



Scrutiny Review Report & Recommendations

Meaningful Information for Customers

Customers to know how their Landlord is Performing

Final Report – December 2022

1. Our Report

Insight was invited to scrutinise customers' information needs to explore what represents meaningful information for customers. The purpose of review was to gain understanding which could be used to influence how information is shared with customers in relation to the new Tenant Satisfaction and Financial Measures (TSMs).

The report summarises our findings and what we would like to happen next.

2. Our Approach

We carried out this scrutiny during September and October with support from Tracy Gregory, Customer Scrutiny Co-ordinator, as follows:

- We met the Director of Assurance, who presented the scrutiny idea, we felt it would add value. We met a second time to discuss detail to agree an aim and scope for review.
- The Communications Business Partner gave an overview of Great Places' vision and on-going work to create comprehensive 2-way customer communication and dialogue.
- Head of Financial Services told us of financial information already published in several reports, which may be shared alongside TSMs data
- We carried out a desktop review of Great Places' new website, customer publications and reports to compare with information landlords will soon be required to share with customers, in order to comply with new regulatory requirements.
- We surveyed customers to ask what would make information meaningful. We also looked at results of consultation of the e-News, carried out in 2021 to identify themes.
- We looked for learning in good examples of information published by other landlords.

When we met with the Director of Assurance, we learnt landlords are shortly required to share information with customers and that this forms part of The Charter for Social Housing Tenants, which states, if customers are to hold landlords to account, they need information on how their landlord is performing, what decisions it is making and who is responsible, see appendix one.

We used our scope to set objectives, as follows:

- identify what and how information is currently shared with customers
- consider what other information may be of interest to a diverse range of customers
- suggest what represents meaningful information from a customer perspective
- make it easy for customers who wish to know more to delve a little deeper into data
- ensure information summarises plans and work already being undertaken to improve a weaker performing service, which will attract comments and constructive challenge
- create accessible opportunities for customers to challenge performance via feedback and to comment on how improvements in services can be achieved

We believe we met these objectives, although we can't report on the profile of responses, because surveys were anonymised to encourage greater return. Of the 430 surveys sent we received 78 responses, 18% return rate. We recognise scrutiny needs to represent diverse views so plan to seek support of the Business Intelligence and Customer Involvement teams.

Our proposed recommendations, see appendix four, focus mainly on content and presentation of information to support accessibility for a wide range of audiences.

3. Our Findings

Review of information accessible to customers

- There's a section on the website which shares information, including an annual report, bi-annual magazines and e-News emailer, published throughout the year. E-News is an email that 'spotlights' headlines, information, events and opportunities for customers.
- Newsletters are distributed digitally, where records don't hold a customer email a hard copy is sent by post – we'd like Great Places to proactively seek greater understanding of customers' engagement and accessibility to information.
- The Hub telephone number and email address is printed at the base of each page as standard for customers to easily locate. We noted the Autumn magazine featured a QR code in an article that gave convenient access to the customer portal.
- The Customer Annual Report contains performance and satisfaction information and magazines and e-News give updates during the year. We were encouraged to hear of an improved approach to formatting customer communication, which promises to give a greater more cohesive view for customers.
- We didn't find a regular customer update of performance or satisfaction information for customers. Work is underway to revise the Service Delivery Framework, which contains service standards that will support regular updates.
- In-depth detail of performance and financial detail is published in reports on the website these include the Corporate Annual Report, Financial Statements and an Environmental, Sustainability and Governance report.

The Head of Financial Services discussed that it may be useful for this detail to sit alongside and support the TSM detail, so information is more comprehensive.

- A gap analysis has been carried out of information already published to compare with detail outlined in the Tenant Satisfaction and Financial Measures.
- Customers aren't proactively invited to comment on performance or satisfaction information to capture their views. We found this isn't unusual, we didn't find any website offering this opportunity to customers to feedback on data. In general, comments are often fed back using social media, which tends to be mainly negative. Currently, feedback is gathered via consultation or following a service transaction.

We're aware a new 'digital engagement tool' has been procured, which is expected will encourage greater engagement from a wider, more diverse range of customers.

- We learned information relating to services such as repairs, customer hub and housing management is collected in Aareon, therefore, in future it should be possible to drill down into more detail to show themes and trends by area / regions.

