



Customer Engagement Strategy

Policy Ref: CS1

Prepared By	Chief Executive
Date of Review	January 2024
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Reviewed By	PHA Board

Section 1 - Introduction and Aims

- 1.1 Partick Housing Association (PHA) aims to provide customers with the opportunity to shape the services that we provide. Customer engagement is part of our ethos and how we operate.
- 1.2 We have put arrangements in place so that customers can engage effectively and help us to challenge, change and improve services. This strategy is about how we can optimise customer engagement activity.
- 1.3 Effective customer engagement can help us to achieve:
- Strong partnership between customers and PHA;
 - Accountability to customers;
 - Service improvements;
 - Customer influence and empowerment;
 - Increased customer satisfaction; and
 - Value for Money.
- 1.4 There are ten widely accepted customer participation principles, which we endorse. These are:
- (i) ensuring trust between PHA and its customers;
 - (ii) acknowledging that participation is a continuous process of sharing information, ideas and power;
 - (iii) encouraging all parties to contribute to the agenda;
 - (iv) ensuring decision-making that is open, clear and accountable;
 - (v) allowing enough time for all views to be properly considered;
 - (vi) ensuring that tenants' organisations can operate independently from PHA;
 - (vii) having good working relationships which evolve as customers' requirements and expectations change;
 - (viii) providing resources for training, support and servicing of any groups;
 - (ix) tailoring our strategy to suit the individual needs of our communities; and
 - (x) ensuring that our strategy is inclusive of all customers living within the community and, in particular, observes the principles of equalities.

Section 2 - Regulatory and Corporate Framework

2.1 The Scottish Housing Regulator

- 2.1.1 PHA, as a Registered Social Landlord (RSL) is regulated by the Scottish Housing Regulator (SHR). Its statutory objective is to safeguard and promote the interests of current and future tenants, homeless people and other people who use services provided by social landlords. The SHR monitors, assesses, compares and reports on landlords' performance of housing activities, financial well-being and standards of governance. It can intervene, where appropriate, to secure improvement and protect the interests of tenants and other service users.

2.1.2 The SHR sets Regulatory Standards that we must meet and these are reviewed and updated from time to time. It is for PHA to decide how we meet these standards and comply with guidance, based upon our local context and individual circumstances, which is set out in this Strategy. We are responsible for the standards of conduct within our organisation and are publicly accountable to our tenants, other service users, funders and other stakeholders for the governance decisions we make.

2.1.3 One of these Regulatory Standards sets out our specific requirements in relation to customer engagement:

“The RSL is open about and accountable for what it does. It understands and takes account of the needs and priorities of its tenants, service users and stakeholders. And its primary focus is the sustainable achievement of these priorities.

The RSL gives tenants, service users and other stakeholder’s information that meets their needs about the RSL, its services, its performance and its future plans”.

2.2 The Scottish Social Housing Charter

2.2.1 As required by section 31 of the Housing (Scotland) Act 2010, Scottish Ministers in the Scottish Social Housing Charter (SSHC), set the standards and outcomes that all social landlords should achieve when performing their housing activities.

2.2.2 The Charter helps improve the quality and value of services that social landlords provide, and supports the Scottish Government’s National Outcomes on communities, environment and human rights. The Charter does so by:

- stating clearly what tenants and other customers can expect from social landlords, and helping them to hold landlords to account;
- focusing the efforts of social landlords on achieving outcomes that matter to their customers; and
- providing the basis for the SHR to assess and report on how well landlords are performing (this assessment enables the SHR, social landlords, tenants and other customers to identify areas of strong performance and areas need improvement).

2.2.3 The Charter contains a number of outcomes and standards that social landlords must aim to achieve, including the customer/ landlord relationship:

- Equalities – social landlords perform all aspects of their housing service so that: they support the right to adequate housing; and every tenant and other customer has their individual needs and rights recognised, is treated fairly and with respect, and receives fair access to housing and housing services;
- Communication – social landlords manage their businesses so that: tenants and customers find it easy to communicate with their landlord and get information they need about their landlord, how and why it makes decisions and the services it provides; and
- Participation – social landlords manage their businesses so that: tenants and other customers are offered a range of opportunities that make it easy for them to participate in, and influence their landlord’s decisions at a level they are comfortable with.

