	All depts	Agreed – This will form part of the survey brand document.	Housekeeping	Sept 17
17	Create where possible a survey timetable, so we can help pace where surveys will be going out to residents, reducing survey fatigue but allowing departments to look at where conjoined working may be possible.	Peter Latham – Head of BSI	Agreed- We will be taking forward a comprehensive digital transformation following the Chapter 1 merger and we will be looking to move away from calls to other methods of receiving feedback that are more convenient for customers	Housekeeping	As per digital transformation timescales
18	Continue with the Chapter 1 annual report poster but roll this out to all services so that residents receive the highlights from the annual report in an easy to read format.	Peter Latham – Head of BSI	Agreed – This will be undertaken once the annual report is concluded	Housekeeping	Aug 17

	Comments Taken From Performance Reporting	Respondent (Name and Job Title)	Management Response To Recommendations	T4R Priority Levels	Target Completion Date
19	Use 'The saha offer' across the whole of the organisation	Peter Latham – Head of BSI	Agreed subject to Board approval	Housekeeping	Oct 17

Appendix 1:

Co-regulation Model

The purpose of this document

This document sets out how we feel residents can get involved in inspecting and giving feedback on the services that saha delivers, identify areas for improvement and influence how services should be delivered in future. It's based on feedback residents have given us and builds on what we currently have in place for resident feedback.

Regulatory requirements

Saha is accountable to its residents for the services it delivers and for dealing with any actual or potential problems that may arise from time to time. This is the basis of what we call "co-regulation".

Our regulator – the Homes and Communities Agency (HCA) – has set regulatory standards that are classified as either "consumer" or "economic" so that residents know the outcomes that are expected. This also helps to support co-regulation where, in relation to the consumer standards, people such as residents, MPs and elected representatives have a role in checking that these standards are met for the greater good of all residents.

The services that we deliver are covered by the consumer standards. Helping us to regulate these standards, i.e. assessing how well we meet these standards and where we can improve, is an important role we're looking to residents to help us fulfil.

The consumer standards are set out at the end of this document.

Our model and proposal

We want residents from each of our different resident groups to help us to assess how our services meet the consumer standards. The way in which this is carried out will be developed with residents.

Our resident groups are

- homeless people in agency managed Lifehouses and schemes;
- residents and families in general needs street properties;
- homeless people in foyers and projects and;
- sheltered and other housing for older people.

In foyers, for example, assessment could be through existing residents meetings. With general needs residents this could be through some form of interaction with the closed facebook groups, ad hoc surveys or conversations during coffee mornings.

We see the Scrutiny Panel having a role assessing compliance against the consumer standards and our performance on the things that matter to residents. We'd also like to empower residents taking part to go further and make suggestions for how services

can be improved and present recommendations to the saha Board. As the saha Board is ultimately responsible we think it's important to give residents a voice at the highest level.
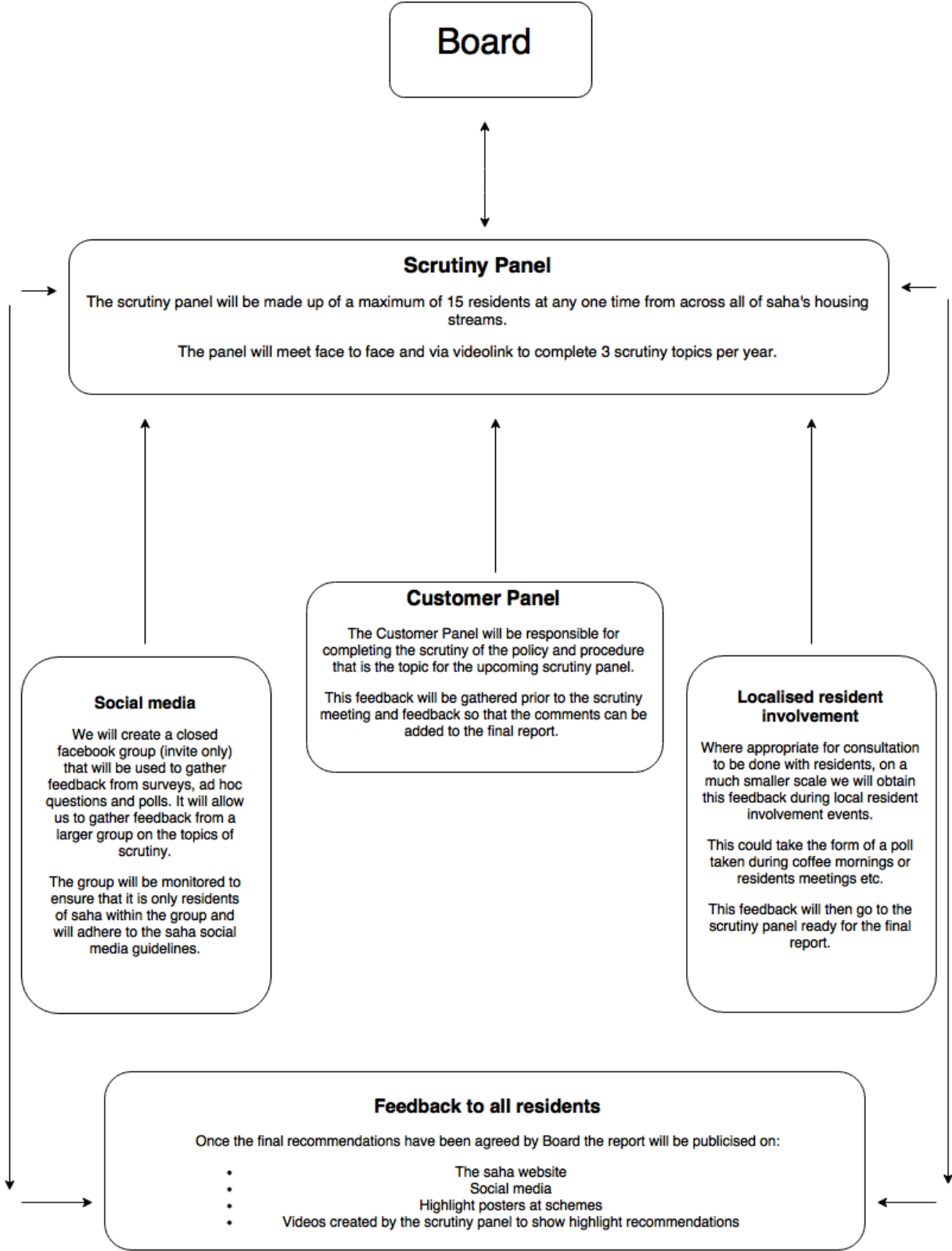
On the next page we have summarised the different levels of scrutiny and feedback we're suggesting.