We conclude it's important to;

- present information to show a wide comprehensive view, that's joined up (comms new revised approach), which is relatable and reflects customers' experiences.
- information needs to inform and give narrative, to explain trends and action taken
- information to tell a continuous story, referring back as well as projecting forward
- include opportunity for customers, who may wish to delve deeper to access more detail
- ensure information is useful, include links and detail to contact relevant teams

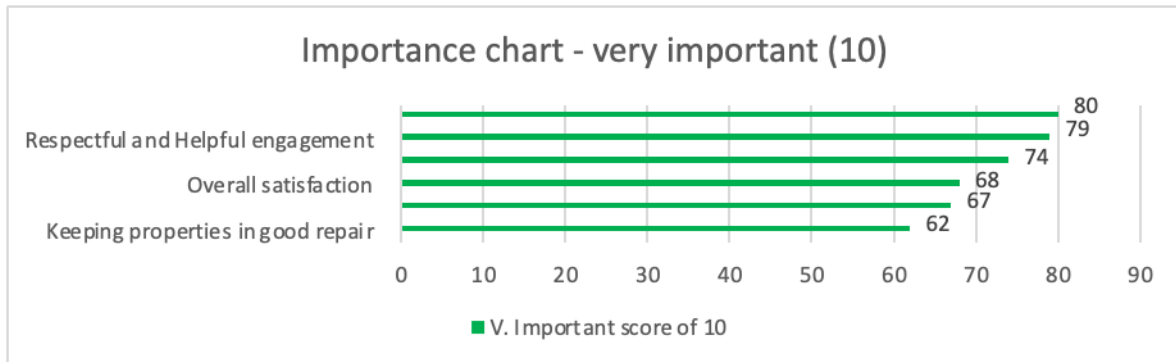
Review of what customers said when asked what would make information meaningful

We emailed 430 surveys to customers, who'd recently expressed dissatisfaction with being kept informed by Great Places and received 78 responses. We arranged for a message and a survey link to be added to the acknowledgment email, customers receive when contacting The Hub. We can confirm 10% of all responses were sent via this route.

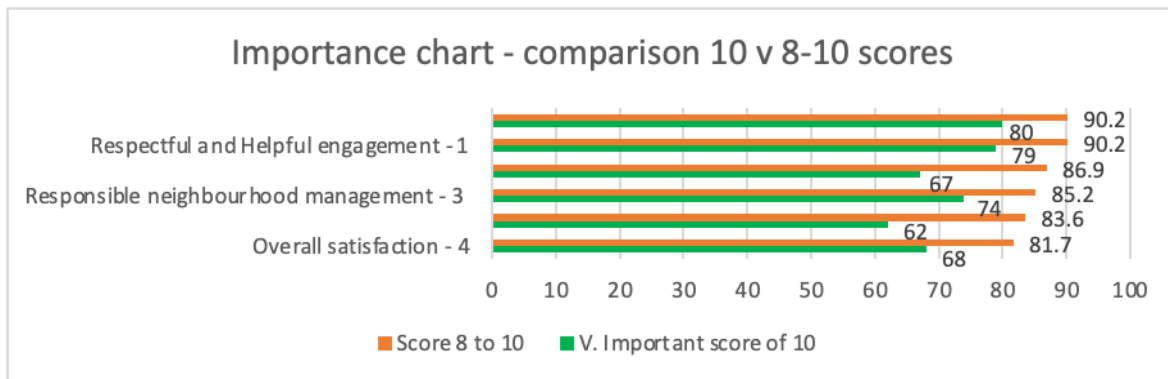
We asked customers how they usually read news / information about Great Places, 51% of responses said the customer newsletter made up of 27% hardcopy and 24% online that is 21 and 19 customers, respectfully, whilst 14% of responses read the e-News, 11 customers.

When asked how important it is to see information of performance and spend, relating to management costs and executive remuneration, in relation to size of landlord, 51% of 78 responses scored 10 (very important) and 63% of 65 responses expect updates quarterly, a smaller percentage, 15.4% said they only needed to see information annually. **Customers feedback to explain their reasons for scores can be found in appendix two.**

Customers scored importance of being kept updated of each tenant satisfaction measure, results are displayed in the chart in order of importance for scores of 10, 'very important'.