2.2.4 The Strategy details how we will do this in conjunction with our customers. Our engagement activity is underpinned by a commitment to pursuing continuous improvement and value for money.

2.3 Partick Housing Association’s Group Corporate Plan

2.3.1 Our Group Corporate Plan sets out who we are and what we do, our vision, values and objectives.

Our purpose

We provide quality, affordable homes and services in the West End of Glasgow.

Our vision is:

Making homes and building communities.

Our values:

- Customer focus;
- Inclusion;
- Trust; and
- Innovation.

Our aims are:

- to provide quality, affordable homes and excellent services to our customers;
- to support our communities and improve our environment; and
- to be a respected and proactive organisation, with effective governance and staff.

2.4 Other Links

- 2.4.1 This Strategy seeks to comply with all relevant legislation and regulatory standards as well as relevant best practice. Customer engagement is core to how PHA works and therefore links across a range of our policies, strategies and procedures.

Section 3 – Understanding our Customers

- 3.1 Through our Customer Satisfaction Surveys we seek to understand who our customers are and their priorities so that we can reflect their changing needs and expectations in what we do and how we do it.
- 3.2 We want to involve, empower and include customers in how we operate and identify ways to broaden access and engagement with customers in ways that suit them.
- 3.3 The Association has a number of customers, including the following.

External Customers	Tenants, factored homeowners, shared owners and housing applicants
Internal Customers	Board and staff
Stakeholders	Partners, contractors, consultants, Scottish Government, local authority and Scottish Housing Regulator

- 3.4 We aim to be a customer-focused and proactive organisation, so we use ‘customer insight’ to better understand the views and experiences of customers in improving services and making an impact. Customer insight entails:
- using information about customers to better understand who they are, their needs, wants, expectations and experiences; and
 - actively applying this understanding in the design and delivery of services that better meet customers’ needs.
- 3.5 Effective use of customer insight helps us to:
- deliver tailored services for different individuals/groups’ needs where appropriate;
 - target resources towards priority groups or services; and
 - target consultation and provision of information.
- 3.6 From this, we can:
- deliver services effectively and efficiently; and
 - optimise customer satisfaction.

Section 4 - How We Will Engage

- 4.1 There are various ways in which information can be obtained and passed to customers. The methods we use will depend upon the nature of what we are reviewing and the methods preferred by customers.
- 4.2 We aim to offer customers different ways of engaging in influencing and improving our services, including those customers who may not have previously been involved. As the world changes and modern methods of communication evolve, we look to the most effective and relevant ways of communicating and consulting, including new media and technology where appropriate. Our engagement activities have a clear focus and impact on improving services and will monitor and review the outcomes from engagement activities.
- 4.3 The Association is committed to involving customers in developing and reviewing key policies and other documents that affect them. We use various techniques, such as those described in **Annex A** below, and take all reasonable steps to encourage participation. However we fully respect a customer's right **not** to participate. Where it is clear that an individual customer does not wish to participate, then we will observe this right.

Section 5 - Resources and Training

- 5.1 Our intention is to deliver a Strategy, in conjunction with our customers, which is relevant and achievable. We have an annual budget in place for customer engagement, which is used for agreed activities, training or events.
- 5.2 PHA is committed to ensuring that customers, Board and staff have the necessary skills and knowledge to be involved effectively in what we do. The Association will ensure that they have adequate opportunities to receive the appropriate training and support required. Where tenants decide to set up Registered Tenant Organisations (RTOs), this can be done via a programme agreed at the outset and the appropriate training and support will be arranged.
- 5.3 Many tenants may wish their participation to be outwith the formal structure of an RTO, but the same principles will apply in terms of receiving sufficient support and training to allow contributions to be as effective as possible.
- 5.4 We will regularly review the training requirements of tenants, Board and staff and will request feedback on training needs and satisfaction with training provided.
- 5.5 All service areas within the organisation have a responsibility to ensure that customers have the chance to give views and inform service delivery and decisions. Staff involved will have the necessary skills to support effective customer engagement. We will promote engagement that is customer focused, effective and demonstrates value for money.

