

Success,  
Satisfaction  
and Scrutiny:  
the Resident  
Engagement  
Toolkit

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## Introduction

At AmicusHorizon we know how critical resident governance and involvement is. It's helped us transform from a housing association placed into regulatory supervision in 2007 to one which now boasts sector-leading performance. Residents have helped shape our strategy. They've shared their insights to improve customer service. They've keenly scrutinised our performance. And they've helped us cut costs by directing resources to where they matter most. We're convinced involving residents makes brilliant business sense.

### Success, Satisfaction & Scrutiny

Success, Satisfaction & Scrutiny, the report we launched in March 2015, provides evidence to support our convictions. Commissioned by the Department for Communities and Local Government (DCLG) and written by the University of Westminster, it offers a compelling case for providers to involve their residents more meaningfully.

Its first finding is arguably the most compelling; the financial benefits of involving residents far outweigh the costs. Looking at just two case studies, the researchers identified annual efficiency savings of around £2.7 million. They stem in large part from residents' contributions and are significantly higher than the sums we spend annually on involvement.

The researchers also uncovered a link between resident satisfaction and the opportunities we provide. Examining six years of survey data they identified a strong and intensifying relationship between residents' overall satisfaction and feelings their views are listened to and acted upon.

**The message is clear; involve your residents in your business and you'll increase satisfaction AND drive down costs.**

## Success, Satisfaction and Scrutiny:

the Resident Engagement Toolkit

Paul Hackett, AmicusHorizon's Chief Executive, explains more below:



### A toolkit for practitioners

With the case for engaging residents crystallising it's important to share thoughts on what works best. That's the reason for this toolkit. Looking back at our experience, we've identified some practical steps landlords can take to engage their residents more effectively. While our report dealt with the 'why' of resident involvement, this toolkit covers the what, who and how.

### Come and find out more!

Our hope is this toolkit offers some inspiration and sparks curiosity about our approach. So to support its launch we're holding an 'open day' on Friday 27 November 2015. It'll be a great opportunity for practitioners to learn more about what we do, network with likeminded staff and discuss approaches to resident involvement. If you'd like to know more, please contact Charles Glover-Short, AmicusHorizon's Senior Research Analyst, on 0208 726 8656 or [charles.glover-short@amicushorizon.org.uk](mailto:charles.glover-short@amicushorizon.org.uk).

## Practical steps

Below are the practical steps we believe will help you harness the potential of resident involvement. Whatever your motivation, whether it's boosting satisfaction, securing cost savings, or enhancing accountability, they'll help you achieve your goals. In common with other toolkits, we've identified a number of themes into which the steps can be grouped. These are:

### Laying the foundations

- Agree your reasons for involving residents
- Get buy-in from board, senior staff and residents
- Make it everyone's job
- Build trust.

### Designing the offer

- Ask residents how they wish to be involved
- Provide a range of opportunities
- Involve residents in procurement and complaints handling
- Allocate residents positions on your board
- Help residents to share their thoughts online.

### Recruiting and retaining residents

- Demonstrate residents' impact
- Be proactive about recruitment
- Aim for a representative sample of views
- Offer financial incentives
- Introduce some fresh perspectives
- Capture lessons when residents leave.

### Maximising potential

- Offer training
- Make scrutiny genuinely resident-led
- Gather information from various sources
- Set clear guidelines for meetings.

Dotted around the toolkit are eight case studies giving brief accounts of how we've taken the steps at AmicusHorizon.

# Laying the foundations

1

## Agree your reasons for involving residents

What do you want to get out of resident involvement? What value will it add over a system where priorities and performance management are determined largely by staff? It's important to ask these questions right at the very start...and agree upon the answers.

Start by considering how involvement fits with your cooperate objectives. 'Success, Satisfaction and Scrutiny' identifies many potential links including:

- Increased resident satisfaction
- Financial savings
- Fewer and more quickly resolved complaints
- Improved relationships
- Compliance with the HCA's regulatory framework.

Historically, providers haven't been especially good at this. The likes of the [Audit Commission](#) and [Housemark](#) have even criticised some for seeing involvement as an end in itself. But the evidence we've uncovered should mean providers can identify these links more readily.

### Case study one:

## Becoming an 'outwards-facing' organisation

For us involving residents was originally about becoming a more customer-focused organisation. In 2007 we were placed into [regulatory supervision](#). Focusing on integrating and standardising seven subsidiary housing associations meant we were neglecting residents' opinions.

Our new board and Strategic Executive Team appointed in 2009 recognised we needed to be an outwards rather than inwards facing organisation. And the key to achieving this in their eyes was to place residents at the heart of everything we do.

Our Resident Governance Structure (see page 24) was in place shortly afterwards and remains the centrepiece of our involvement offer.

Now resident involvement underpins our strategy to be the best performing large landlord in the UK (see page 8). Residents are integral to priority setting and identifying performance improvements. Involving residents is also the way we match production to consumption. It helps us allocate resources efficiently and make savings without compromising satisfaction.

## Get buy-in from board, senior staff and residents

The foundation for successful involvement is an organisational culture which welcomes resident insight and challenge. That's why getting buy-in from board and senior staff is absolutely crucial - they're the ones capable of enacting culture change. Strategies for convincing them should focus on the links to corporate goals identified above, recognising that the 'carrot' of financial savings and satisfaction rather than the 'stick' of regulatory compliance may be more compelling.

