



Scrutiny Report – Salix Homes Customer Engagement Techniques

March 2021

1. Scope

Subject	Salix Homes customer engagement techniques
Commissioned by	Salix Homes Customer Committee
Panel	To be sourced from Salix Homes Scrutiny Pool (between 4 and 6 members)
Aims / objectives/ outcomes	<p>The purpose of this review is to:</p> <ul style="list-style-type: none"> • Understand Salix Homes’ approach to customer engagement • Understand the implications of the Housing White Paper – The Charter for Social Housing Residents • Review Salix Homes’ approach to customer engagement including: <ul style="list-style-type: none"> ○ Salix Homes’ current customer engagement framework ○ Salix Homes’ current customer forums ○ The role and function of community connectors ○ Salix Homes’ approach to customer surgeries
Key service area involvement	<ul style="list-style-type: none"> • Customer Engagement • Communities team
Links to corporate plan	<p>This scope supports the corporate plan: Our Business: Viable, efficient and well governed. Ensure a strong and influential customer voice through our new customer engagement arrangements.</p>
Timescale	See workplan
Resource commitments	Proposed cost: £1,500, excluding staff time.
Report Author	Anne-Marie Bancroft, Customer Engagement Manager

2. Methodology

2.1 Full training and support in relation to the anticipated changes arising from the Building Safety Bill and the White Paper; a Charter for Social Housing Residents.

2.2 Review of reports of current approaches and copies of relevant documentation in relation to:

- Salix Homes current approach to customer engagement, the current customer engagement framework and their approach to the promotion and recruitment of engaged customers (appendix 1)
- Salix Homes current approach to engaging customers for the procurement and delivery of large-scale improvement projects (appendix 2)
- Salix Homes current approach to engaging customers for the reporting of building safety concerns and the handling of fire and other compliance issues (appendix 3)
- Salix Homes current approach to engaging customers in the community and their relationship with community connectors (appendix 4)
- Salix Homes current approach to engaging customers in respect of the procurement and delivery of new build schemes (appendix 5)

2.3 Interviews with the following officers:

- Anne-Marie Bancroft, Customer Engagement Manager
- Lissa Burdis, Investment Manager
- Stewart Kerr, Compliance Manager
- A Neighbourhood Manager
- James Allen, Marketing and Communications Manager
- Terry McBride, Development Manager

2.4 Telephone interviews with a proportion of customers who are currently engaged in the following groups (appendix 6)

- Community Connectors
- High Rise Living Forum
- Leasehold Forum

2.5 Attendance at the Leasehold Forum

2.6 Focus Group with customers who have reported a drop in satisfaction in the annual customer survey of “views being taken into account by Salix Homes” (appendix 7)

3. Findings: Salix Homes current approach to customer engagement

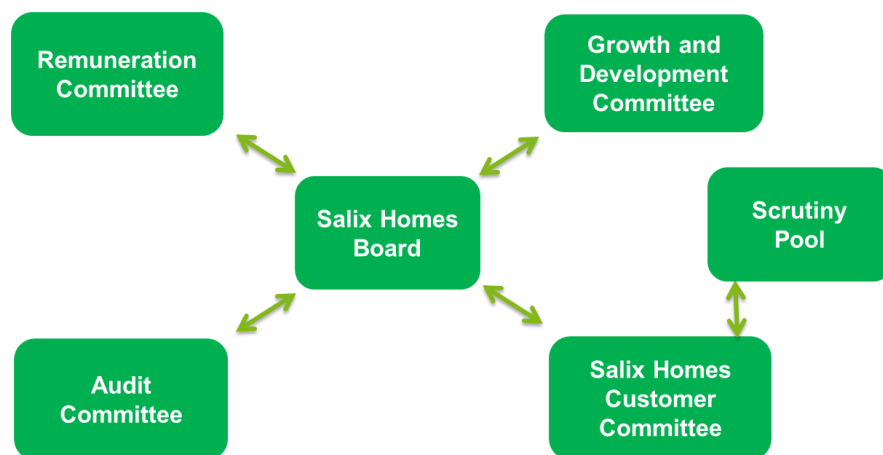
3.1 Salix Homes approach

Salix Homes started to refresh their approach to customer engagement in 2019 considering the anticipated changes arising from the Housing Green Paper and the Hackitt review of building safety. The approach included recruiting a Customer Committee, a committee of the board and a dedicated customer engagement manager. The intention of the project was to deliver outcome focussed, meaningful customer engagement. In the development of the customer committee, a focus has been put on training and supporting engaged customers to give them the skills and confidence to effectively hold Salix Homes to account.

