

# Customer influence policy

Policy details	
Version number	4
Issue date	13 <sup>th</sup> May 2022
Approved by	To be approved by the B3Living Board.
Ownership	
Lead directorate	Corporate Services
Policy owner	Head of Communications
Review	
Next review date	13 <sup>th</sup> May 2025
Review cycle	Triennial

## 1 | Introduction

This policy sets out how B3Living customers influence the way we work.

It outlines the arrangements we have in place to listen to our customers and respond to their views in a manner that is accountable and meaningful. We need this perspective to know we're living up to our social purpose as well as our commitments to excellent customer experience and value for money.

Understanding our customers' perspective helps us to achieve our goals, offer excellent customer experiences, and

This policy also explains how the customer voice is incorporated into our governance structures.

## 2 | Scope

This policy covers how B3Living enables our customers to hold us to account. It addresses the requirements of:

- ▶ The NHF Code of Governance 2020 in relation to Resident Focus, Accountability and Board Election, Selection and Appointment.
- ▶ Together with Tenants Charter commitments regarding relationships and communication, and voice and influence.

- ▶ The current Consumer Standard 2017 issued by the RSH (Tenant Engagement and Empowerment).
- ▶ The Social Housing White Paper including the proposed new consumer standards (Respectful and Helpful Engagement) and proposed new tenant satisfaction measures.

This policy applies to:

- ▶ All B3Living colleagues.
- ▶ All legal entities within the B3 Living Ltd Group or activities undertaken under trading names where there is a customer service function.

Not within the scope of this policy:

- ▶ This policy does not cover the full definition of customer engagement, which may encompass a wider range of relationship-building activities (such as newsletters, community events, social media content, noticeboards).
- ▶ Our complaints handling procedure, which is outlined in our Customer Feedback Policy.

## Definitions

“Customers” refers to all current and potential tenants, shared owners, and leaseholders of properties owned or managed by B3Living. This definition includes garages but excludes commercial leases.

“Customer influence” – is a continuous two-way conversation between customers and B3Living on topics that matter to them, where they can hold us to account. This has a broad definition which includes:

- ▶ “Feedback” – refers to activities that collect our customers’ views on our existing services based on recent transactions with us or past experiences. This includes feedback gathered through formal processes, usually initiated by B3Living, and informal feedback picked up in the course of other activities. Typically, an individual participates on a one-off or ad hoc basis.
- ▶ “Input” – indicates activities that seek to understand our customers’ view on potential ways of delivering our services. This includes ideas for improvements developed in partnership with customers (i.e., co-design and co-production). Generally, these involve customers subscribing to ongoing participation (at the level of their choice), through which we build a working relationship with them.
- ▶ Consultation or participation work that builds a deeper understanding of the social housing lived experience. Examples may be partnership work with other housing associations or national customer networks.

“Customer voice” refers to the collective feelings of wishes expressed by our customers. This is a holistic assessment that considers all customer influence work.

“Subscribed customers” refers to current B3Living customers who have signed up to give B3Living their input on an ongoing basis.

“Customer Community” is our network of subscribed customers.

## 3 | Aims and objectives

### 3.1 Policy statement and aims

- 3.1.1 Listening and responding to our customers is essential to our success as a social business. We aim to work in partnership with customers, engaging them to challenge, develop and improve our services.
- 3.1.2 We need a continuous two-way dialogue with our customers that is broad, live, and deep. We recognise that our customers are diverse, may have intersectional needs, and will not all want to be involved to the same degree. It is important that we take a multi-channel approach and offer a variety of avenues to influence our decision making.
- 3.1.3 B3Living aims to promote the customer voice at all levels within the organisation, including at Board. This policy encourages a positive culture in which all colleagues recognise and embrace role of customer influence when looking to deliver excellent customer experiences.
- 3.1.4 We aim to ensure that we practice good governance and meet the requirements of the NHF Code of Governance 2020 and the Together with Tenants Charter.