And don't forget the residents. Involve them in discussions from the very beginning. Why? One, because it'll set a precedent to show their contributions will be valued. And two, it'll help hugely in designing your resident involvement 'offer' (see page 10).

## Make it everyone's job

If involvement is to be genuinely effective it needs to be embedded in your culture. It should be something all staff are responsible for rather than "the prerogative of specific employees or a particular section of an organisation" ([Tenant Services Authority, 2010](#)). Senior staff must:

- i. Clarify the reasons for engaging residents more and the realities of the new way of working

Staff may feel their professional expertise is being undermined if increased weight is attached to residents' perspectives. Senior staff should communicate the virtues of a more balanced approach. Resident input will help staff and board make better-informed decisions, which in turn will help achieve corporate goals...

## Case study two: Working as 'One Team'

At AmicusHorizon involving residents is all about delivering excellence and efficiency. It means we can tailor services to residents' preferences. We neither over- nor under-serve our customers.

So while residents may lack directly relevant professional expertise, they have a huge amount to offer. To fulfil this potential we recognised it was important to create a sense of parity and equal-footing between residents, staff and board.

We've done this by introducing the concept of 'One Team'. It's to show board, staff and residents are all working together towards the same goals. We also offer meaningful opportunities for residents to influence our strategy.

Practical steps we've taken include:

- Allocating board members to resident Area Panels to 'flatten' our Resident Governance Structure (see page 24), providing a useful reality-check for board members and helping panels escalate issues when needed
- Requiring board, staff and residents to undertake joint training
- Introducing a single code of conduct
- Presenting the Strategic Executive Team's roadshow to all parties to explain the shared aim of being the best performing large landlord in the UK
- Having four resident members on our board and involving residents in board recruitment
- Including residents on interview panels for all customer-facing and senior staff roles
- Organising joint away days with our Residents' Council and board.



### ii. Incentivise staff

Senior staff should consider offering financial rewards to staff if they hit all corporate goals. If staff can see;

1. a direct personal benefit to their organisation's success; and
2. engaging residents boosts the chances they'll succeed;

they'll be far more likely to buy-in to involvement. Organisation-wide incentives of this type help prevent involvement being seen as the preserve of a specialist resident involvement or governance team. They also underline the importance of involvement to the business.

### Build trust

Trust is essential. It provides the confidence all parties – residents, staff and board – are working towards the same goals. It also means they'll work harder, show greater loyalty, contribute better ideas and work through disagreements.

Our top tips for building and maintaining trust are:

- Act upon resident feedback quickly and communicate the impact
- Respond quickly to any ad-hoc requests.
- Get residents involved in high profile activities including procurement, staff interviews and complaints panels
- Let residents take leadership roles in scrutiny projects and determine which parts of the business are scrutinised and when
- Consult residents in the early stages of strategy and policy development and grant them opportunities to revise draft versions
- Allocate spaces on your board to residents; transparency then extends right to the top of the organisation with no scope for perceptions of a 'hidden agenda'
- Work with residents to design easy-to-use performance reports.

## Case study three: AmicusHorizon's five Gold Medals

We set a target in our 2013/16 strategic plan to be the best performing large landlord in the UK by March 2016. The five 'Gold Medals' set in conjunction with residents to judge whether this has been achieved are:

- Resident satisfaction
- Repair satisfaction
- Satisfaction with handling antisocial behaviour
- Satisfaction with handling complaints
- Average re-let times.

Four of the five are satisfaction measures – residents judge our success - so staff have a very clear motivation to deliver services matching residents' preferences. As an additional incentive, all staff are eligible for a performance-related bonus should all of the respective targets be achieved.

Since 2012 we've also got every single member of staff to write a sentence in their annual objectives to show how these will benefit residents. This completes the 'golden thread' of the strategic plan ensuring the work of every member of staff, even those in the back-office, can be linked directly to the ambition of delivering brilliant customer service.





## Key Recommendations

- ✓ Establish a clear case for involving residents linked to your corporate objectives
- ✓ Get support from board and your Chief Executive to instigate culture change and embed involvement
- ✓ Additionally link involvement to team and individual objectives so it becomes a consideration across your business
- ✓ Communicate your reasons for involving residents and how their input will complement the knowledge of staff and board
- ✓ Establish some key terminology (e.g. 'One Team') to help standardise communications and create a shared understanding of concepts
- ✓ Promote the role of residents by offering meaningful opportunities and letting them identify routes forward
- ✓ Act upon resident feedback and communicate the impact.

## Designing the offer

2

### Ask residents how they wish to be involved

It's important you design your offer around your residents. You need to find out:

- Why they want to get involved. Are they motivated by 'push' (e.g. a negative experience of service delivery) or 'pull' (e.g. the chance to join others in making a difference) factors?
- What aspects of the business they want to get involved in. Are repairs and maintenance the overriding priorities? What about financial and digital inclusion? Do residents' priorities match your own?
- How they wish to be involved. Is it through formal meetings or from the comfort of their own home?

Surveying residents is a good starting point, but you need to be careful about how you phrase your questions. Simply asking residents whether they'd like greater influence or want more opportunities for involvement can be ineffective. Why? Because they're leading questions and some residents say 'yes' out of a sense of obligation. More effective is to get residents to think about what they wish to achieve and how. For example, creating a more effective complaints process by mystery shopping.

What surveying will probably reaffirm is your residents are a diverse bunch. Their motivations, preferred means of engaging and time commitments will most likely vary by factors such as location and generation. So it's important not to apply a one-size fits all approach. Customer segmentation can help in establishing some of the expected behaviours and preferences of different groups.