3.2 Customer Committee

Salix Homes appointed a customer committee of 10 customers in January 2020, two customer board members also sit on the committee, of which one is the interim chair. The customer committee is a committee of the board and customers sitting on the committee are remunerated at the same level as Salix Homes Board members. Salix Homes Governance structure is outlined below.

Fig 1: Salix Homes Governance Structure



The recruitment campaign for customer committee members was successful and a diverse group of over 100 customers applied. The customer committee completed an 8-module training programme in customer governance, of which there was an optional level three qualification. Reports from committee members have been that the training programme has been essential for their role as a committee member. Training was delivered 50% in house by Salix Homes and 50% by the Housing Diversity Network.

The customer committee are a strategic function and have both monitored the delivery of services and shaped how services will be delivered in the future.

3.3 Scrutiny Pool

Customers who applied for places on the committee and remained engaged were offered positions in the scrutiny pool, predominantly to be involved in one off paid pieces of scrutiny. There are 77 customers in the scrutiny pool. In addition, the customer engagement manager approaches customers in the pool for additional engagement such as customer testing, involvement in national groups and to attend sessions held by TPAS.

3.4 Scrutiny Projects

Scrutiny projects are commissioned by the customer committee and delivered by a task and finish scrutiny panel created from the scrutiny pool. The customer committee will consider the information shared with them at meetings and the operating environment to decide the scope. Scrutiny projects are carried out in 8 weeks in line with the customer committee meeting schedule. This is the second piece of scrutiny completed since the appointment of the customer committee.

3.5 Strengths

- Effectively training customers to engage has proven beneficial for the engaged customers and Salix Homes.
- The recruitment campaign for customer committee resulted in a diverse group of applicants, most of which are now involved as committee members or members of the scrutiny pool.

3.6 Areas for improvement

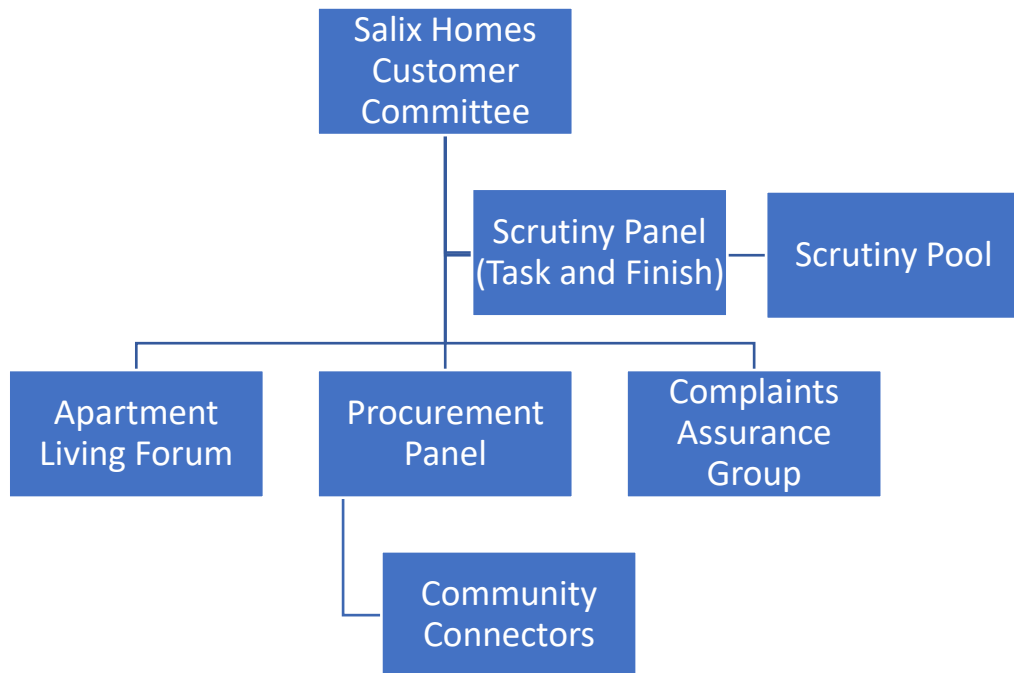
- Two-way communication between the customer committee and the remainder of the engaged customer base needs to be improved.
- There is a gap between the strategic functions of the customer committee and the scrutiny pool and the 'on the ground' functions of community connectors.

