

Wiltshire Council

Environment Select Committee

12 April 2016

Final Report of the Resident Engagement Task Group

Purpose of the report

1. To present the findings and recommendations of the task group for endorsement by the committee and referral to the Cabinet Member for Housing, Leisure, Libraries and Flooding.

Background

2. As part of its commitment to providing high quality, customer driven services, the Wiltshire Council Housing Board agreed to critically review housing management services' approach to resident participation and scrutiny arrangements. This review was carried out externally during March 2014.
3. Following the review a three year resident engagement strategy and an accompanying action plan were produced, along with the implementation of a new resident engagement structure.
4. On 1 September 2015 Environment Select Committee received a briefing note on the changes to the council's approach to resident participation and scrutiny arrangements. This followed the review of how well resident engagement and tenant-led scrutiny worked in practice, and whether the main residents groups were achieving their objectives and demonstrating value for money. The outcome of the review was that:
 - Overall, the Council's tenant participation and co-regulation arrangements at Wiltshire Council were weak.
 - The Council was unable to demonstrate that it effectively consult with residents (tenants and leaseholders) about strategies and policies, nor that co-regulation is helping to deliver continuous improvement.
 - Resident engagement and co-regulation strategies were not fit for purpose as they lacked direction and objectives, and lack evidence of effective arrangements for delivery.
 - Formally engaged residents did not consult with, nor were clearly accountable to, the people they represented.
5. The committee considered that there was an opportunity to engage with other housing associations in the county and agree a more cohesive (though not necessarily identical) model of tenant participation.

6. It was resolved by the Environment Select Committee on 1 September 2015 to notify Overview and Scrutiny of the Environment Select Committee's intention to form a Resident Engagement Task Group.

Terms of reference

7. The following terms of reference for the task group were endorsed by the Environment Select Committee on 12 April 2016:
 - i. To learn about the resident engagement arrangements in place at Wiltshire's three largest Registered Social Landlords (RSL): Greensquare, Selwood Housing, and Aster Communities.
 - ii. To consider areas of good practice from all three RSL's, and to compare these with the resident engagement arrangements in place at Wiltshire Council.
 - iii. To draw conclusions about best practice and make recommendations to the cabinet member for housing.

Membership

8. The task group comprised the following membership:
Cllr Richard Britton (Chairman)
Cllr Terry Chivers
Cllr Jose Green
Cllr Mollie Groom
Cllr Graham Payne

Methodology

9. The task group received evidence from the following witnesses:

Wiltshire Council witnesses:

James Cawley	Associate Director for Adult Care and Housing
Cllr Richard Clewer	Portfolio Holder for Housing and Libraries

External witnesses:

Jenny Spoor	Head of Neighbourhoods (Greensquare)
Julie Bielby	Community Involvement Manager (Greensquare)
Antony Higgins	Involvement and Improvement Manager (Selwood)
Marc Robins	(Selwood)
David Allford	Customer Engagement Manager (Aster)
Kerry Muir	Customer Involvement Facilitator (Aster)

The Task Group is grateful to all witnesses for giving their time to contribute to this scrutiny review.

10. The following evidence was received by the task group:

- Wiltshire Council Resident Engagement Strategy
- Wiltshire Council Resident Engagement Scrutiny Briefing (October 2015)
- Tenant Involvement and Empowerment Standard (April 2012) – Homes and Communities Agency
- Family Mosaic – Changing Places: How Can We Make Resident Involvement Relevant?
- Aster Communities and Synergy Housing Customer Involvement and Community Development Strategy 2013 – 2016
- Greensquare – Empowering Customers
- Selwood Housing - Community Engagement Strategy 2013-16

11. The task group performed visits to the following housing providers within Wiltshire:

Greensquare,
Selwood Housing,
Aster Communities.

The aims of the meetings were to gather evidence of existing resident engagement arrangements outside of Wiltshire Council in order to learn from particular areas of good practice within the organisations, and to note any improvements which had been performed regarding engagement methods and the lessons which had been learnt from them.

12. The Task Group met five times with the aims of each meeting demonstrated in the table below:

Date of meetings	Item / topic	Details
2015		
16 Nov	Scoping	Meeting with James Cawley and Cllr Richard Clewer.
2016		
18 Jan	Meeting with Greensquare	Evidence gathering meeting between the task group and representatives from Greensquare Housing.
29 Jan	Meeting with Selwood	Evidence gathering meeting between the task group and representatives from Selwood Housing.
01 Feb	Meeting with Aster	Evidence gathering meeting between the task group and representatives from Aster Communities.
24 March	Final Report	To consider the evidence and information from the task group's meetings with housing providers, and what recommendations should be included in the final report.