### Provide a range of opportunities

Once you've established why, where and how your residents wish to be involved, the next stage is to design an 'offer' reflecting these factors.

This approach will help ensure the broadest possible selection of views is being heard, which in turn increases the likelihood they are representative of the broader resident population. Click on the links below for:

Details on our Resident Governance Structure (see page 24)

Details on our informal opportunities for involvement (see page 26)

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*Your resident involvement 'offer' should provide a range of opportunities catering for the interests and time available to your residents.*

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A longstanding recommendation (e.g. [Audit Commission, 2004](#)) is to present the different opportunities in the form of a menu of options. Residents can then self-serve, picking and choosing the events and means of engagement which suit them. Creating an events calendar also helps, especially in preventing clashes and encouraging attendance at more informal events.

## Involve residents in procurement and complaints handling

Residents are acutely aware of the need to deliver value for money. Given the sums involved, getting them involved in procurement is arguably the most effective way of harnessing their skills.

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*Residents' impact on procurement accounted for the bulk of the £2.7 million annual efficiency savings we identified in Success, Satisfaction & Scrutiny.*

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Our recommendation is not just to look at the actual selection of contractors, but to involve residents in the whole 'life cycle' of a service:

- Involve residents in the design of contract specifications
- Reserve places for residents in shortlisting and selecting contractors
- Help panels make evidence-based decisions by supplying data collected through surveys, customer contact records, mystery shopping and post-inspections
- Survey residents on the performance of existing contracts and the specification of new ones
- Appoint resident monitors to carry out inspections of repairs and home improvements and feedback their findings
- Get mystery shoppers to assess the customer service delivered by contractors
- Regularly involve residents in reviews of contractors' performance and expenditure.

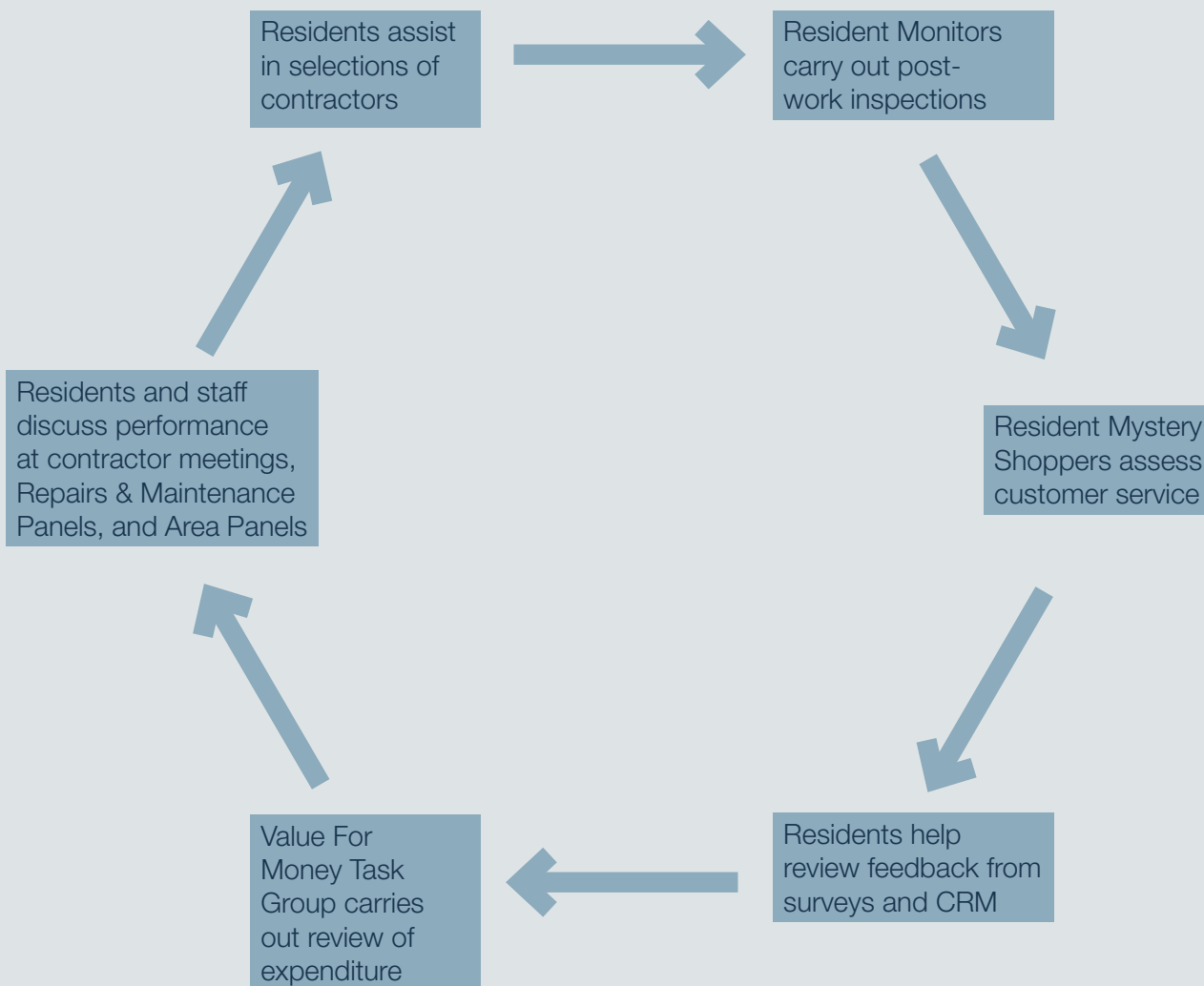


## Case study four: AmicusHorizon's feedback loop

Residents' involvement in shaping our services is such that we have a hugely valuable 'feedback loop'. Residents help us specify contracts, select contractors, and test services directly through post-inspections and mystery shopping.