Section 6 - How We Will Monitor and Report Progress

- 6.1 We want to have an effective Customer Engagement Strategy so we will monitor, review and measure its effectiveness.
- 6.2 In addition we will report on progress on customer services and customer feedback and what we have done with this.
- 6.3 How we will do all of this is set out below.

Area	How Reviewed and Measured	How Published and Reported
Key Performance Indicators (KPIs)	Performance on the Association's targets relating to all service areas and the SSHC. Our Annual Return on the Charter (ARC) covers key performance indicators and definitions prescribed by the SHR – it is approved by the PHA Board and submitted to the SHR at the end of every financial year.	Articles on website and in newsletters. Annual performance report. ARC data is publicly available on the SHR's website to review and compare our performance against that of all Registered Social Landlords (RSLs).
Customer Complaints	Performance against targets for Stage 1 and Stage 2 Complaints.	Articles on website and in newsletters. Annual performance report.
You Said, We Did	Report outlining customer feedback received from routine independent monitoring and complaints data and how this has been used to inform and improve services.	Articles on website and in newsletters. Annual performance report.
Annual Performance Report	Annual report detailing performance results against Scottish Social Housing Charter outcomes. Will show 3 years trend data where available.	Annually to all tenants. Annually on website.
Board Agendas and Minutes	Publish non-confidential Board minutes.	Website following each meeting.
SHR Annual Assurance Statement and Engagement Plan.	Annual Assurance Statement submitted to the SHR and our Engagement Plan from the SHR.	Available annually on our website and the SHR website.
Policies	Produce summaries of key policies and advise that further details are available upon request.	Website as updated.
External Audit Report	The Association's Audit Summary Report will be available on request. The external auditor will present the audited accounts at the AGM.	Annually.
Internal Audit Work Programme	3-yearly programme of works in place. Reviewed annually by Auditor and Audit & Risk Committee.	Programme reviewed annually by Audit & Risk Committee and noted by Board.

- 6.4 As a not-for-profit organisation, managed by voluntary Board members, PHA aims to conduct our affairs in a transparent manner. In meeting our commitment to openness we will make the following information available.

Annual Accounts	Available to members and interested parties on request.
Policy Documents	Policy documents (in summary and in full) are available to customers and interested parties on request. The Association will also provide relevant summary policy information in our newsletters and on our website.
Comments, Compliments & Complaints Policy	Displayed in our office reception areas and on our website, copies provided on request to the public and those receiving a service from, or providing a service to, the Association.
Equalities Policy	Provided to staff, contractors and consultants employed by the Association and available to customers and interested parties on request.
Scottish Housing Regulator Information	Available on the Scottish Housing Regulators' website are details of our Engagement Plan, Annual Return on the Charter, Assurance Statement, Accounts and Rules.
Customer Charter & Service Standards	Information available to all customers setting out our customer service principles and service standards.
Consultation and Survey Findings	From time to time PHA will publish (in newsletters and on our website) summaries of findings from surveys and consultation exercises and action plans.
Tenancy Handbook	Handbooks are provided for all tenants and available on the website. Key issues or any significant changes of practice will be highlighted through the newsletter and website.
Factored Homeowners Written Statement of Services	Written Statements of Service are provided to every factored homeowner by Partick Works Limited (PWL) in accordance with the Property Factors Act. Key issues will be highlighted through the PWL website or on request.
Association Rules	The Association's Rules are available for free to every member on joining PHA and will be available to the public to view at the Association's office.
Minutes of Meetings	Non-confidential minutes of meetings of the PHA Board are available on our website.
Access to Information and Privacy	The Association's Privacy Policy, which includes reference to GDPR, explains the kind of information we would normally hold, the rights of individuals to access this information and how to go about doing so. The Policy is available to the public on request.
Alternative Formats and Languages	Information will be in plain language. Translations of documents, policies and procedures can be provided in various languages and other formats such as CD, large print, Braille etc. These can be obtained by contacting PHA's office.