### 3.2 How we listen to our customers

- 3.2.1 We have a clear Customer Influence Framework attached in Appendix A. This Framework helps B3Living to build a representative picture of our customers' opinions, concerns, and suggestions for improvement. It also sets out the mechanisms that we have to ensure the customer voice is heard at all levels in the organisation and used to guide our strategic decision making.
- 3.2.2 Our understanding of the customer voice must be inclusive and broad. B3Living's Customer Influence Framework is designed to remove barriers to engagement and offer a range of meaningful opportunities.
- 3.2.3 B3Living must always consider the impact of our work on our customer, and we aim to do “with”, rather than do “to”. We invite customer input into any activities where a substantial, tangible impact will be felt in customers' lives. Examples include:
  - Rent setting
  - Contractor appointments (ongoing, global contracts)
  - Customer and building safety measures

- Service standards (performance against them, reviewing or setting new standards)

Although it is impossible to outline every scenario in which we will seek our customers' input, our approach is to consider seeking customer participation in strategic decisions, unless we can justify why it would be impractical or inappropriate to do so. Appendix C offers a steer on which issues matter most to our customers.

3.2.4 We proactively seek regular, live feedback on our core services.

3.2.5 When we invite customer input, we are clear about our legal or regulatory responsibilities and how this affects their scope to influence our actions.

3.2.6 We support the formation of residents' associations where they are autonomous and led by customers, for customers. Our role is not to steer or facilitate, but we will help customers to set up residents' associations and are happy to participate at our customers' request. However, due to limited capacity we cannot commit to attend every meeting. .

### 3.3 Making sure we listen effectively

3.3.1 We make sure listening is embedded into our processes by:

- Having an overarching Customer Strategy, which includes provisions for customer engagement, which is reviewed by Board every three years. A summary of the latest version is available on our website.
- Reporting on customer voice considerations in all B3Living Board papers.
- Reporting customer feedback to our Customer Experience working group.
- Reviewing customer input opportunities in annual planning processes.

3.3.2 We train our colleagues to make sure they understand how they can promote the customer voice in their role. At the same time, we raise awareness internally and externally about the value of customer influence.

3.3.3 It is important that customers feel that they have enough opportunities to influence B3Living's work and that these are accessible. To monitor whether we are meeting these expectations:

- Our Board and customers review our Customer Influence Framework and this policy every three years to make sure our customer voice mechanisms stay relevant, effective, and meaningful.
- We seek feedback from our customer base more widely on how we engage and involve them. We do this every three years.
- Our colleagues independently network to gather best practice on resident engagement and increase their awareness of the wider housing sector challenges. We also support our subscribed customers to network and learn and promote opportunities to them.

### 3.4 Accessibility

- 3.4.1 All B3Living customers, regardless of tenure or protected characteristics (age, race, sex, sexual orientation, gender reassignment, marital status, pregnancy or maternity, beliefs, disabilities) can access opportunities to independently scrutinise our work. We provide options for anonymous feedback.
- 3.4.2 We keep our customers informed and promote customer influence opportunities regularly:
- Our website and other communication materials will include information on how to get involved and on our activities. These also include routes for customers to request more information in order to hold us to account.
  - All colleagues understand their role in promoting our customer input opportunities.
- 3.4.3 As much as possible, customer input should be accessible without formal training. But subscribed customers are also offered timely advice or signposted to relevant training, where needed and appropriate.
- 3.4.4 We aim to offer offline as well as digital input options (e.g. focus groups in person and via webinar), either in the first instance or on request. As far as is practical, we should offer inclusive ways to engage, tailored to the needs of the individual. This may include arranging opportunities in the evenings or weekends.
- 3.4.5 We recognise that some customers have limited time or capacity to give feedback or input into activities. Our Customer Influence Framework includes 'light touch' channels and opportunities with no ongoing commitment.
- 3.4.6 Access to our customer input forums is only denied to customers who fall under our Persistent Complainants Policy or who have breached the terms of reference / community guidelines for that channel.