That's in addition to the wealth of insights we gain through completing roughly 11,000 telephone satisfaction surveys each year and analysing thousands of customer contact records. Having an internal survey team helps in identifying and acting upon resident priorities swiftly.

### Feedback loop for repairs and maintenance service



Complaint handling is another activity which can be improved significantly through resident engagement. While the savings are significant, roughly £180,000 annually in our case, another hugely positive effect is improving satisfaction.

Resident involvement in complaint handling helps prevent complaints escalating to higher and more costly stages. For us, it's had the additional benefit of proving an effective way of recruiting involved residents and making scrutiny more powerful. In our experience the following are effective:

- Set up a complaints task group comprising residents and staff with overall responsibility for complaints strategy
- Involve residents in the design and review of complaints policies
- Let residents manage higher-level complaints. Our formally involved residents chair Stage Three complaint panels, visiting the complainant in their home together with members of staff to find an appropriate solution. They also help prevent complaints escalating beyond Stage Two
- Survey residents on their satisfaction with complaint handling
- Let residents identify 'lessons learned' from the handling of past complaints and include them in regular papers to senior staff
- Apply a cost to each stage of your complaints process. Do so cumulatively so a Stage Four additionally comprises the costs associated with Stages One, Two and Three. That creates a clear financial incentive not only to reduce the number of complaints, but also to resolve them more quickly.



## Case study five: Costing complaints at AmicusHorizon

In Success, Satisfaction & Scrutiny we estimated we were saving about £180,000 annually as a result of collaborating with residents to shape our approach to complaint handling. Here's how we worked out the figure.

- 1) We worked out a baseline. Residents first got actively involved in shaping our complaints process in late 2009 through our Complaints Task Group. The impact of their work was largely felt from 2010 onwards so 2009/10 seemed the most appropriate year against which to compare.
- 2) We selected a year to compare against. 2013/14 was the obvious choice as, at the time of writing the report, it was the most recent complete year for which data was available.
- 3) We analysed complaints between 2009/10 and 2013/14, categorising them by the highest stage they'd reached (see Table A).

**Table A: Formal Complaints**

Year	Highest Stage Reached				Grand Total
	1	2	3	4	
2009/10	970	183	21	12	1186
2010/11	469	69	10	1	549
2011/12	218	32	11	4	265
2012/13	177	33	4	3	217
2013/14	173	30	9	4	216

- 4) Next we estimated the costs associated with each stage of our complaints process. They're shown in the table below.

Stage	Costs	What's included in the cost?
1	Estimated cost: £140 Cumulative cost: £140 (Stage 1)	<p>Customer Experience Officer time:</p> <ul style="list-style-type: none"> <li>● Logging case on Customer Relationship Management (CRM) software</li> <li>● Acknowledging complaint in writing</li> <li>● Initial discussion with resident</li> <li>● Initial discussion with Lead Officer</li> <li>● Case conference with Lead Officer</li> <li>● Completing follow-up actions</li> </ul> <p>Lead Officer time:</p> <ul style="list-style-type: none"> <li>● Initial discussion</li> <li>● Attending case conference</li> <li>● Writing response</li> <li>● Speaking to resident</li> </ul>

Stage	Costs	What's included in the cost?
2	Estimated cost: £200 Cumulative cost: £340 (Stage 1 + 2)	A repeat of the steps in Stage 1, though involving more senior staff (e.g. in case conferences), additional time commitments and a visit to the complainant's home.
3	Estimated cost: £500 Cumulative cost: £840 (Stage 1 + 2 + 3)	<p>Customer Experience Officer time:</p> <ul style="list-style-type: none"> <li>● Acknowledging complaint progression and explaining what Stage 3 will involve</li> <li>● Senior level case conference</li> <li>● Organising customer-based training for complaint panel members - residents on our Resident Governance Structure chair our Stage 3 complaint panels</li> <li>● Pre-meeting ahead of complaint panel</li> <li>● Preparing case pack</li> <li>● Home visit (complaint panel)</li> <li>● Completing follow-up actions</li> <li>● Producing minutes</li> <li>● Monitoring actions</li> <li>● Explaining Housing Ombudsman Service</li> </ul> <p>Lead Officer time (responsibilities are shared between the Stage 2 lead and a Director so two members of staff are leading the complaint at this stage)</p> <ul style="list-style-type: none"> <li>● Reading papers</li> <li>● Preparing for panel review</li> <li>● Attending panel</li> </ul>
4	Estimated cost: £75 Cumulative cost: £915 (Stage 1 + 2 + 3 + 4)	<p>At this point our complaint resolution procedure has been completed, but there are a few remaining actions:</p> <ul style="list-style-type: none"> <li>● Sending case pack to the Housing Ombudsman Service</li> <li>● Possible case conference (involving Directors)</li> </ul>

5) We multiplied the estimated costs by the figures in Table A to get the following results:

**Table B: Costs**

Year	Highest Stage Reached				Grand Total	Savings against 2009/10
	1	2	3	4		
2009/10	£135,800	£62,220	£17,640	£10,980	£226,640	£0
2010/11	£65,660	£23,460	£8,400	£915	£98,435	-£128,205
2011/12	£30,520	£10,880	£9,240	£3,660	£54,300	-£172,340
2012/13	£24,780	£11,220	£3,360	£2,745	£42,105	-£184,535
2013/14	£24,220	£10,200	£7,560	£3,660	£45,640	-£181,000

6) Lastly, we subtracted the costs for 2009/10 from those for 2013/14 to produce the annual efficiency saving of £181,000.