13. Some initial conclusions and findings were discussed by the Task Group with James Cawley, Associate Director for Adult Care and Housing, and Cllr Richard

Clewer, Portfolio Holder for Housing and Libraries at a meeting on 24 March 2016.

Key Findings

The Importance of Purpose and Objective Setting

14. One of the three housing providers posed a number of questions to the task group:
 - Why is resident involvement needed?
 - What is the minimum resident engagement needed/required to be performed, and how far above this does it make sense to go?
 - What are the key challenges?
 - How is successful resident engagement measured?
15. The questions above emphasised the importance of defining a purpose before defining resident engagement mechanisms so that the methods and selection of techniques best suit the organisation's purpose. Dependent on the organisation's reasons for seeking to engage residents, it can be used to meet one or more of the following incentives:
 - An existing obligation to do so (e.g. from government development funding or governance reviews).
 - Tenants are a resource with relevant knowledge and experience that can be harnessed to improve processes.
 - Resident engagement improves tenant satisfaction and as a result benefits the provider and its image.
16. The defined purpose (either one or a combination of the above) would impact upon the way resident engagement was measured and the subsequent methods which were chosen and implemented.

Target Setting

17. Two providers set a target for resident engagement of 10% involvement across the provider's properties. The total engagement figures were based upon counting each engaged property only once.
18. The third provider considered that it was important to ensure that resident engagement methods created meaningful results which added value to the business as a result of their work. As a result their targets were based upon measuring the number of positive organisational changes arising directly from resident engagement. The target set was a figure of 50 annual organisational changes resulting from resident engagement activities. Organisational changes were measured through the monitoring of recommendations from resident engagement groups and their subsequent implementation.
19. The task group were not aware of any such budgeting process taking place at Wiltshire Council.

Resource Allocation

20. Two providers had dedicated budgets to support resident engagement and the achievement of their engagement targets. The third provider's budget was set through a discussion with the resident engagement team over what budget was required to meet their specified purpose and objectives. After this discussion a budget was set which reflected what resources were required to perform engagement which would meet the organisation's targets.
21. The task group is not aware of any corresponding process at Wiltshire Council.

Methods Observed as Functioning Well

22. Whilst there was a degree of continuity between the providers regarding the methods which were demonstrating good practice, differences were observed in the implementation of some of the methods. There were also examples of methods which were unique to a single provider.

Resident Scrutiny

23. All resident scrutiny panels were comprised entirely of residents who decided their topics of focus and agendas. Assistance was offered from staff members to help ensure that the work was performed in areas where practical recommendations could be formed and implemented.
24. Across all providers scrutiny panels were noted as a means of positive and effective resident engagement which successfully identified areas capable of improvement and added value to the organisations.
25. One provider followed the scrutiny process with an initial response to the scrutiny panel, with subsequent follow-ups after three months and six months.

Standing/Focus Groups

26. Standing and focus groups were formed to address specific aspects of ongoing work or engagement. These included:
 - Homes, repairs, and planned maintenance
 - Some aspects of new development plans
 - Anti-social behaviour
 - Diversity
 - Learning and disability
27. One-off focus group meetings consultations were organised by Aster based on their particular priorities for the year, with room to adapt if these changed. Residents were invited based on whether or not their profile showed them as having an interest in the particular consultation.

28. Difficulties with focus groups arose when a large number of residents were in attendance at a meeting. This resulted in a potentially chaotic discussion during the session, which made reaching clear and constructive outcomes difficult. Focus groups were more successful when a smaller number of representatives from the relevant communities were in attendance to put forward the collective views from their localities.

Surveys

29. Surveys were in use by all three providers as a form of engagement and were noted by providers as a cheap and effective form of resident engagement. The surveys were made available through a number of means: online, phone, door to door, and through short text surveys. Selwood also made surveys available to residents through a freestanding Ipad station located in their reception.
30. Answers to surveys were most effective and valuable when they were targeted towards residents who were known to be relevant to the survey's topic. Selwood targeted their surveys specifically to customers who had a relevant interest; one method of this was conducting door-to-door surveys in areas with a relevant interest in the survey topic. Greensquare was currently using an online survey mechanism titled "Greenview" which allowed residents to create an account and respond to incentivised surveys and polls. By using Greenview as a method allowing residents to decide which surveys to respond to Greensquare had experienced 40% engagement with their online surveys.