3.7 Recommendations

- Develop mechanisms for the customer committee to communicate effectively with the remainder of the customer engagement structure.
- Continuously review the diversity of their engaged customers to ensure that engaged customers represent the diversity of the customer base and that customer engagement functions are inclusive.
- Similar marketing methods to the recruitment of the customer committee should be considered for the recruitment of engaged customers.

Note: The structure proposed in this report can be found at fig 1

Fig 1: Proposed customer engagement structure



4. Findings: the implications of the social housing white paper – The charter for social housing residents

4.1 Overview

The social housing white paper, the charter for social housing residents, sets out standards that every social housing tenant in England will be entitled to expect from their landlord. The white paper is focussed on making sure social housing tenants:

- Have a voice and are listened to,
- Are safe,
- Live in good quality homes and neighbourhoods and,
- Have access to redress.

The white paper indicates a change in the way that social landlords listen to and act on the customer voice. The white paper outlines that customer engagement should be meaningful and that social housing providers will be required to evidence how they listen to and act on the customer voice.

The social housing white paper can be found at: [The charter for social housing residents: social housing white paper - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/672112/social_housing_white_paper.pdf)

4.2 Implications for Salix Homes

During the session with Sue Sutton, chief executive and Sian Grant, executive director of operations the following implications for Salix Homes emerged:

- Salix Homes have considered the changes proposed in the white paper when developing their operating model.
- Salix Homes have developed a Customer Charter; Our Promise to You, to evidence the delivery on the standards outlined in the white paper.
- Salix Homes have between 12 and 18 months to adapt to the changes proposed in the white paper.
- The biggest challenge that Salix Homes faces is culture change to embrace the customer voice and overcoming social housing stigma.

4.3 Strengths

- Salix Homes has considered the Social Housing White Paper and the customer voice in their Build Back Better plans and are in the process of adapting their operating model accordingly.
- Salix Homes acknowledge that there is more to be achieved.
- Salix Homes has prepared for the changes arising from white paper by recruiting the customer committee and a dedicated customer engagement manager.

4.4 Areas for improvement

- The routes for customers to have a say on the procurement and delivery of large-scale improvement programmes are limited and focussed on end user experience.

- The routes for customers to have a say about the handling of formal complaints is limited.
- The Salix Homes Customer Committee are currently considering complaints reports every quarter and customer complaints represent 0.3% of customer transactions.

4.5 Recommendations

In consideration of how best to achieve meaningful customer engagement as outlined in the social housing white paper the proposed groups in this section have been developed with a focus on their impact, contribution to a change in culture and overcoming social housing stigma.

- Develop a **Procurement Panel** the following scope:
 1. Work alongside Salix Homes for the procurement of contractors for large-scale improvement programmes.
 2. To test the delivery of large-scale improvement programmes.
 3. To oversee the quality of large-scale improvement programmes.
 4. To acknowledge the skills and knowledge of our customer base.
 5. Utilise a relationship with community connectors to test the delivery of large-scale improvement schemes.
 6. Link with local community connectors for their views for possible legacy projects and appropriate directions of social value outcomes.
 7. Oversee the delivery of social value outcomes and legacy projects.
- Develop a **complaints assurance group** with the following scope:
 1. Supporting culture change in relation to customer complaints.
 2. Reviewing complaints data to identify trends which can be escalated to the customer committee to inform possible scrutiny projects.
 3. Improving the approach to learning from complaints
 4. Reviewing anonymised complaints responses to monitor how Salix Homes listens to customers during the complaints process.
 5. Developing the approach to surveying customers who have used the complaints process.
 6. Benchmarking the complaints process against other social housing providers.
- Both Groups:
 - Will be **unpaid** but resourced – members will be provided with appropriate ICT kit and training (like the Customer Governance Training provided to the customer committee) will be provided by Salix Homes.
 - Will have a customer committee member sitting on them who will feedback the work of the group through updates at committee meetings.
- Salix Homes should consider ways to improve relationships with customers where the relationship has broken down. This includes taking accountability for things that may have gone wrong and make the limitations that Salix Homes face clear at the outset.

5. Findings: High-Rise Living Forum and Leasehold Forum

5.1 High Rise Living Forum

Following the Grenfell Tragedy in 2017 Salix Homes created the High-Rise Forum to communicate their approach to building safety. The group was refreshed in November 2019 and rebranded and renamed High-Rise Living Forum. The High-Rise Living Forum meet at least twice a year on a flexible basis. The High-Rise Living Forum has no chair. Four of the five scrutineers involved in this project have attended the forum and for this reason the decision was made not to attend the forum as part of the methodology for this project.