## Allocate residents positions on your board

Registered providers have a duty to “regularly assess whether boards...have the right competencies, experience, and technical knowledge appropriate to the size, scale and risk profile of the organisation” ([HCA, 2015](#)). The crucial thing is an appropriate mix. Too few residents means neglecting the views of the key stakeholder, denying them an opportunity to influence governance and strategic decisions. Too many means a lack of specialist knowledge, the potential attention is diverted disproportionately to service delivery and the neglect of other stakeholders including future generations of residents. The result of both extremes might be reduced investor and lender confidence.

Our approach has been to reserve four out of twelve board places for residents. For us, this number, combined with the strong links between our board and Residents’ Council (see page 24), provides appropriate opportunities for resident influence in strategy and governance.

## Help residents share their thoughts online

Giving residents the opportunity to get involved via their smartphone, tablet, desktop, or TV is a great way to broaden your offer and deliver value for money. It means residents can:

- have an influence from the comfort of their own home
- participate at a time that suits them
- pick and choose how they wish to be involved.

Providing online channels for engagement can also help engage younger generations of residents, many of whom would rather participate remotely than come to meetings.

## Case study six: AmicusHorizon’s online opportunities for involvement

Amongst the steps we’ve taken are:

- Offering all residents on our Resident Governance Structure a loan of IT equipment to help perform their role
- Creating an online portal called ‘[My Account](#)’ (developed with residents through customer journey mapping) where residents will be able to access information about involvement opportunities and comment on services (including mystery shopping)
- Introducing new [Resident Involvement](#) pages on our website with our training offer and [routes to involvement brochure](#)
- Introducing [regional Facebook pages](#)
- Introducing a [Digital Champions programme](#) where residents are trained to help other residents use the internet.

And in the pipeline is:

- An AmicusHorizon mobile app to make better use of mobile technology in recording resident attendances, referrals and queries while we’re out and about.



## Key Recommendations

- ✓ Provide a range of involvement options reflecting the range of interests, preferences and time available to your residents
- ✓ Present them as a clear menu of options
- ✓ Involve residents in procurement and complaints handling
- ✓ Provide suitable opportunities for resident membership on board recognising there are pitfalls to over- and under-representation
- ✓ Offer online channels to increase overall participation and cater for the expectations of younger generations of residents.

# Recruiting and retaining residents



## Demonstrate residents' impact

Residents are much more willing to get involved if they can see the potential impact of their work. Our report '[Success, Satisfaction and Scrutiny](#)' is a good example of demonstrating impact, albeit one more detailed and resource-intensive than most providers may be able to commit to. Other smaller-scale steps you can take to demonstrate impact include:

- Periodically publishing the outcomes of resident involvement. This might be by dedicating pages of your [newsletter](#), [annual review](#) and [website](#) to the topic. Or by producing a dedicated resident involvement 'statement'. We're working with [Tenants Leading Change](#) to produce a common framework for providers to collate and publicise the costs and benefits of involving their residents
- Publishing performance reports tracking progress against residents' priorities and tracing their interventions to any improvements
- Highlighting successes in staff communications (e.g. newsletters and emails from senior staff) - staff's enthusiasm and awareness of outcomes is a big influence
- Seeking accreditation for your efforts and [publicising any award wins](#).

Of course, it's important to also focus on the personal benefits involvement can bring. As part of our [marketing](#) we've focused on feelings of making a difference, social interaction, and skills to be learnt through our training programme.

## Be proactive about recruitment

Recruitment should be a continuous rather than reactive process. When panel or task group vacancies arise there should be a suitably skilled resident ready to step in. Our top tips for proactive recruitment are:

- Establish a 'talent bank' to provide the involved residents of the future and make recruitment to it an objective for your resident involvement team
- Use local events as 'talent spotting' opportunities
- Use task groups, forums and panels as nurturing grounds for new talent
- Broaden the scouting process by making all frontline staff aware of the opportunities on offer. That way even seemingly the least likely interactions with residents can prove fruitful recruiting grounds; one of our resident board members was initially identified when challenging our decisions as a Stage 3 complainant
- Ensure all vacancies are well advertised and the benefits of membership clearly communicated
- Design precise person specifications / role profiles. The focus should be on attitude rather than aptitude; training can plug gaps in knowledge or skills
- Hold 'taster days' to help residents understand what involvement is about and the different options available
- Provide opportunities to observe resident meetings. We allocate three additional places lasting up to a year and without voting rights to each of our eight Area Panels to act as a training opportunity for residents who can then stand for full membership when a vacancy arises.