Community Representatives

31. The community representative scheme generally consisted of a single volunteer within a locality or estate who performed monthly inspections of their local area. The inspections resulted in a report which detailed various issues identified as needing addressing.
32. In response to the reports produced by the community representatives, an annual summary would be produced which listed the issues and any responsive actions. Issues which were not the responsibility of the provider were discussed with the community representatives.
33. The scheme was noted as an effective form of issue reporting with a good response to the request for community volunteers. However, it was noted that it was important to create a clear distinction between the responsibilities of the community representatives and the Housing Managers to avoid any confusion for residents.

Training

34. Training was offered through a variety of methods including links to organisations providing opportunities for free training. Many training schemes involved improving IT skills. "On the job" training was also provided through membership to resident engagement bodies, such as the scrutiny panels. Basic training such as gardening or DIY skills was also sometimes provided.

Methods Observed as Having the Potential for Improvement

Recruitment

35. Some challenges were experienced with recruitment onto resident scrutiny panels or focus groups. Those recruited were typically from the older demographic. This was particularly noted on groups such as the resident scrutiny panels, where both pre-existing skills and knowledge along with spare time to perform scrutiny work was required. Because of this there was a degree of acceptance that those with the skills and time available would typically be of retirement age.

Incentives

36. Incentives were offered at all providers for resident engagement, however they were either being withdrawn, reviewed, or reduced. This was due to evidence suggesting that incentives had either a minor or no measurable impact on the levels of resident engagement. In some cases the incentives were converted into rewards to thank residents for their involvement.

Magazines

37. Magazine publications were noted as having varying degrees of success at each housing provider. Greensquare's resident magazine was under review due to a low take-up and the level of resources required maintaining publication.
38. Selwood's magazine was designed by a standing group comprised of residents. This magazine was reported as receiving good feedback from each issue.

Digital Involvement

39. Providers noted that relevant information was available online, but not always frequently accessed by residents. This was in part due to the website not being clear enough with directions to the information. As such importance was placed on providing residents with a website that not only contained relevant information but also provided a logical and friendly customer journey structure.
40. Progress with training and providing more digital engagement was also anticipated to give important wider benefits, such as encouraging residents to use digital for other functions, such as online payments and repairs reporting.

Social Media

41. Social media was generally used to share positive stories on work performed by the organisation, event publicity and invitations, and "meet the team" introductions from staff. However, social media profiles and activity only received, at best, moderate engagement levels from residents. It was noted by a provider that this method could be better utilised in the future.

Conclusions from Observed Resident Engagement Methods

Community Representatives

42. Community representatives successfully provide an effective form of connection between local communities and Head Office through the local Housing Manager. It was important however to ensure that there is a clear distinction between the roles of the Community Representative and the Housing Manager so that residents knew who to speak to regarding local issues.
43. Voluntary representatives provide key information on issues within a local community such as fly-tipping in a monthly report. Value added to the community was clearly seen through the production of six-monthly reports detailing the actions taken in response to reported issues.

Scrutiny

44. Scrutiny panels are generally allowed the freedom to decide their own areas of work with advice from staff to help ensure relevance. Effective areas of scrutiny focus included policies and procedure. Assistance could be provided to ensure that the scrutiny panel is able to provide realistic and practical recommendations.
45. To ensure that both members of the scrutiny panel and residents are aware of the positive value added by this function it was important to provide an initial response to the scrutiny panel's work. Subsequent follow-up responses were also important to further track the progress of their recommendations. This work can be promoted by the organisation to allow other residents to see the positive impact of resident engagement work, and attract potential recruits to the engagement process.

Focus Groups

46. Focus groups work best when tailored to respond to a specific issue or topic; this gives the focus group a sense of importance for residents. As a result it promotes involvement from residents.
47. Focus groups are used when there is a single issue that requires addressing within a short space of time. Relevant resident representatives can be invited to the focus group meeting along with staff members to discuss the topic and create a meaningful and realistic actionable outcome.
48. Focus groups appear to work best when they are kept small and focused on a single issue. This helps avoid situations where meaningful debate and outcomes are overshadowed by the number of people contributing to the discussion.

Surveys

49. Surveys provided the best value to an organisation when they were in some form targeted to residents who had an interest in the survey's topic. Relevance could be identified through digital methods, where resident profiles are created and the organisation can target surveys to the relevant resident profiles. Engagement styles can be identified through allowing residents to submit a preference on how they would like to get involved, either through new styles (digital) or traditional (post, phone etc.).
50. Through digital surveys residents could also be allowed to decide for themselves which surveys are relevant to them. This requires the promotion of the survey's online location to ensure that residents are aware of its availability.
51. Surveys were least successful when they were lengthy and non-specific. Residents did not engage with surveys they felt would take up too much time, held little or no relevance to them, or would not provide any meaningful outcome to their wellbeing.