The second chart shows order of importance using scores of 8 to 10 which is compared to results from the first chart, scores of 10. We observed a slight difference in order of importance, when a wider collective of scores is plotted. In both charts, it's clear customers scored 'effective handling of complaints' and 'respectful and helpful engagement' as most important. We saw 'maintaining building safety' and 'keeping properties in good repair' was scored with greater significance, when considering a larger range of scores.



Customers said it was very important to see financial measures, including CEO and executive team salaries - in our survey 51% scored this 10 whilst 53% said it was very important to see detail of management and operational costs.

Customers feedback to explain their reasons for scores can be found in appendix two.

Customers were asked to define what represents meaningful information, they said;

- clear to understand, this doesn't necessarily mean simple
- relevant and significant – customers can relate to the information
- must give context and a broader view not just figures and
- be accessible to a wide range of audiences, see appendix two

Customers added to be accessible information should be presented as follows;

- be engaging, interesting, fun and friendly,
- use a mix of images, graphics, charts and videos but not be cluttered,
- easy to find with prompts to raise awareness of information, and
- be useful and informative offer customers the ability to delve deeper via links, or make enquiries, add details to enable customers to act on information

In the Charter for Social Housing Residents, it's outlined customers need to know how their landlord is performing, in order that they can hold them to account. Picking up on this point our last two survey questions asked customers, how important it is to be able to;

- comment on published information shared by Great Places, and
- feedback on the presentation of the information

We can confirm from 53 customers who responded 57% scored 10 that it's very important to be offered an opportunity to comment on the information and 51% scored 10, indicating it's very important to be able to feedback on presentation of information.

We were told customers are invited to feedback on presentation layout in the e-News and customer newsletters, which we feel is a good step. We would like this option to feature in all customer publications in a clear and standard format, so it is easily recognisable.

Summarising evidence for information to be meaningful key themes were:

- offer accountability, customers want to see a whole view this shows transparency,
- be published quarterly to update on trends,
- include feedback, customers feel reassured views are heard, understood and acted on,
- clearly illustrate investment of money and explain spend decisions. Customers often say information needs to be relevant to where they live, after analysing comments we feel this refers to more than just geography, it's about giving assurance of value for money,
- not be full of jargon, information needs to be easily understood and digestible,
- see a wider view to show challenges that impact services and what action is being taken,
- show fair treatment and respect - customers want to see that Great Places care about communities, explaining decisions could help demonstrate this to customers,
- be accessible by a range of audiences - presented clearly using everyday words
- situation specific and contextualised, referenced in customer newsletters and e-News
- other information customers said was important was detail of percentage of empty properties, periods of vacancies, show improvements in weaker performing services, no. of staff in areas and repair timescales / costs

Based on customer feedback and some input from Insight, we conclude it's important to;

- provide data not just for knowledge, but for action to drive improvement
- add lines (in bullet format) where performance or satisfaction has dropped to explain improvement actions, which are planned, have been made / when this will be resolved
- hear how information / feedback has influenced improvement
- use qualitative data, as well as quantitative data from transactional surveys
- allow customers to feedback and make suggestions, based on the information shared

Summary of customers' concerns highlighted in comments;

Customers wish to understand and gain assurance from information, we noted an inference that if experiences don't reflect published information, there can be feelings of mistrust towards their landlord.

Customers have expressed a need to see open and honest information, which reports on and explains under performing services or areas of challenge. Without this transparency for some customers there may be disparity between published information and the experience, which can create barriers to engagement, *see recommendation numbers 1, 4 and 5.*

Review of other social landlord website features we liked were;

- a mix of graphics and text displaying an easy visual of information, *see MSV's website*
- formatting provides a snapshot of article, which allows reader to click through to access further detail, example website that use this feature are BBC news / Peabody HA
- customer publications and related information is grouped together, or contain links to other sites, examples of this can be found on Peabody HA and Cobalt Housing websites

See appendix three for full detail

We would like information to show customers a broad view of spend to provide a wider more balanced view, including costs, which fall outside Great Places control. For example, the requirement for landlords to install CO2 detectors or a breakdown of costs associated with 'repeated visits' to demonstrate challenges in relation to housing funds. As a result of our scrutiny work members have a greater understanding of social housing and competing priorities for funds and resources. We feel information can be used to raise awareness and provide greater perspective to build better relationships.