## 3.5 Responding to the customer voice

- 3.5.1 We have robust processes to make sure the customer voice influences the ways we deliver our services. These include, but are not limited to:
- Service Improvement Plan driven by the customer voice
  - Six-weekly Customer Experience working group
  - Customer Ethos Champions
  - B3Living internal communications
  - Training

We may respond to customer input or feedback at the individual, local, or global level, depending on its nature. Our Customer Influence Framework (Appendix A) sets out how we respond at the strategic level.

- 3.5.2 We share the customer voice faithfully, for example, by using quantitative analysis or representative verbatim quotes.

- 3.5.3 Any outcomes agreed based on customer feedback are actioned by the relevant teams.
- 3.5.4 Our response to localised customer influence (i.e., feedback/input related to a single estate or location) is targeted at those affected. Therefore, this may fall outside our strategic response but will follow the spirit of this policy regarding transparency and accountability.
- 3.5.5 Our process for responding to feedback at an individual level is recorded in our Customer Feedback Policy. However, this feedback is also monitored through our Customer Influence Framework and incorporated into our strategic response to the customer voice.

## **3.6 Governance**

- 3.6.1 The role of customer influence in our governance structures is clearly set out in Appendix B to this policy.
- 3.6.2 Our Board is keen to hear the customer voice in the round. They review a Customer Experience report quarterly which collates all recent feedback and input from our customers. Board members also have regular opportunities to hear from our subscribed customers directly through a publicised calendar of focus groups/events and a joint annual review meeting.
- 3.6.3 Where applicable, decision making at our Board is influenced by the customer voice, which is referenced in all board papers and proposals.
- 3.6.4 We strive to recruit people with lived experience of social housing to our Board. Vacancies are open to B3Living customers, subject to a fair, transparent and accessible recruitment process. We advertise widely, including to our customers.

## **3.7 Being accountable and building trust**

- 3.7.1 Openness is one of B3Living's core values. We are committed to being transparent about our decision making and activities, and where customers can/have influenced these. Appendix A sets out how we 'close the loop' on our customer influence activities.
- 3.7.2 Where we have sought customer input via our Customer Community, we will report back to the those involved directly to confirm any decisions and outcomes.
- 3.7.3 We publish information on our activities and performance to keep our customers informed and help them to hold us to account. This includes information on complaints, finances, regulatory framework, board decisions impacting our customers, satisfaction measures, customer influence activities, and equality, diversity, and inclusion. This information is available via:

- B3living main website.
- Customer annual report.
- Financial statements.
- Monthly e-newsletter.

3.7.4 We regularly report back to our wider customer base and colleagues on our customer influence activities. These reports are accessible and transparent, outlining the feedback/input we received from our customers, the outcomes or decisions made, and how we plan to respond.

## 4 | Equality, diversity, and inclusion

An Equality Impact Assessment (Part 1) has been completed. Due to the nature of this work, there is the potential to privilege some groups over others, but the policy includes appropriate mitigations to ensure we listen to a diverse sample of customers.

## 5 | Data protection and information security

Gathering customer feedback and input involves the processing of our customers' personal data. A Data Processing Impact Assessment has been completed and the residual risk level is low.

## 6 | Customer voice

As part of the approval process for this policy and its review we consult with our customers via focus group, telephone interviews, a survey, and a digital poll. Their input will be made available and transparent through our customer newsletter and website.

Customers were consulted in the drafting of this policy in February 2022. Customer views from three focus groups, telephone interviews, and an online survey (shared via email and Facebook) have been factored into this policy. Broadly, customers expressed concerns around accessibility and diversity, agreeing that a range of options should be available to influence decisions and that B3Living could do more to promote opportunities and make our materials easy to understand.

They felt it was important that B3Living remains proactive, continuously checking in on the performance of our services and reaching out to customers "where they are". Trust and accountability were common concerns: customers wanted assurance that any views they express will be considered, responded to and visible at leadership levels.

In Q3 2019-20, a sample of 250 customers were surveyed. Their feedback was that they wanted to be better informed of opportunities to be involved in governance and scrutiny with B3Living.

## 7 | Compliance

Housing Act 1985.

Equality Act 2010.

The NHF Code of Governance 2020 provisions related to “Resident Focus”, “Accountability”, and “Functions of the Board”.