Digital Engagement and Training

52. Digital skills training can be offered to residents as a key learning and development area for all ages. Advantages noted from providing free access to digital skills workshops included providing residents with the abilities necessary to engage digitally in all aspects of the organisation, such as online payments. Traditional methods of contact can be maintained whilst a move towards digital is implemented.
53. In order to promote online engagement the website for residents should be structured clearly to predict where they would look for information. The website should also be made mobile and tablet friendly. Once these are in place and promoted then residents can become accustomed to accessing the digital information which may already be available, but considered too much effort to locate.
54. Digital engagement should be strongly promoted as a form of training for residents to become accustomed to using digital methods for other tasks, such as various payments or the "MyWilts App" for reporting issues.

Conclusions from the Task Group's Wider Considerations

Setting a Defined Purpose for Resident Engagement

55. Before deciding upon resident engagement methods it is important first to define why it is being implemented. The defined purpose of resident engagement by the organisation should guide what objectives need to be set to measure what is defined as "successful engagement".
56. The diagram below illustrates how once a purpose has been defined then so can the objectives. Once this has been done it is easier to define the resources required and the most appropriate resident engagement methods.

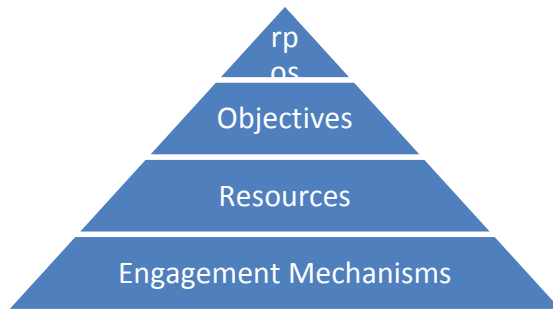


Diagram 1.

57. If the purpose of resident engagement is to meet legal requirements, or as a way to improve a successful bid for government funding, then all that is needed is to meet the minimum expectations for resident involvement.
58. If tenants are viewed as a resource with relevant knowledge and experience which can be used to benefit the organisation then an extensive use of focus groups and scrutiny acting as an 'internal consultancy' might be most appropriate. The effects and positive outcomes from resident participation need to be maximised through clear identification of tenants with relevant skills and interest to get the most from involvement.
59. If the process of engagement is aimed primarily to improve satisfaction among tenants and as a result benefit the organisation then extensive communication with tenants is required to promote the awareness of tenant participation. Investment in Focus Groups, Scrutiny Panels and other mechanisms of engagement is also required to improve their performance.
60. It should be noted that the above purposes are not mutually exclusive and that one or a combination of them can be used to define an organisation's reasons for performing resident engagement.

Target Setting and Objectives

61. Objectives and targets are needed to measure the meaningful forms of resident engagement as defined by the organisation's purpose. Until both the purpose and objectives have been defined then discussion of specific resident engagement activities takes place in a vacuum.
62. Objectives are best used to measure the overall success of the resident engagement strategy in how far it has achieved whichever purpose has been defined. This can be done through one or more of the following methods:
 - i. The percentage of total tenants engaged
 - ii. The total number of overall engagements
 - iii. The total number of process/organisational changes implemented as result of tenant engagement
63. Measuring the percentage of engaged tenants or the overall number of engagements illustrates raw levels of tenant engagement, whereas measuring

the total number of process/organisational changes implemented as a result of tenant engagement provides a mechanism which illustrates the level of meaningful engagement created by the organisation's resident engagement strategy.

Resources

Budget Setting

64. Whilst two providers were currently performing resident engagement through a dedicated pre-set budget, this approach may not provide the most effective way of allocating a budget. This was due to the possible risk of setting the budget without adequate consideration of the strategy's purpose and objectives.
65. The method used by the third provider, where the budget was negotiated in consultation with the resident engagement team, demonstrated a more effective means of meeting a specified resident engagement purposes and its objectives.