- 6.5 In performing their duties, our staff and Board members may deal with information that is confidential or commercially sensitive. All such information is acquired on trust and PHA recognises that confidentiality is important to tenants and will treat their tenancy information in the strictest confidence under General Data Protection Regulation (GDPR) and in line with PHA's Privacy Policy. This also applies to consultants, contractors and others who have a commercial relationship with PHA.
- 6.6 PHA is bound by the terms of the Freedom of Information Act (but PWL is not).

Section 7 - Further Information

- 7.1 Our Customer Engagement Strategy complies with PHA's Equality Policy to ensure equality of treatment for all customers without discrimination or prejudice.
- 7.2 When organising events we will consider equality and inclusion, so seek to ensure that:
- documents are written using plain language;
 - meeting venues are barrier free and/or can be held online where appropriate; and
 - meetings are held at times and locations/means that are convenient.
- 7.3 This Strategy will be reviewed every three years, but may be amended sooner to reflect changes to legislation, regulation and/or necessary changes identified with our customers.
- 7.4 If you would like any further information on our Customer Engagement Strategy, or you would like to get further involved please to contact us as follows.

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External Customers

How	Who	What	When	Details
<p>1) Registered Tenants Organisations</p>	<p>Tenants Shared Owners Factored Homeowners</p>	<p>Policies likely to significantly affect customers and communities.</p> <p>Changes to rent and service charges.</p> <p>Promotion of RTOs.</p>	<p>Ongoing</p>	<p>PHA can provide support for formally constituted tenant groups. The Housing (Scotland) Act 2001 outlines formal registration criteria and under the terms of the Act, such groups are known as Registered Tenant Organisations (RTOs).</p> <p>These are independent organisations set up to represent tenants’ interests on housing-related matters. The principle focus of such groups must be representing the needs and expectations of tenants within a defined geographic area – shared owners and factored homeowners can also be members, but tenants must form the majority of the membership.</p> <p>PHA currently has no RTOs but has a system in place for formally registering tenant organisations with the Scottish Government and will provide details of this to anyone interested establishing a tenant organisation and becoming registered.</p> <p>PHA provides support for tenant organisations that become registered, which consists of start-up grants for new groups and annual grants for established groups. We will also provide training for groups and free use of premises to hold meetings.</p> <p>RTOs must have a constitution, which includes provisions for electing office bearers, holding Annual General Meetings, etc. Independent tenant advisers will attend on request. RTOs can be wound up and deregistered where they are no longer operational.</p>

How	Who	What	When	Details
2) Customer Advisory Panel	Tenants Shared Owners Factored Homeowners	Services and policies likely to affect customers significantly.	Ongoing meetings	<p>PHA administers the Customer Advisory Panel, formerly known as the Scrutiny Panel, which consists of both tenants and associated homeowners.</p> <p>The programme of scrutiny topics is selected by the Panel members through review of customer feedback and risk registers, with ad hoc items added throughout the year.</p> <p>The Panel seeks to identify key areas for actions/improvements, consider the issues/options, and report on the final proposals/recommendations.</p>
3) Newsletters	Tenants Shared Owners	Newsletter detailing all key updates and service impacts for customers. General updates on news issues affecting customers.	Three Times Yearly	<p>Newsletter for tenants (sent by post to every tenancy and online).</p> <p>Annual Performance Report.</p> <p>'You Said – We Did' section on actions taken to improve service provision following customers comments.</p> <p>Factored Homeowners get relevant ad hoc updates via the PWL website.</p>
4) Letters, emails and texts	Tenants Shared Owners Factored Homeowners	General letters emails and texts providing updates on specific services.	Ongoing	<p>Use plain language.</p> <p>Can be tailored to individual's circumstances.</p>
5) Customer Satisfaction Survey	Tenants Shared Owners Factored Homeowners	Service satisfaction, demographic data, service priority areas, etc.	Every 3 Years	<p>Every three years, PHA/PWL commission an independent organisation to carry out a Customer Satisfaction Survey. One section of the survey will ask customers how they would like to participate, be consulted or be informed, with the preferred methods being reflected in future strategies.</p>
6) Rolling Customer Feedback & Continuous Improvement	Tenants Shared Owners Factored Homeowners	Independent customer feedback survey to establish performance against Service Standards.	Monthly	<p>Carried out by an independent organisation. Details of all customer contacts are collated and provided monthly. Includes all customers who have had a repair, been allocated a new home property, received money advice, had major works completed, and submitted general complaints. Trend information is collated and reported quarterly, including identified service improvements where appropriate.</p>