We conclude it's important to;

- promote information widely to raise awareness and ensure it can be easily located
- present and format information that encourages customers to engage with the detail
- tell an inclusive story with trends and projections of future targets
- allow engagement with information, so customers can comment on information
- be relevant and accessible to a wide range of audiences.

Discussion and summary

Our scrutiny plan was to investigate customers' information needs to understand what represents meaningful information to a wide range of diverse customers. The purpose of review was to use feedback to support publication of information, so customers know how their landlord is performing.

From our review we were encouraged to hear of a revised communication approach, which long term plans to provide customers with a more joined up comprehensive view of news and information. We'd like work already underway to standardise information to consider further development by pledging an offer to customers defining what they can expect from information. We feel this would offer transparency and give consistency of information, which is easily recognisable.

Summarising customers want information to tell a continuing story, which informs offering a wider view of performance to customers and shows trends, challenges and improvements.

Customers wish to see detail setting out spend, relating to management costs and executive remuneration, in relation to size of landlord, to show Value for Money and investments. In relation to presentation of information customers want to see a snapshot that is visual, easy to digest and understand but that is informative and offers ability to delve deeper. Colour is important as well is a mix of images, charts and graphics with commentary.

Based on our review findings, we'd like to propose the recommendations see full detail in appendix four, to help publish meaningful information for customers. These focus mainly on communication content and presentation of information to support accessibility for a wide range of audiences.

Appendix One

The Social Housing White Paper sets a challenge for landlords to be transparent with performance data as well as financial spend, to share data with customers, encourage a customer response and act on their views.

Regulatory Compliance

The current RSH regulatory standard Tenant Involvement and Empowerment (TIE) Standard has been in place since 2011/12, with a tweak to requirements in June 2017. The exact requirements of the regulator can be found in 1.2.1 and 2.2 of the Consumer Standard on Tenant Involvement and Empowerment.

<https://www.gov.uk/government/publications/tenant-involvement-and-empowerment-standard>

The expectation is to engage with residents in all consumer regulatory standards and in particular to engage residents in the creation, monitoring and suggesting improvements.

Social Housing White Paper (SHWP) – a Charter for Residents, in November 2020

<https://www.gov.uk/government/publications/the-charter-for-social-housing-residents-social-housing-white-paper>

When the RSH develops additional regulatory standards in line with the SHWP in 2021/22, the standards will increase in expectation of landlord's accountability and transparency to residents and customers, in relation to resident involvement. Promise 2, from the government is "to know how your landlord is performing, including on repairs, complaints and safety and how it spends its money so you can hold it to account".

Appendix Two

Feedback customers gave to explain why it's important to have access to performance and information of spend;

- Its important that money is spent wisely, and customers get to know first hand
- Landlords need to be open and transparent
- Interested to see how money is spent, about decisions and priorities
- It's not appropriate for social landlords to not be accountable
- Service experienced should reflect that which is reported to customers
- I want to understand money is invested in existing homes as well as new build.
- How much of rent is re-invested into existing homes?

Customer feedback explaining why it's important to have access to information of spend;

- It is always interesting to know where funding goes and to know that the organisation and customers are getting value for money
- People get too much money whilst our money goes down
- You need to be open and honest - information needs to be online and easily accessible. I can go on my GP Surgery's website and find out GP's salary, you could do the same.
- Tell us how many staff are in each area and what this equates to in spend and how much as an individual do, we contribute

Appendix Three

- *Mosscare St. Vincent* – the website is clear and easy to navigate, it provides comprehensive information about performance, which is easy to digest and uses images and graphics to brighten up text. Detail is published quarterly outlining the six TSMs under a heading ‘How are we doing’ along with financial measures, it shows trends, targets and performance with commentary.

We liked that text highlights updates will be available quarterly on the website and in the customer newsletter; <https://www.msvhousing.co.uk/about-us/how-we-are-doing/>.