5.2 Leasehold Forum

Salix Homes have a leasehold forum which was established whilst Salix Homes operated as an ALMO (pre 2015) by the since dissolved, Audit Commission. The leasehold forum meets bi-monthly. The Leasehold Forum has no chair.

5.3 Strengths

- The High-Rise Living Forum is an appropriate channel for high-rise residents to raise concerns about their building and safety considering the white paper and heightened customer concerns post Grenfell.
- The experiences of customers living in apartments differ to customers living in houses and it is appropriate for a forum about this property type to be placed in the engagement structure.
- The High-Rise Living Forum is well placed to support Salix Homes through the anticipated changes arising from the white paper and the Building Safety Bill.
- Leasehold customers have a dedicated Leasehold Manager who they directly engage with.

5.4 Areas for improvement

- Often customers in both forums will raise their own individual concerns and not represent the wider customer voice.
- Planned improvements to Salix Homes listens to and acts on the customer voice should result in customers engaging to have a meaningful say rather than engaging to raise individual concerns.
- The wider leasehold customer voice is not being represented at the Leasehold Forum effectively.
- Customers attending the High-Rise Living Forum and the Leasehold Forum have parallel views, both groups main concerns are parking, communal cleaning and maintenance and issues with bins.
- Both forums do not have a chair.
- There is a lack of communication between both forums and the customer committee.

5.5 Recommendations

- Streamline the High-Rise Living Forum and the Leasehold Forum into a new apartment living forum to prepare for the anticipated changes arising from the white paper and the Building Safety Bill.
- Agree a set terms of reference with the new apartment living forum and a specific scope with a strong focus on building safety and apartment living.
- Recruit a customer committee member to chair the forum.
- Offer all the current customers engaged in the Leasehold Forum and the High-Rise Living Forum the option of joining the scrutiny pool.
- To ensure that leaseholder specific views are considered, creating groups on a task basis when required; by offering attendance to all leaseholders.
- To make better use of the apartment living forum to discuss social value, communicating Salix Homes services and surgeries.

6. Findings - The role and function of community connectors

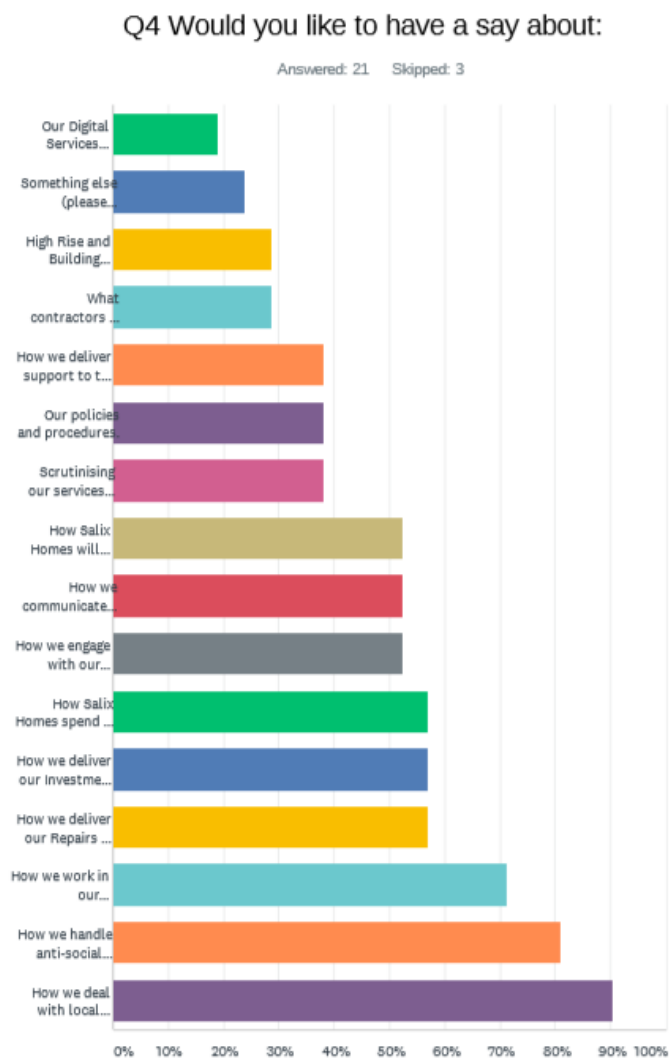
6.1 Overview

Salix Homes have over 80 community connectors on record, although a recent survey identified that 30 connectors are currently engaged and wish to continue in their role. Community connectors are 'go to people' and enable Salix Homes to understand customer priorities and 'on the ground' concerns of residents.