## Aim for a representative sample of views

Formal engagement structures can offer a wealth of insights, but they can also be ineffective in attracting traditionally hard-to-reach groups. Much of it is down to an emphasis on meetings. Groups including single parents, younger residents or those with irregular working hours may be underrepresented, undermining your ability to tailor services to residents' needs. To safeguard against this we suggest:

- Providing a range of opportunities. Our Resident Governance Structure is just one element of an offer which also comprises surveys and other 'armchair' forms of engagement
- Making engagement an objective of all community events including fun days, roadshows and estate action days
- Setting targets. Our aim is for the demographic profile of informally involved residents (i.e. all those apart from the ones on our Resident Governance Structure) to fall within five percent of that of our resident population. That's factoring in diversity characteristics including age, gender and ethnicity
- Identifying and plugging gaps. We've set up dedicated informal groups (e.g. a youth forum) and targeted events at groups we've found to be underrepresented
- Appointing rather than electing members. Recruiting from an already narrow demographic profile perpetuates a lack of diversity, whereas appointment can allow areas of deficit to be addressed
- Reimbursing reasonable travel costs or providing transport for vulnerable residents and when meetings finish after dark
- Providing refreshments for evening meetings
- Covering carer and childcare costs.

## Offer financial incentives

There are pros and cons to offering financial incentives. On the one hand they can encourage some residents to participate who might not otherwise do so; a persuasive argument where engaging traditionally hard-to-reach groups is a common aim. On the other hand, as the [National Tenants Organisations have pointed out](#), paying residents doesn't sit comfortably with the fact they are volunteering their time.

Our suggestion is to use financial incentives sparingly. Besides paying board members, we offer shopping vouchers to help recruitment to some consultations and to reward mystery shopping. As above, it's with the aim of ensuring a broad range of opinions is being taken into account.

### Case study seven:

## AmicusHorizon's plans for a points-based rewards system

In April 2016 we'll introduce a new Resident Governance Rewards Policy. It'll reward governance members with points for participating in different activities (e.g. helping to recruit staff and delivering training), and for making suggestions which change the way we work. The aim is to make the incentives contribution- rather than attendance-based. Residents will be able to exchange points for external training, which doesn't necessarily need to be housing-related and can be with any training provider.

## Introduce some fresh perspectives

Longstanding involved residents are typically highly trained, engaged, experienced, and knowledgeable. With a ‘foot in both camps’ many will also be tremendous advocates of your work. You need to weigh these qualities up, though, against the need to hear fresh perspectives and provide opportunities for others. Maximum terms can help. We feel we’ve struck an appropriate balance by introducing maximum terms of:

- nine years for Area Panels
- four years for chairing roles across our Resident Governance Structure.

In applying such limits avoid forcing involved residents to leave en masse. Some continuity in membership means experienced residents can help guide, train and mentor new recruits before they leave. Our nine year rule applies to all new Area Panel members. We’ve granted members elected prior to August 2015 an extension of three years (taking their maximum terms to 12 years) to allow for a robust succession plan to be put in place.

## Capture lessons when residents leave

There are valuable lessons to be learnt each time a resident decides to no longer be involved. Exit interviews can help capture personal reasons for dissatisfaction or any broader trends influencing the success of engagement. Even if a departure is down to reaching a maximum term, it’s still worth taking on board residents’ feedback. Their prolonged participation will mean they’ve valuable insights into what works and what doesn’t.



## Key Recommendations

- ✓ Demonstrate engagement is valued, meaningful and has tangible outcomes both for yourselves and residents
- ✓ Establish a ‘talent bank’ of involved residents to help with succession planning
- ✓ Make recruiting residents the responsibility not only of resident involvement staff, but of all their customer-facing colleagues
- ✓ Offer ‘taster’ opportunities for curious residents to see what involvement is all about
- ✓ Monitor the diversity characteristics of involved residents to ensure they’re representative of your broader resident population
- ✓ Encourage underrepresented groups to participate by creating dedicated forums or targeting events
- ✓ Tackle some of the practical barriers to attending meetings such as travel and childcare costs
- ✓ Use financial incentives sparingly and particularly incentivise contributions which change the way you work
- ✓ Introduce maximum terms
- ✓ Capture lessons through exit interviews when residents leave.

## Maximising potential

# 4

### Offer training

The more responsibility residents have, the more important having the right skill set becomes. For residents, training also acts as an effective hook for involvement – the chance to combine influence over their landlord with opportunities for personal development. So it's important to combine training specific to your organisation with courses offering transferable skills.

Our top tips for training are:

- **Offer bespoke packages for each element of your offer** (e.g. one for board members, one for mystery shoppers and so on). Consider offering an 'essential' package covering fundamental skills alongside an 'advised' package for residents wishing to go beyond the basic requirements
- **Have staff and residents attend the same training sessions.** Some training is relevant to both staff and residents (e.g. equality and diversity and subject-based masterclasses). Having them attend the same sessions is an opportunity to reinforce the 'One Team' message
- **Review what's on offer elsewhere.** The National Communities Resource Centre at Trafford Hall offers a '[Tenant Futures](#)' training package, which might be of interest for those looking to offer residents training externally. It covers positive local action to tackle problems, the development of resident groups and the management of social housing. [Tenant Central](#) offers free e-learning to residents, who can achieve an Open Award. And residents looking for a further challenge can study for a CIH Level Three Award in Resident Scrutiny.
- **Get more experienced residents to deliver training alongside staff.** Peer-to-peer learning can be especially effective and for those delivering the training it offers a further development opportunity. Our residents co-deliver training on service standards, chairing meetings and basic scrutiny skills. The opportunity is only available to residents scoring highly on our STAR competencies (Solution-focused, Team spirited, Ambitious to succeed and Responsive & resourceful)
- **Work with other landlords to deliver shared 'training hubs'.** Working with others can help share best practice and achieve economies of scale. It sometimes helps to hear from fresh faces as well
- **Annually assess the impact of training.** How many residents have attended courses? How many residents have achieved qualifications? Are residents putting their newly acquired skills to use? Surveying residents can help to ascertain the impact
- **Support residents through mentoring and one-to-one coaching.** This is especially important for roles with greater responsibility such as chairs of task groups or members of strategic panels. Personal development reviews can help identify further training and support needs. Our board 'Links' – each Area Panel has a designated board member – provide an additional resource for coaching and mentoring.