How	Who	What	When	Details
7) Customer Focus Groups	Tenants Shared Owners Factored Homeowners	Focused short-life reviews of specific service areas, looking at performance, satisfaction, good practice and suggested service improvements.	Ad hoc	<p>PHA administers the Customer Focus Groups, sometimes facilitated by third parties if appropriate. These Groups consist of interested service users, depending upon the area and scope of service review.</p> <p>These short-life groups will focus on one specific topic at a time and set out any findings and recommendations. The topics will be selected by PHA through review of performance results, customer feedback, and business priorities or at the request of others.</p> <p>The membership of each Customer Focus Group might change from one topic to another, reflecting different interests amongst tenants and their capacity to engage.</p>
8) Comments, Compliments & Complaints	Tenants Shared Owners Factored Homeowners	Comments, Compliments & Complaints system in place to allow all customers to give feedback, including making complaint if not satisfied with service.	Ongoing	Comments, Compliments & Complaints Policy and leaflet available to all tenants and factored homeowners. Aligned with Scottish Public Services Ombudsman model guide and references First-Tier Tribunal For Scotland (Housing & Property Chamber).
9) Shareholder Members and Board Members	Tenants Others	Attendance at annual general meetings (and special general meetings). Opportunity to be elected to Board.	Ongoing	Membership Policy sets out criteria for tenants or others to become share members of the Association and role/responsibilities. skills and commitment required of Board members. Code of Conduct for Board Members.
10) Annual General Meeting (and Special General Meetings)	Shareholders	Annual general meeting (and special general meetings) for Shareholder Members.	Annually	Meeting to review past year, note annual accounts, appoint auditors and any other relevant business.

How	Who	What	When	Details
11) Surgeries, Road Shows, and Meetings	Tenants Shared Owners Factored Homeowners	Ad hoc events held in specific areas and/or online to address specific issues.	As required	Focus of customer engagement should be tailored to individual customers and groups and consider equality and inclusion.
12) Local Action Plans	Tenants Shared Owners Factored Homeowners	Ad hoc consultation on specific estate issues.	As required	Process to involve: (1) scoping of issues (including estate walkabouts as required); (2) considering options; and (3) finalising proposals / recommendations. The Association will chair and provide administrative support for developing targeted Local Action Plans (LAPs).
13) Annual Performance Report	Tenants Shared Owners	Annual performance report detailing how PHA is meeting and achieving targets and areas focused on during the year. Also 'You Said, We Did' summary detailing how ongoing customer feedback has shaped continuous service improvements and value for money.	Annually	Performance details. How rent and other money is spent. Details how Scottish Social Housing Charter is being achieved and areas for focus and improvement. Value for Money update.
14) Websites and Social Media	All External Customers	Websites for PHA and PWL, as well as Facebook and Twitter accounts.	Ongoing	Websites available with different functionalities, with main areas being general information on company, reporting repairs, paying rent and factoring fees, etc.
15) Repairs by Appointment	Tenants	Repairs appointment system for tenant customers.	Ongoing	Ability to book appointment times with contractor to have non-emergency repairs carried out at a convenient time where possible.