6.2 Community Connector review

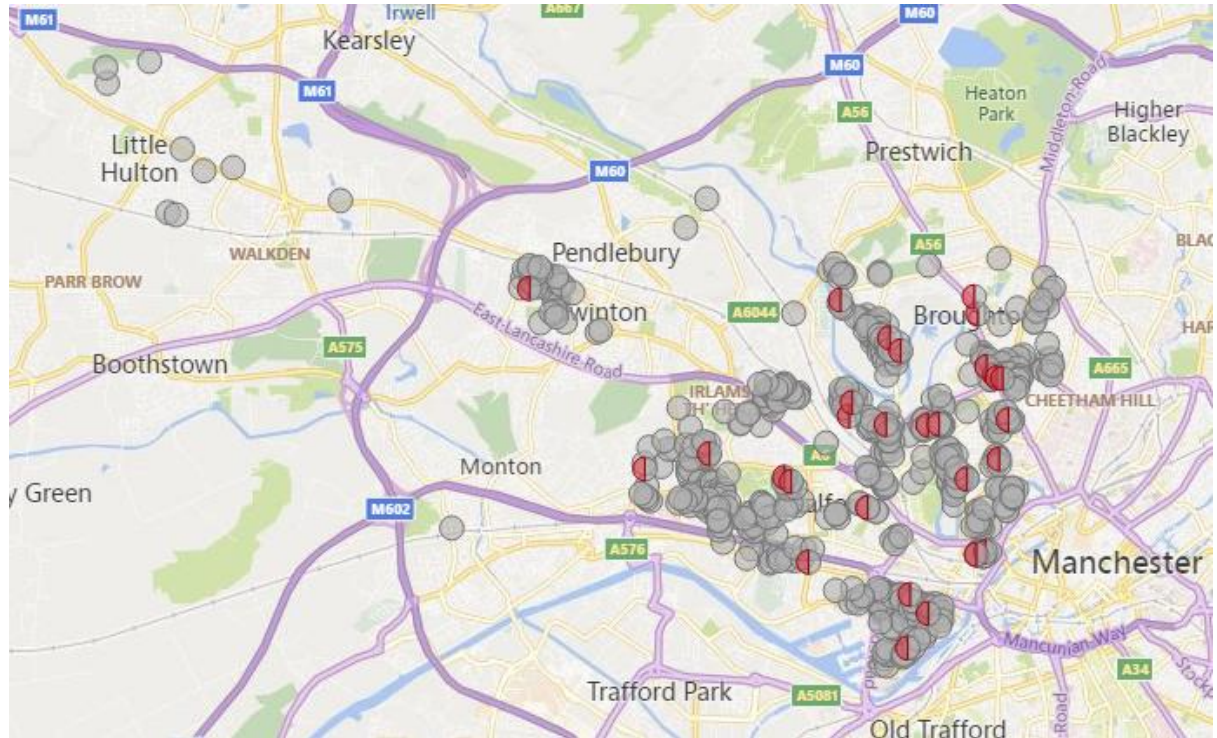
In a recent community connector review, the role of the connectors as outlined in their role description mirrored the interests of the engaged connectors. In addition, it mirrored the view of the role by the neighbourhood teams. Connectors who have completed the paper and online survey in relation to their role recorded their interests as outlined below:

Fig 2: How Community Connectors would like to have a say.



As part of this scrutiny project, the location of the 30 community connectors who remain engaged was mapped against Salix Homes stock.

Fig 3: Community connector location (red) against stock (grey)



6.3 Strengths

- Community connectors who remain engaged continue to have interest in being involved in the delivery of community activity and improving their local area, supporting the ambitions of the Housing White Paper.
- Community connectors are located in the majority of the areas where Salix Homes owns stock.
- Community connectors are well placed to understand the delivery of Salix Homes services ‘on the ground’

6.4 Areas for improvement

- Community connectors described that they do not have a working relationship with their neighbourhood officer.
- There is a disjoint between Salix Homes perception of community connectors and their involvement in comparison to community connectors perception; their role doesn’t appear to resonate at a ground level.
- Community connectors require regular contact and support from Salix Homes.