## Make scrutiny genuinely resident-led

We recommend the following to greatly improve the effectiveness of scrutiny:

- 1. Let residents decide which parts of the business to scrutinise and when.** Resident-led scrutiny lets residents address their own priorities (rather than these being dictated by staff or board) and keeps all services across the business 'on their toes'. Engaging residents in complaints monitoring helps; exposure to complaints trends and performance means residents can trigger reviews into the most pressing concerns of the wider resident body
- 2. Let residents capture their own evidence.** Residents should be able to obtain their own evidence in addition to that supplied by the landlord. It helps improve transparency and the power of scrutiny. Our Residents' Council and Area Panels can commission resident monitors and mystery shoppers to gather evidence on their behalf
- 3. Allow residents a say in determining the scrutiny budget.** That's so they have an influence in the scope and resources dedicated to scrutiny as well as its topics.
- 4. Let residents co-evaluate their success.** We produce annual effectiveness reports for all parts of our governance structure. Residents are involved in drafting the reports and monitoring progress against the resulting action lists.

## Gather information from various sources

Surveys, consultations and records of customer contact produce a huge amount of data on residents' preferences, but its potential could go unharnessed without a coordinated approach. The need will only increase with the increasing ubiquity of 'Big Data' and the 'Internet of Things'.

One strategy we've adopted is to provide information collected through informal means (surveys, mystery shopping etc...) to our formal groups to review. We'd recommend it for three reasons.

1. It means decisions are increasingly evidence-based, reducing the bias that might arise if involved residents were to draw solely upon their own experiences
2. It acts as a form of cross-checking, helping reality-check the trends you've identified
3. It ensures there are links between the different elements of your involvement offer.

### Case study eight: Providing the right amount of information

Providing the right amount of easily understandable, relevant and timely information is essential in enabling evidence-based decision making at meetings. We recently reviewed the information we provide quarterly to Area Panels, significantly reducing the length of our "Taking the Temperature" performance report to fit with the principles above. We estimate this change, focusing on visualising performance information and geared towards automatable reporting, will save us £5,000 a year by cutting completion times from six hours to 30 minutes.

When Area Panels are selecting their priorities for the forthcoming year we also help by providing contextual information on the surrounding area. Our [Area Factsheets](#) include information on the likes of local antisocial behaviour and unemployment together with comparisons against our other operating regions and national averages.



## Set clear guidelines for meetings

Resident meetings need clear boundaries and guidelines to be effective. Our top tips are:

- Provide a good induction for newly-involved residents. Highlight expected behaviours and examples of effective challenge
- Agree a clear code of conduct. We worked with a theatre company to recreate examples of unacceptable behaviour and invited staff and residents to challenge it and suggest alternatives
- Set clear terms of reference. This is especially helpful in preventing residents using meetings as an opportunity to air their frustrations on a personal matter
- Provide training on committee and chairing skills to ensure terms of reference are kept to
- Encourage residents to challenge peers when they raise issues outside the remit of a meeting
- Create clear pathways for residents to escalate issues
- Put in place dispute resolution procedures
- Explain you won't always say yes. If a request would take a disproportionate amount of time, explain your efforts to find an answer wouldn't offer value for money. Where possible offer an alternative instead.
- Agree service standards including deadlines for papers, agenda items and dates by which requests will be responded to
- Coordinate calendars between different meetings and events. Some residents will be involved in various task groups, panels and forums so try to avoid clashes. We've created an online governance calendar so staff can view meetings before scheduling their own. We've also added an [events calendar](#) to our website so residents can organise their own diaries.



## Key Recommendations

- ✓ Design training packages tailored to each component of your involvement offer (i.e. one for mystery shoppers, one for task groups...)
- ✓ Let residents determine which bits of the business they want to scrutinise and when, collect their own data and help determine scrutiny budgets
- ✓ Recognise the strengths and weaknesses of different sources of resident input and cross-check them to see if messages are consistent
- ✓ Establish clear guidelines and service standards for meetings
- ✓ Supply meeting attendees with information (surveys, consultation findings etc...) to ensure decisions are evidence-based.

## Next steps

We hope this toolkit provides some useful pointers on how to involve your residents more effectively. While we've referenced our approach throughout, we're not suggesting it forms a template for engagement. Nor do we claim to have all the answers. If nothing else, we hope the toolkit provides food for thought, some inspiration about what's possible, and maybe a few ideas you can implement straightaway.

**We're holding an 'open day' on Friday 27 November 2015** to let providers learn more about what we do, network with likeminded staff and discuss approaches to resident involvement. For further information please contact Charles Glover-Short on 0208 726 8656 or [charles.glover-short@micushorizon.org.uk](mailto:charles.glover-short@micushorizon.org.uk).