- *Guinness Partnership* – presents performance information on their website, which uses colour to differentiate between detail for your home, your community and your voice. Narrative describes the purpose for sharing information, it proactively encourages customers to comment (via a link) on performance, to suggest ideas for improvement and if needs be hold their landlord to account, which supports an open and transparent relationship; <https://www.guinnesspartnership.com/news/measuring-our-performance/>
- *Peabody* – under a heading ‘our performance’ the website highlights key areas of interest and contains links to click through to other reports, if customers wish to delve deeper for greater scrutiny. We like that the ‘sustainability strategy’ has been included with this information, a summary of the strategy document and an advisory video about environmental issues ‘what you can do’; <https://www.peabodygroup.org.uk/about-us/our-performance/performance-and-efficiency>
- *Cobalt Housing* – performance information can be easily found together on the website, although we did find it a little text heavy. The annual customer report uses pie charts to illustrate where funds come from and areas of spend; <https://cobalthousing.org.uk/wp-content/uploads/2022/11/Tenants-Annual-Report-21-22.pdf>

Appendix Four – recommendations

	Customer Comments	Recommendation	Team Response – agreement / action	Lead	When
1	<p>What information customers said will inform how their landlord is performing in a meaningful way?</p> <p>Its important money is spent wisely, and customers get to know first hand</p> <p>Need to be open / transparent</p> <p>Interested to see how money is spent and decisions of priorities</p> <p>Keep up with the changes and improvements being made</p> <p>It's not appropriate for social landlords to not be accountable</p>	<p>Use Tenant Satisfaction and Finance Measures as a foundation to inform of matters customers said were of most importance. The information is to be cohesive, useful and give context to inform providing a wider more universal view of performance (continue work already started by comms and customer experience teams).</p> <p>Information to set out perf. data with quarterly trends, to show;</p> <ul style="list-style-type: none"> • a backward view to summarise, • current performance with narrative to highlight challenges and action taken, • a projection for improvement of services. <p>Financial detail <u>where relevant and appropriate</u> to be used to support statistical TSM info. to enable greater understanding.</p>	<p>This is covered in our plan - for the past 8 months we've included information across platforms aligning with the 7 standards within the White Paper. With the TSM's we'll refine the process and do the same.</p> <p>We have live performance data on our website which is updated monthly and in newsletter e-News and website info. we make sure that the topics highest on the agenda from the White Paper / TSM's. We also have quarterly performance reports on our website.</p> <p>Across the business we need to be a little more proactive regarding reporting of these measures from each department and the plan is already in place to ensure we gather this data from all areas.</p>	Cust. Comms Comm. BP	Live/ongoing December 2022 (Customer Ann Report)
2	<p>Why this information will inform customers, how their landlord is performing?</p> <p>I'm interested where the money is spent and where priorities fall</p> <p>Service experienced to reflect that reported to customers</p>	<p>Info. relating to fin. measures to summarise detail of;</p> <ul style="list-style-type: none"> • where money comes from, • how funds are spent including narrative to justify decisions made in relation to spend priorities, to include • examples not within Great Places gift such as government instruction, CO2 detectors or 'avoidable' spend (failed visits) 	<p>In our ESG, Corporate Annual Report and Customer Annual report we specifically address our finances, where the money comes from and where this is spent. We are working on making this clearer, and more 'customer friendly'.</p>	Head of Comms Cust. Comms Comm. BP	Live/Ongoing December 2022 (Customer Annual Report)

	Customer Comments	Recommendation	Team Response – agreement / action	Lead	When
2	<p>Want to understand money is invested existing homes as well as new build. How much of rent is re-invested in homes</p>	<p>Add links to supporting information in other reports or repurpose and include how customers can enquire in relation to information</p> <p>Customers wish to see info. that demonstrates Great Places provide Value for Money, relevant to rent paid.</p>	<p>We currently report at quite a high level and this report highlights that we should drill down into more detail on what terms such as “Housing management activities” and we will be breaking these down in our customer annual report.</p>		
3	<p>Different needs of information Be relevant to all customers I trust Great Places to invest funds wisely achieving good performance, don’t always need to see information Landlords should be accountable</p>	<p>Give a visual snapshot that is easily understood (doesn’t always mean simple) and continuously informs customers. Ensure there are different ways for customers to access the data. A good example of layout, we saw was BBC News website, it lists headlines, allowing viewers to pick and choose areas of interest</p> <p>Offer customers ability to delve deeper and access more detail via links to another layer of data. We saw examples of other landlords grouping reports of performance on one web page in clear sight for customers.</p>	<p>We are starting to build up layers of information / detail across various platforms. We offer website, monthly e-news, customer newsletter and social media as well as face to face communication.</p> <p>With our latest customer annual report, we will be covering headline topics from the White Paper, then sign posting customers to more detailed information if deemed necessary, in other documents such as the corporate annual report (which is now customer friendly) and the ECG</p>	<p>Comms BP BI - CK Head of BI</p>	<p>Live Q4 22/24 (BI int)</p>
4	<p>Demonstrate transparency Social housing providers need to be open and accountable as far as tenants are concerned I want to understand where and how money is spent, allocated and invested</p>	<p>Offer customers opportunities to comment on information whilst reading the detail, this will allow constructive challenge and 2-way dialogue</p>	<p>We have now introduced a policy whereby our customer facing platforms will as standard have a method via which customers can directly feedback their thoughts on what they are reading.</p> <p>This information is sent to the customer involvement team for reporting and analysis</p>	<p>Cust. Comms BP Head of Customer Voice</p>	<p>Q4 22 / Q1 23</p>