Tenant Engagement and Empowerment Standard 2017 issued by the Regulator of Social Housing.

The charter for social housing residents: social housing white paper

NHF “Together with Tenants” Charter.

## 8 | Linked policies, procedures and guidance

Internal:

- Customer Feedback Policy
- Equality, Diversity, and Inclusion Policy
- Customer Strategy
- Communications Strategy
- Customer Community Terms of Reference

External:

- NHF Code of Governance 2020
- Tenant Engagement and Empowerment Consumer Standard 2017 issued by the RSH
- The Housing Green Paper “A New Deal for Social Housing”
- NHF “Together with Tenants” Charter

## 9 | Responsibilities

Head of Communications

- ▶ Overall responsibility for this policy, including initiating its review every three years as set out in section 3.3.2.

Customer Insights Manager



- ▶ Overseeing the delivery of our Customer Influence Framework on a day-to-day basis.
- ▶ Managing relationships with our subscribed customers.
- ▶ Analysing trends in the customer voice and sharing this within the organisation.
- ▶ Ensuring that B3Living reports back to colleagues and customers on the decisions and actions taken based on the customer voice.

## All B3Living colleagues

- ▶ Recording customer feedback in the appropriate format.
- ▶ Facilitating formal feedback or customer input activities as and when required.
- ▶ Promoting opportunities to our customers.
- ▶ Identifying decisions in their area which require customer input. Working with the Customer Insight Manager to arrange consultations, surveys, etc to gather this input.

## B3Living Board

- ▶ Monitoring compliance with this policy, including that the “Customer Voice” is heard in strategic decision making
- ▶ Engaging with our subscribed customers periodically to improve their understanding of the customer voice.
- ▶ Review and approval of this policy and framework triennially.

## Company Secretary / Assistant Company Secretary

- ▶ Recruiting Board members with lived experience of social housing.

## 10 | Performance monitoring

The performance of our customer influence activities is monitored quarterly and reported to Board within our key performance indicators and Customer Experience report.

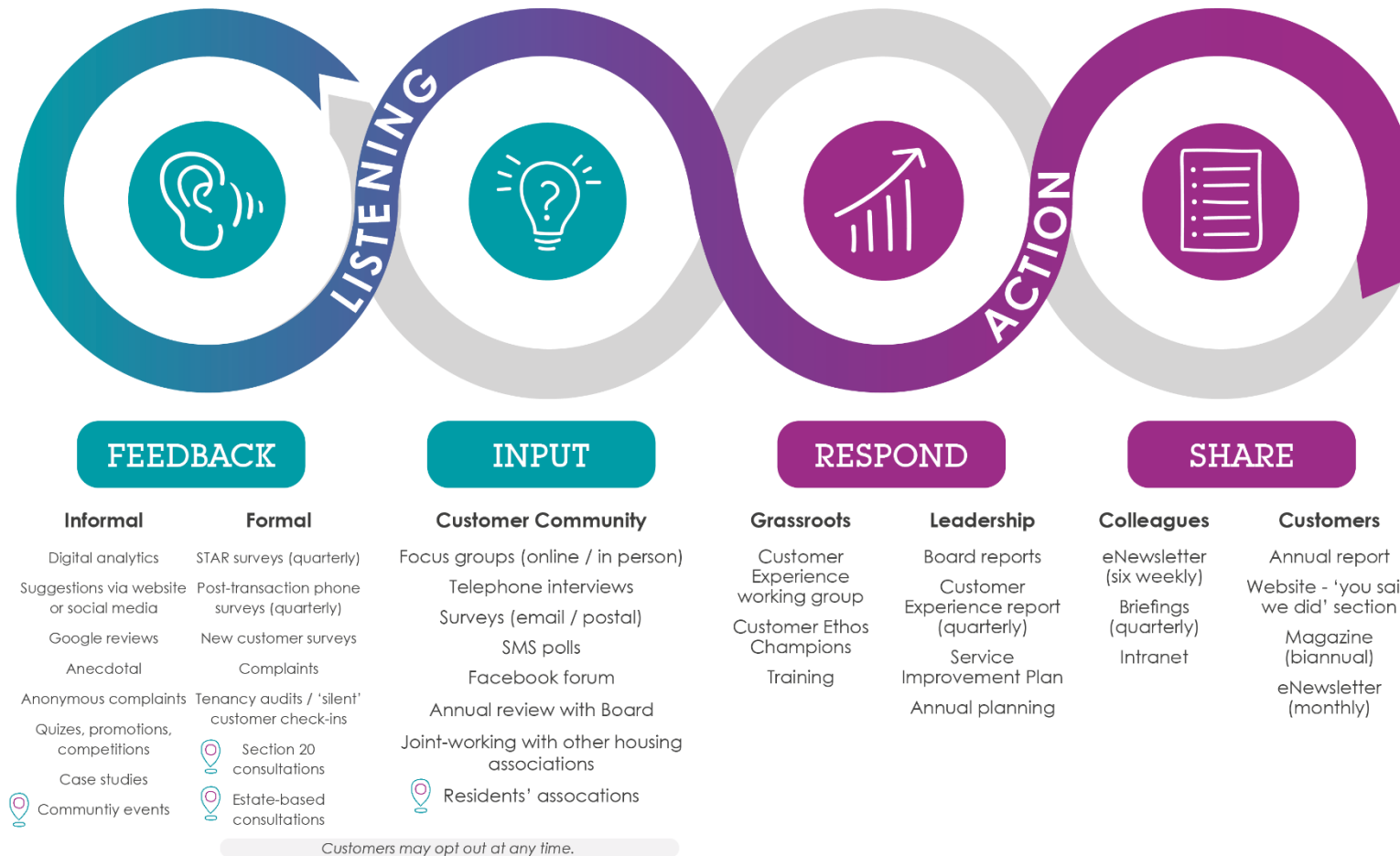
We monitor if we are listening effectively through:

- Quarterly perception survey (STAR). Our metric for 'listening and acting on customer views' is reported to our colleagues and Board in our strategic key performance indicators.
- An annual report to our Board on the headcount and demographic profile of our subscribed customers, complainants, and feedback survey respondents compared with the profile of our wider customer base. We set targets to increase participation in under-represented groups.

## Summary of changes

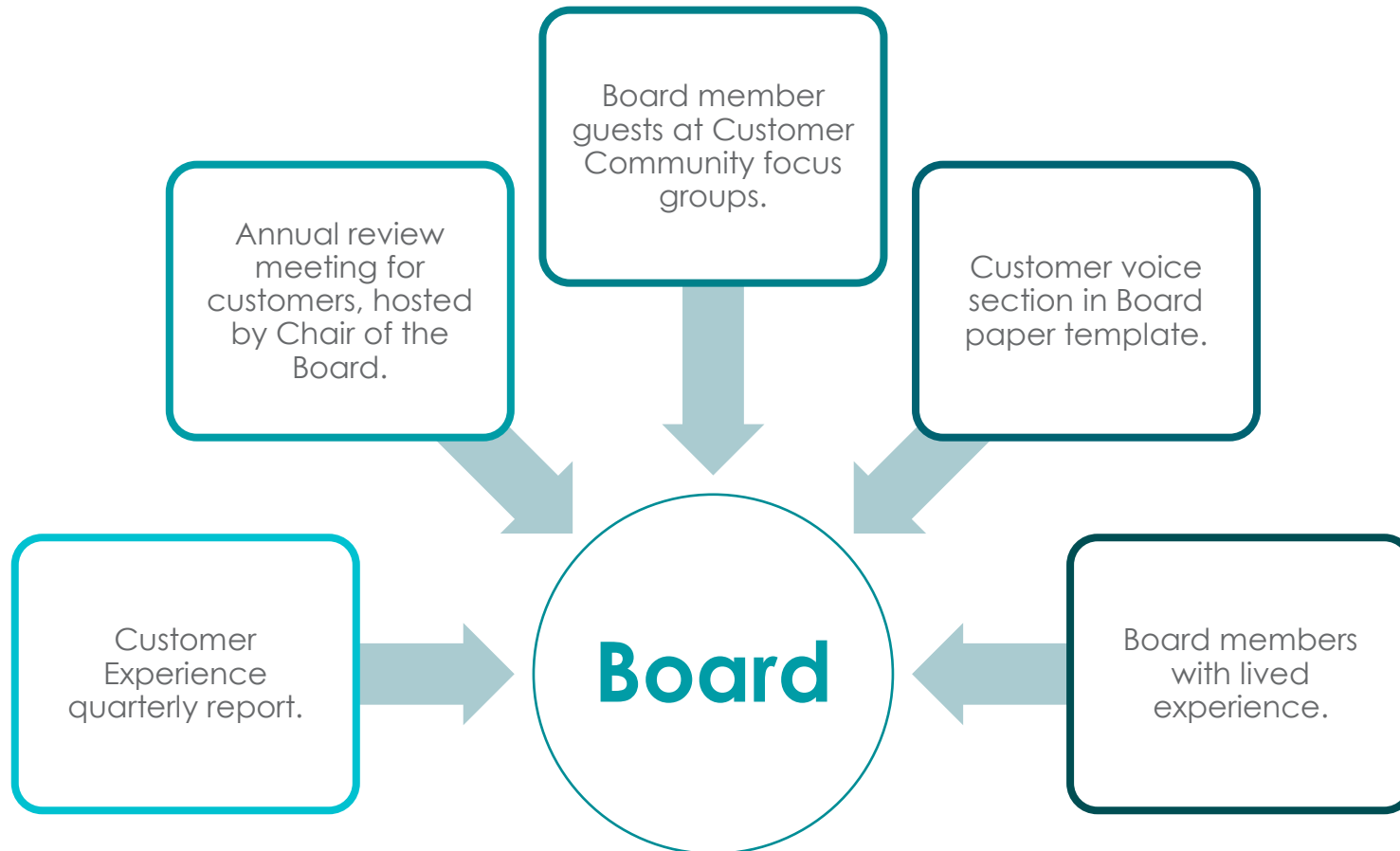
What changed?	When?	By whom?
Policy renamed from 'Resident involvement policy' and rewritten	[13 /05 / 2022]	Becky Geoghegan, Head of Communications

# Appendix A: Customer influence framework



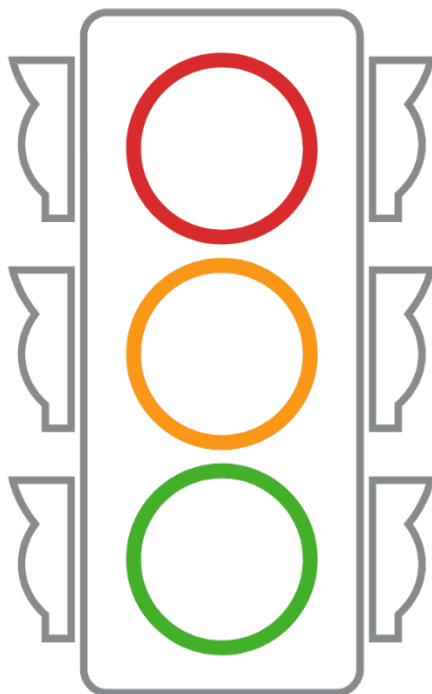
Localised customer influence

## Appendix B: Customer influence in governance



## Appendix C: What matters to our customers

We asked our customers to give us feedback on which topics interest them. The table below gives a flavour for the decisions that customers preferred B3Living to manage (due to a lack of interest or expertise) and those where they felt customer input would be important.



### LOW INTEREST

- Policies
- Performance
- Strategies

### CONSIDER SEEKING INPUT

- Contractor selection
- Staff behaviours / HR initiatives
- Complaints procedures
- Adaptations policies
- Health and safety
- Technology and smart homes

### HIGH VALUE TO CUSTOMERS

- Rent changes
- Sustainability initiatives
- Neighbourhood investments (CCTV, parks, trees, etc)
- Specs for new homes / voids
- Support for people with vulnerabilities
- Customer service standards
- Kitchen / bathroom renewals