## Appendix One

# Our Resident Governance Structure

Group	Details	Responsibilities
<p>Area Panels (eight panels, one for each of our operating areas)</p>	<ul style="list-style-type: none"> <li>● Between eight and 12 full members (with voting rights). At least two thirds should be either lead or joint AmicusHorizon tenants</li> <li>● Any remaining attendees made up of independents, local authority nominated representatives, and residents who aren't named on a tenancy</li> <li>● Up to three additional members (for a term of a year, without voting rights)</li> <li>● All positions are appointed through a selection process</li> <li>● One strategic board member link (observer, not a panel member)</li> <li>● Minimum of two staff (the respective Head of Area and Resident Governance Officer), but on average four depending on the agenda and who the panel wishes to invite. Staff are not members of the panel, but attend to facilitate and answer questions.</li> </ul>	<ul style="list-style-type: none"> <li>● Scrutinise performance</li> <li>● Champion residents</li> <li>● Set local priorities</li> <li>● Agree local offers and budgets.</li> </ul>
<p>Residents' Council</p>	<ul style="list-style-type: none"> <li>● Two resident representatives elected to represent each Area Panel (16 in total)</li> <li>● On average seven staff depending on the agenda and who the Council wishes to invite</li> <li>● Staff are not members.</li> </ul>	<ul style="list-style-type: none"> <li>● Reflects and communicates the views of the Area Panels</li> <li>● Holds our board and Executive to account</li> <li>● Scrutinises service delivery</li> <li>● Ensures all customer-facing strategies and policies are sufficiently customer-focused before they are presented to board.</li> </ul>

Group	Details	Responsibilities
Repairs and Maintenance Panels (RAMPS) (x three; one for each of our operating regions)	<ul style="list-style-type: none"> <li>● Between eight and 12 full members</li> <li>● Minimum of one and maximum of three representatives from the region's Area Panels</li> <li>● Remaining places filled by other residents (including one not named on a tenancy i.e. not a lead or joint tenant)</li> <li>● Minimum of two staff (the respective Regional Asset Director and Resident Governance Officer), but on average four depending on the agenda and who the panel wishes to invite. Staff are not members, but attend to facilitate and answer questions.</li> </ul>	<ul style="list-style-type: none"> <li>● Scrutinise repairs and maintenance services.</li> </ul>
Strategic board	<ul style="list-style-type: none"> <li>● 12 elected members including four residents</li> <li>● The Residents' Council Chair and Vice Chair attend as observers (they're not amongst the four resident members). This means all roles in the Resident Governance Structure retain independence from strategic board, but still have vital communication links</li> <li>● Seven staff usually attend.</li> </ul>	<ul style="list-style-type: none"> <li>● Makes decisions concerning the wider strategy and finances of the association.</li> </ul>

## Appendix Two

# Our informal opportunities for involvement

The task groups below are reviewed annually by our Residents’ Council to meet scrutiny needs.

	Group	Responsibilities
Task Groups	Tenancy	Works to ensure compliance with the HCA’s Tenancy Standard
	Diversity	Works to ensure we’re an inclusive employer. Complements the work of our Diversity Engagement Group, which comprises both residents and staff
	Resident Involvement & Governance	Works to ensure compliance with the HCA’s Tenant Involvement and Empowerment and Governance and Financial Viability Standards
	Neighbourhood & Communities	Works to ensure compliance with the HCA’s Neighbourhood and Community Standard
	Customer Service & Complaints	Helps shape the customer experience (e.g. through setting service standards) and ensures our approach to complaint handling is solution-focused, transparent and empathetic
	Value for Money	Works to ensure compliance with the HCA’s Value for Money Standard
	Communications	Ensures communications including newsletters address resident priorities and are accessible to all
	Policy	Ensures policies are customer-focused
	Home Ownership & Service Charges	Highlights the concerns of leaseholders and shared owners
For ums / Working Parties / Panels	Residents’ Design Quality Forum	Ensures resident priorities are addressed in the design of new homes
	Homeowners forum	Raises issues pertinent to leaseholders and shared owners
	Equality and Diversity Forum	Helps us adapt services to be accessible to all
	Older Persons Forum	Highlights the needs of residents over 50 or those living in homes for older people
	Youth Forum	Influences and leads on services for residents under 21
	Digital Working Party and Editorial Panels	Helps shape our approach to digital inclusion and ensures communications via all channels are accessible for all
	Procurement Panel	Helps shape our contract specifications and selects contractors

Other involvement options:

- **Mystery shopping:** residents can volunteer to test compliance with our customer service standards
- **Green ambassadors:** residents can become local advocates for reducing environmental impact
- **Estate inspections:** residents can join their housing officers, estate services teams and others in the local community to identify how their neighbourhood can be improved
- **Resident monitors:** following training, residents can volunteer to post-inspect repairs and home improvements in conjunction with a Technical Inspector. Their role in reality-checking customer service was recognised at the 2015 Customer Scrutiny Inspection Awards.
- **Membership of a sounding board:** residents can become part of a 1,000+ strong 'Your View' panel to which we send draft policies and strategies for comment
- **Single Action Groups:** residents can take advantage of our community grants scheme to set up their own 'Single Action Group'. These are groups founded to resolve a specific issue and are typically disbanded once they've done so. Such groups can be an effective form of engagement for residents wanting to get something changed / fixed, but not wanting to commit to more regular involvement
- **Resident Associations:** we support residents to form their own associations. Some are borne out of Single Action Groups as residents see the potential for shaping services
- **Surveys:** residents can take part in short ad-hoc surveys about new services or policies at community events, on their doorstep or over the phone. We also conduct over 10,000 general satisfaction and transactional (e.g. to review a recent repair) telephone surveys annually
- **Comment cards:** residents can leave feedback online or fill in a comment card available at our local offices or on request through the post.



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