	Customer Comments	Recommendation	Team Response – agreement / action	Lead	When
5	<p>Build trusting relationships Wish to be heard and respected GP quite poor at sharing info. Nothing ever changes As the organisation gets bigger, how will Great Places manage to juggle things</p>	<p>Establish a consistent feedback loop customers can rely on. Agree and advertise regular updates so customers know when to expect information that shows evidence customer voice was heard, acknowledged, responded to and acted on.</p> <p>Add commentary to explain challenging areas and action taken to improve to give a more rounded view and greater insight and understanding for customers.</p>	<p>The introduction of “The Loop” branding this year will be built upon to ensure customers can engage and can see how that engagement has been actioned, throughout all our communications. This concept is featured in all our e-News and Customer Newsletters.</p> <p>Engagement HQ, being introduced next year via the Customer Involvement Team will very much enhance and change the landscape of how customers feedback, very much improving the process and opening lots of opportunities.</p>	<p>Head of Customer Voice Cust. Comm. BP</p>	<p>Live/Ongoing</p>
6	<p>Engagement with information Emails can be easy to miss, hard copies posted aren't We live in a diverse community; we all must navigate</p>	<p>Check customer accessibility to information, proactively review engagement with the data to highlight any areas for improvement.</p> <p>Use different methods to promote availability of information, via campaigns, social media and include detail in other publications customers frequently use to outline availability of information, where it can be found and how often it will be published.</p>	<p>We consistently use data analytics to inform our processes and content.</p> <p>We report monthly on, for example, website hits, social media engagement and how our e-News is received.</p> <p>We believe there can be more consistency on info. to customers regarding where info. can be found / how often it will be published, and we will look to publish info. throughout 2023 more consistently.</p>	<p>Head of Customer Voice Cust. Comm. BP</p>	<p>Live/Ongoing</p>

	Customer Comments	Recommendation	Team Response – agreement / action	Lead	When
7	<p>Presenting information for all Information must work for all customers</p> <p>Most information has no meaning to individuals</p> <p>If it's boring nobody will read it</p> <p>Need the facts - not the waffle</p> <p>Be concise and visual I am more likely to take an interest in it</p>	<p>Ensure information is comprehensive, but not overly complicated, is relevant, jargon free, visual and easily understood.</p> <p>Graphics can be good to highlight challenging areas, using a mix of colour, charts and images to reflect their communities and videos or comic-strip illustrations to create fun and engaging detail.</p> <p>Use summaries to update customers and provide projections of improvement plans that tell a story.</p>	<p>We aim to present information in an easy to read and accessible format. We offer translation and accessibility options both on and offline and look to present information visually where possible or via video. This has increased dramatically over the past year and will continue to do so in 2023 with the hiring of another digital expert within the Communications Team.</p> <p>Something we are working on is getting more clear data and information regarding local improvement forward plans and once in place we will publish these across our platforms.</p>	Director of Comm.	Ongoing
8	<p>Listening and working together, value of the customer voice</p> <p>Light coloured text on a dark coloured background isn't clear</p> <p>Use columns to format text so sentence length is shorter and more digestible, large amounts of text can be difficult to read</p>	<p>Offer customers opportunity to comment on the presentation of the information to understand their views and ideas of how to improve engagement and accessibility.</p>	<p>In line with point 5 we have introduced this element but not fully established it.</p> <p>In 2023 it will be standard practice to provide engagement and feedback options in all publications and will do so clearly.</p> <p>With Engagement HQ also, this will add another dimension to how customers can engage and feedback with all services across Great Places.</p>	Head of Customer Voice	Ongoing