

Document Title	Customer Involvement Policy
Version	Final V1.3
Release Date	August 2017
Review Date	August 2020
Extension Reason(s)	
Extension date approved	
Approver details	Louise Oakley
Document Type	Policy
Sponsor	Louise Oakley
Author	Ivanna Roberts-Cillia



ORBIT

CUSTOMER INVOLVEMENT POLICY

Executive Summary	This document outlines Orbit's Customer Involvement Policy which aligns with the Voice of the Customer Policy but provides more detail on Orbit's co-regulation approach and how Orbit fulfils the requirements of the Tenancy Involvement and Empowerment consumer standard as defined by the Homes and Community Agency. It replaces the previous Customer Involvement Framework
Approved by	CSSMT as replacement for customer involvement framework and supporting voice of the customer policy
EA completed	An Equality Analysis (EA) was completed on 20 June 2017 and found to be a medium to low risk. This was because customer involvement is cross cutting and available for all customers who wish to become involved and offers a range of engagement methods.
Explain how customers have been involved.	Customers have been involved in the formulation of this policy by gathering insight through a digital discussion group, through workshops and continued consultation as the Policy developed
Consultation	Customers, Orbit Board and Performance and Policy team
Applies to	Staff responsible for delivery of customer involvement, all staff who assist in the delivery of customer involvement activities

SCOPE: This policy outlines the key principles in providing a customer involvement service offering opportunities to scrutinise, influence, shape and hold Orbit to account through a co-regulation approach, as outlined in the Homes and Communities Agency Tenant Involvement and Empowerment Standard and the Localism Act 2011.

1. INTRODUCTION

- 1.1 This Customer Involvement Policy sets out Orbit's commitment to engage, involve and empower customers to understand, evaluate and shape the services and products we provide to our customers and communities. As set out in Orbit's 2020 vision, our focus is to continually develop and improve as a customer-focused business, securing improvements in quality and efficiency outcomes. In providing opportunities for customers to be involved in our ongoing business development, we will work within the Homes and Community Agency's regulatory framework and ensure that the specific expectations of the Tenant Involvement and Empowerment standard are met.
- 1.2 This policy **defines** what we mean by 'customer involvement', and sets out the **purpose, principles and key roles and responsibilities** within Orbit for developing, delivering and harnessing the views of customers via a customer involvement programme.

2. DEFINITION

- 2.1 'Customer involvement' describes a range of mechanisms and opportunities for facilitated in-depth qualitative engagement and consultation with customers as part of service or product reviews, developments and evaluations. These can include (but are not limited to):
- Discussion groups – e.g. service improvement groups, or performance challenge team meetings
 - Targeted surveys – e.g. on policy change proposals, or communications developments
 - Inspections – e.g. on compliance with service standards, such as void properties or estate maintenance
 - Problem-solving activities – e.g. task and finish groups or customer insight panels.
- 2.2 These activities can take place via any channel – face to face or in person, online, or over the phone as appropriate. These typically involve groups of customers, supported by a facilitator, to debate, evaluate and suggest recommendations for the business to take forward.
- 2.3 Customer involvement activities are part of a broader 'voice of the customer approach', wherein other customer-related intelligence and data will be used by the business to inform strategic and operational discussions, plans and decisions. This other intelligence and data can also be used as part of customer involvement activities to inform the understanding and evaluation of issues being explored further by involved customers.

2.4 Involved customers come from various tenures across Orbit and engage at various levels in line with the regulatory framework with no hierarchy of importance.

3 PURPOSE

3.1 An effective customer involvement approach will ensure that not only will Orbit fulfil the expectations of the HCA's regulatory framework which requires that an effective co-regulation approach is in place, but also that, as a business, our decisions, plans, and ongoing improvements can be effectively informed and evaluated by customers. These can include (but are not limited to):

- service and product offer design, improvements and developments,
- policy and procedural changes,
- marketing and communication designs and approaches
- significant changes in management approaches
- business plan priorities.

3.2 Customer involvement activities provide the means to explore issues directly with customers, in greater detail. This looks at the nature of current experiences, and or proposals for change, with a view to making recommendations for future improvements for the benefit of the wider customer.

3.3 As is the nature of more qualitative approaches, customer involvement activities typically involve a smaller group of customers, with impacts and benefits for all affected customers being clearly considered debated and understood, as part of any discussions and subsequent recommendations.