We will have a core group of residents that will sit on the scrutiny panel. We see this as being a maximum of 15 residents from across all of our housing streams.
The group will meet face to face and via video link from Bolton to Head Office and will scrutinise the topics at hand and compile the final reports of recommendations to Board.

We will have a customer panel made up of an unlimited number of residents from across all of our services who will be responsible for scrutinising the policy and procedure for the scrutiny topic at hand. This information will then be sent to the scrutiny panel prior to the meeting for the recommendation to be included in the final report.

We propose that staff from our Get Involved team are responsible for the support and administration to the group. In addition we see the Panel having its own financial budget to cover the expenses that occur from its activities. We also see residents taking part being supported through provision of equipment such as computers if necessary.

Model for Resident Involvement in the Co-regulation of Saha

Board

Scrutiny Panel

The scrutiny panel will be made up of a maximum of 15 residents at any one time from across all of saha's housing streams.

The panel will meet face to face and via videolink to complete 3 scrutiny topics per year.

Customer Panel

The Customer Panel will be responsible for completing the scrutiny of the policy and procedure that is the topic for the upcoming scrutiny panel.

This feedback will be gathered prior to the scrutiny meeting and feedback so that the comments can be added to the final report.

Social media

We will create a closed facebook group (invite only) that will be used to gather feedback from surveys, ad hoc questions and polls. It will allow us to gather feedback from a larger group on the topics of scrutiny.

The group will be monitored to ensure that it is only residents of saha within the group and will adhere to the saha social media guidelines.

Localised resident involvement

Where appropriate for consultation to be done with residents, on a much smaller scale we will obtain this feedback during local resident involvement events.

This could take the form of a poll taken during coffee mornings or residents meetings etc.

This feedback will then go to the scrutiny panel ready for the final report.

Feedback to all residents

Once the final recommendations have been agreed by Board the report will be publicised on:

- The saha website
- Social media
- Highlight posters at schemes
- Videos created by the scrutiny panel to show highlight recommendations

Resident's skills and abilities

For residents who are interested in inspecting services and giving feedback we have set out below the skills and abilities they will either have or be prepared to develop through learning and training over time.

Commitment

- Uphold saha's aims and values
- Treat people fairly and be inclusive
- Make time for resident involvement activities

Self management and development

- Prepare for, and attend, meetings*
- Be open to new learning
- Willing to undertake training

Team work and decision making

- Work as part of a team*
- Allow others to contribute and see their views
- Not let personal matters interfere with judgement
- Make reasoned and thought through views
- Be enthusiastic
- Make and support collective decisions*

Analysis

- Look at information and see what the key issues are
- Read and understand reports
- Probe and ask questions
- Problem solve
- Weigh up the pros and cons

Communication

- Good listener
- Confident speaker
- Contribute in discussions
- Share ideas
- IT skills – computer and internet

Knowledge (in relation to their resident group)

- saha services
- Service standards
- saha in general

Items marked with an asterisk* are not required if only interested in taking part in resident involvement activities on the ground and not as part of the main Panel.

What residents can expect in return

Inspecting services and giving feedback may be challenging but it can also be rewarding and helps for the greater good of all residents. Here is a list of things residents can expect in return from saha:

- ➢ Training courses to help you develop your skills
- ➢ All reasonable out of pocket expenses paid for
- ➢ Travel and accommodation arranged and paid for when required
- ➢ Support from staff
- ➢ A chance to get out and about
- ➢ An opportunity to help manage a multi million pound social business
- ➢ Personal satisfaction – hopefully!

The work of the Scrutiny Panel

Residents have previously expressed a desire to want to meet regularly to discuss the services they receive and how these can be improved. We believe a Scrutiny Panel could serve this purpose as part of our approach to resident involvement.

We've set out below how we think the Scrutiny Panel would work. This is an initial plan and we are keen that this is tailored to meet resident's preferences.

Meetings
- ➢ Three times a year including an AGM that will set the topics of scrutiny for the year.

Attendance
- ➢ We suggest a maximum of 15 residents from a combination of all our services with relevant Saha staff in attendance to answer questions and be accountable when required.

Scrutiny Panel Business
- ➢ Agree an annual programme and scope for inspection and feedback
- ➢ Review and discuss findings from activity during the quarter
- ➢ Seek explanations for areas of poor performance identified through inspection and feedback
- ➢ Review key performance indicators
- ➢ Review complaints and saha's handling of them
- ➢ Agree recommendations to be made to the Board for how services can be approved.