Resident Engagement Mechanisms

66. Resident engagement mechanisms should be chosen and implemented to specifically meet the defined objectives and overarching purpose of resident engagement as stated by the organisation. This appears to contrast with the current Wiltshire Council approach as specified in their Resident Engagement Strategy, which appears to the Task Group to seek to provide a comprehensive and all-embracing set of engagement mechanisms.
67. The following diagram shows a suggested analysis of three different focuses for the selection of the most appropriate forms of resident engagement which are explained further below (paras 68 – 71):

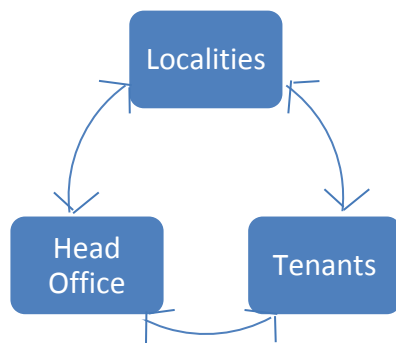


Diagram 2.

Localities

68. For each locality/neighbourhood there should be community representatives acting as a link between the tenants and the Housing Manager at the Head Office (see para's 42 and 43).

Head Office

69. The Head Office focus deals with internal issues, systems, and procedures where the most appropriate engagement method would be the scrutiny panel (see para's 44 and 45).

Tenants

70. This focus of activity is concerned with communications with and inter-relations between tenants and Head Office, on matters such as:

- i. Rent collection
- ii. Arrears
- iii. Repairs
- iv. Maintenance

71. The most effective and appropriate form of engagement here would be focus groups (see paras 46 to 48).

Selection and Outcomes/Feedback of Engagement Work

72. The below diagram illustrates the way the above structure could be implemented:

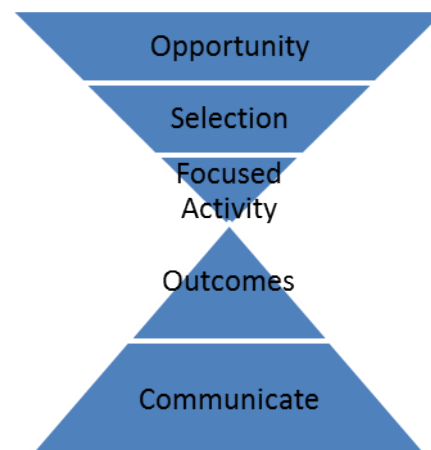


Diagram 3.

Opportunity and Selection

73. The opportunity section at the top of the diagram represents the importance of extending engagement opportunities to every resident. This can then be followed by more targeted methods to recruit focus groups and the scrutiny panel, leading into their very focused engagement.

Outcomes/Feedback

74. Feedback from the outcomes of all aspects of the work from all resident engagement mechanisms needs to be given maximum possible exposure to all

tenants. This ensures that both those engaged and those currently not engaged are aware of the meaningful results being performed as a result of resident engagement work.

75. Promotion can be done through a variety of means, including social media and organisation publications. This form of promotion is an important activity as not only does it advertise the positive aspects of becoming an engaged resident, but it also promotes the good workings of the organisation itself.

Recommendations

The Task Group recommends that the Cabinet Member for Housing, Leisure, Libraries and Flooding considers the following:

- 1. To ensure that Wiltshire Council has defined a precise purpose and overarching aims for its resident engagement programme as a framework for the identification of the most appropriate resident engagement mechanisms.**
- 2. To ensure that the Wiltshire Council Resident Engagement team has targets and objectives for their engagement programme developed in line with the agreed purpose(s) set for resident engagement. These targets and objectives should be based on either or both of the following:**
 - a. Involvement-based: objectives which measure the number of residents involved in resident engagement activities or engagements performed.**
 - b. Outcomes-based: objectives which measure the total number of meaningful outcomes or organisational changes made as a result of resident engagement activities.**
- 3. To follow the more focused approach as defined within the report (paras 55 to 75) in order to enable an inevitably limited budget to be used more cost effectively, and to agree priorities with the resident engagement team as a crucial part of the resource allocation process.**
- 4. That the following methods should be pursued by Wiltshire Council as ways to perform the various resident engagement roles explained in diagram 2 (para 67):**
 - a. To establish Community Representatives who will perform routine local surveys to check for issues and provide a point of contact for local residents within every estate/locality where the council has housing stock.**
 - b. To develop a resident scrutiny panel that considers topics in discussion with Wiltshire Council officers to develop effective and realistic recommendations.**

- 11. For the Environment Select Committee to receive an update report on the progress of Wiltshire Council's resident engagement strategy and its outcomes in twelve months.**

Proposal

76. To endorse the report of the Task Group and refer it to the Cabinet Member for Housing, Leisure, Libraries and Flooding for response at the Committee's next meeting.
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Cllr Richard Britton, Chairman of the Resident Engagement Task Group

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Appendices

None

Background documents

None