4 PRINCIPLES

4.1 Orbit's approach to customer involvement needs to meet the needs of a commercially focused, agile business, whilst fulfilling the specific expectations of the HCA's Tenant Involvement and Empowerment Standard. In addition, good practice principles encapsulated in the Tenant Participation Advisory Service's (TPAS) tenant engagement standards will be adopted where appropriate. Orbit's approach will therefore be underpinned by the following principles:

4.2 **Setting the scope and purpose of customer involvement activities:**

- A range of involvement activities will be provided to ensure that customers have the opportunity to scrutinise performance, influence decisions, and shape recommendations for improvement.
- All involvement activities should have a clear business purpose – while involved customers will have the opportunity to select and define the focus of key activities in partnership with the business, as resources to support customer involvement are finite, the business reserves the right to ensure that the activity is relevant and appropriate to the priorities of the business
- An annual customer involvement programme (customer involvement offer) will be developed in consultation with customers, reflecting business and customer priorities, the availability of resources, local geographical needs where appropriate, and the effectiveness of different types of activities
- All involvement activities should be able to show a clear link back to the HCA standards – customers should be supported to understand any

particular expectations of the HCA standards as part of any review being undertaken, enabling the opportunity for challenge; involvement activities should be able to evidence how recommendations for improvement or change have taken account of the expectations of the HCA standards,.

4.3 The value and impact of customer involvement activities:

- All feedback captured as part of an involvement activity or series of involvement activities is valued – whether conducted face to face, online, or by post – no one type of activity is more important than any other.
- Customers will help to evaluate all customer involvement activities, including from a value for money, customer satisfaction and impact on the business perspective. Evaluations will be widely shared ensuring the transparency of outcomes
- Recommendations for improvement or change must be proportionate and evidenced-based; customers taking part in involvement activities will work for the benefit of all affected customers. The recommendations are not to benefit the involved customers taking part in a particular activity.
- We will identify ways in which to demonstrate the value and impact of involvement activities, (and encourage recruitment of new customers) including through timely and up to date reporting on successes and outcome to customers, staff, boards and other stakeholders. This will include an annual report to customers, as explicitly set out in the Tenant Involvement and Empowerment standard.

4.4 Inclusiveness and diversity

- The customer involvement programme will seek to capture a cross-section of views as part of any activity, ensuring that barriers to participation are minimised or eliminated where possible. Targeted involvement of specific groups of customers may be appropriate in some cases.
- Orbit will provide customers with timely information, in an accessible format, to support their engagement and understanding of a particular subject.
- Appropriate training and support will be provided to customers to enable them to engage effectively in involvement activities.
- The day to day delivery of the customer involvement programme will be supported by a code of conduct that staff and customers will sign up to, that embraces and respects diversity and inclusiveness as part of its approach.

5 ROLES AND RESPONSIBILITIES

5.1 Boards – The relevant board will review the customer involvement activities and ensure compliance with the Regulatory Framework is in place. Board Members will be encouraged to attend customer involvement activities.

5.2 Executive Team (ET) and Senior Management Teams (SMTs) – are responsible for ensuring that the impact and benefits to customers is clearly evidenced and considered as part of strategic and operational business plans, offers and performance monitoring.

5.3 Leadership Team Directors –are accountable for ensuring that direct and indirect customer voices are captured to inform the development of service developments that impact the wider customers. Customer involvement activities that link into these activities will be evidenced and shared with Leadership Team Directors.

5.4 All managers – are responsible for ensuring that they understand, seek out, and make use of customer insight to inform service improvements in their area. Customer Involvement Activities will support this. Managers are accountable for demonstrating to customers how their feedback and insights have been taken into account as part of review and improvement projects.

- 5.5 Specialist support for customer involvement is available to teams around the business. This includes:
- Performance Services team - for providing performance data for customers, Performance challenge team for example
 - Policy and Customer Involvement teams – for policy impact analysis and facilitated customer involvement and consultation activities. The customer involvement team will develop and deliver a range of customer involvement activities.
 - Equality and Diversity Consultant – for equality analysis support where required
 - Business Improvement – for customer experience mapping where required
 - Community Investment – for community engagement activities where required

6. EQUALITY AND DIVERSITY

6.1 Orbit policies are developed in line with our Equality and Diversity Policy. An Equality Analysis has been conducted and the details can be accessed on request.

7. CONFIDENTIALITY AND INFORMATION SHARING

7.1 We will only share information as outlined in our Data Protection Policy.

8. MONITORING AND ACCOUNTABILITY

8.1 Compliance with this policy will be monitored by both customers and the Customer Involvement team. Outcomes will be reviewed and the evidenced based approach will link into the formation of an annual Customer Involvement Offer. Performance in this area will be reported through the appropriate committees or boards as required.

9. REVIEW

9.1 We will carry out a fundamental review of this policy every three years or sooner subject to legal, regulatory changes or if internal changes require.