How	Who	What	When	Details
16) Housing Information	Potential Tenants Homeless Persons	Relevant and up to date information relating to applying for home and options available.	Ongoing	Range of housing options available on website and in office. Housing list customers can review housing options and prospects through PHA website or discussions with staff. Contact details for homeless persons referrals to Local Authority.

Internal Customers

How	Who	What	When	Details
17) Board and Committee Meetings	Board	Formal meetings in person and/or online to consider business in relation to remits and standing orders.	Quarterly	Outline agendas set at start of year and at pre agenda discussions with Chair of each Committee.
18) Intranet	Staff and Board	Internal electronic bulletins.	Ongoing	Online bulletins with updated information across all business functions as appropriate.
19) E-Mails	Staff and Board	Digital communication.	Ongoing	Communications to Board and staff. General information provided to all through intranet as detailed above. E-mails more focused on targeted and time-specific information.
20) Policies and Procedures	Staff and Board	Policy review schedule and list of Policies and Procedures in place for all functions.	Ongoing	Policies/ strategies reviewed by Board in line with review schedule and outlined to all staff and training provided where relevant to role and required. Available on the intranet. Procedures to support policies/ strategies developed, monitored and reviewed by Managers, in consultation with Leadership Team.
21) Team Meetings	Staff	Monthly team meetings face-to-face with colleagues.	Monthly	In place for all teams and led by relevant Manager. Opportunity to update on areas, discuss operational activity plans and share ideas for good practice and service improvements and effective collegiate working across the business.
22) Task Groups	Staff	Task Groups to focus on specific cross functional activity.	Quarterly	Short-life Task Groups represented by relevant staff from appropriate areas of the business to focus on specific tasks, review priorities and processes, and recommend actions, timescales and measurable outcomes.

How	Who	What	When	Details
23) Breakfast Briefings	Staff	Breakfast briefings to allow functional staff group to update colleagues on key activity and changes.	Monthly	Programme of scheduled meetings and open to all staff members. Take place from 8.30am-9.00am. Focus on relevant topics and business priorities.
24) Board Appraisals	Board	One-to-one questionnaires and discussions to review performance and consider future support and training requirements.	Annually	Board member appraisals carried out annually, which incorporate skills audit and evaluation of performance of Board collectively in relation to Regulatory Standards. Also review of individual and collective continued effectiveness, recruitment and succession planning.
25) Staff Performance and Development Reviews	Staff	One-to-one review meeting with Line Manager to review performance and consider future support and development priorities against Individual Activity Plans.	Annually	Undertaken annually, with any agreed training and development incorporated into annual training plan. Review of continued professional development requirements and compliance.
26) 1-2-1 meetings	Staff	Monthly 1-2-1s face-to-face with Line Manager to review performance and priorities against Individual Activity Plans.	Monthly	Opportunity to update objectives and workplan, discuss operational/ strategic priorities, review performance/ targets and share ideas for good practice, service improvements and effective collegiate working across the business. Also opportunity to review wellbeing, restate priorities and input to updating of team's Service Activity Plan.
27) Pre Agenda Meetings/ Discussions	Leadership Team and Chairs	Liaison meetings, phone calls, etc between Leadership Team and Chairs.	Ad hoc	Discussions prior to Board/ Committee meetings to review priorities and agenda items. Also opportunity to update on relevant issues.

How	Who	What	When	Details
28) Performance Reviews	Board	Performance reviews submitted to Board detailing KPIs for all functions.	Quarterly	Provides overall position and trends in relation to activity and performance against this. Acknowledges areas of good performance and identifies areas where service improvement is required.

Stakeholders

How	Who	What	When	Details
29) E-Mail	Partners, Contractors, Consultants, Scottish Government and Local Authority	Group Corporate Plan and Strategic Themes/ Objectives. Business Plan Annual Accounts	Ongoing	Information shared with key stakeholders as appropriate and ensure alignment of roles and priorities.
30) Meetings	Partners, Contractors, Consultants, Scottish Government and Local Authority	Liaison and relationship meetings.	Ongoing	Ongoing meetings to consider strategic and operational priorities.