6.5 Recommendations

- Improve the relationship with the connectors who remain engaged, an expected level of communication should be established.
- Consider ways to better utilise the role of the community connectors as the impacts of the COVID-19 pandemic continue.
- Link community connectors to social value outcomes, legacy projects, and the usage of the springboard scheme.
- Approach community connectors to give honest feedback about large scale refurbishment schemes.
- Work with community connectors in relation to delivering the green agenda.
- Utilise the community connector function for mystery shopping.
- Resource connectors with devices, where possible.
- Community connectors should be active members of the community:
 - Salix Homes should establish who is a connector in a community; asking customers who the connector is in their community over asking customers if they would like to be a community connector.
 - Salix Homes should consider whether customers who run local Facebook groups are acting as community connectors.
- Rebrand the community connector role as follows:
 - Rename community connectors.
 - Provide information about what community connectors have achieved over a formal role description.

7. Findings: Salix Homes approach to customer surgeries

In 2016, Salix Homes set up a network of community hubs to increase visibility of neighbourhood officers. Salix Homes saw limited uptake of the hub service and impacts of the pandemic has significantly reduced uptake in the last 12 months.

7.3 Strengths

- A localised presence gives customers assurance that Salix Homes address local issues.
- The spaces used for customer surgeries offer opportunity.

7.4 Recommendations

- Salix Homes should consider offering drop-in sessions in flexible locations such as local libraries and community hubs, where required. Session location and times should be communicated to the customer base.
- Salix Homes should utilise mobile (bus/van/marquee) pop up sessions to address local issues.
- Salix Homes should utilise community hubs either for accommodation or community activity.

Appendix 1 – specific requests: relevant documentation Salix Homes current approach to customer engagement, the current customer engagement framework and their approach to the promotion and recruitment of engaged customers

- 1.1 Approach to providing an accessible service to customers, including non-English-speaking customers, customers with disability and digitally excluded customers.
- 1.2 What the current approach to Customer Engagement is
- 1.3 What issues the organisation has faced with the current approach
- 1.4 Any suggested improvements to be considered by the scrutiny panel

Appendix 2 - Salix Homes current approach to engaging customers for the procurement and delivery of large-scale improvement projects

- 6.1** Overview of the current approach to engaging customers
- 6.2** What issues the organisation has faced with the current approach
- 6.3** Full outline of the procurement and delivery process for large-scale improvement projects
- 6.4** Any suggested improvements to be considered by the scrutiny panel

Appendix 3: Salix Homes current approach to engaging customers for the reporting of building safety concerns and the handling of fire and other compliance issues

- 3.1 Current approach to engaging customers in relation to the handling of and reporting of building safety concerns and other compliance issues.
- 3.2 What issues the organisation has faced with the current approach
- 3.3 Any suggested improvements to be considered by the scrutiny panel

Appendix 4 - Salix Homes current approach to engaging customers in the community and their relationship with community connectors

- 4.1 Current approach to the role and function of community connectors.
- 4.2 Current approach to engaging customers in relation to community issues
- 4.3 Current approach to customer surgeries and high-rise engagement events
- 4.4 What issues the organisation has faced with the current approach
- 4.5 Any suggested improvements to be considered by the scrutiny panel

Appendix 5: Salix Homes current approach to engaging customers in respect of the procurement and delivery of new build schemes

- 5.1 Current approach to engaging customers in the procurement of new build contractors
- 5.2 Current approach to engaging residents living in areas of development
- 5.3 What issues the organisation has faced with the current approach
- 5.4 Any suggested improvements to be considered by the scrutiny panel

Appendix 6: Qualitative telephone interviews with a proportion of customers who are currently engaged in the following groups:

- **Community Connectors**
- **High Rise Living Forum**
- **Leasehold Forum**

6.1 Line of Questioning:

- What do you think the benefits are of being involved?
- What are you happy about?
- What are you unhappy about?
- For those raising complaints, ask if they know of the complaint's procedure.

Appendix 7: Focus Group with customers who have reported a drop in satisfaction in the annual customer survey of views being taken into account by Salix Homes

7.1 Line of questioning/discussion:

- What views have you expressed to Salix and how?
- How do you think Salix can improve how they take customer views into account?
- For those raising complaints, if they are aware of and their experience of the complaints process.