

Stronger Voices, Stronger Communities

Customer Engagement Framework

April 2024

wheatley-group.com



Stronger Voices



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| | |
|---------------------------------|----------------------|
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| Customer engagement required | Yes |
| Trade union engagement required | Yes – For info |
| Equality Impact Assessment | Yes |



Our vision is to support our customers to reach their potential. Our strategy for making this real will deliver an unprecedented shift in the balance of power and control towards our customers, empowering them to make their own choices about the services they want.

The development of our approach has been informed by feedback from our customers and by the research project carried out for us by The Democratic Society “Democracy Starts at Home”. We want to challenge ourselves in our approach to engagement – to create that unprecedented shift in power to the customer. Our 2021-26 strategy Your Home, Your Future, Your Community emphasises co-creation with our customers and promoting their ability to be in control and self-direct their services. By 2026 our customers will be empowered to make their own choices about the services they want, be properly equipped to do things for themselves and be involved in the design of products and services from start to finish.

This shows how a Wheatley customer will experience our engagement with them in 2026.

I feel in control and have choices

- I take charge of my life, I self-direct my services.
- I have access to training, life skills, employability and support.
- I see a brighter future for myself and my family.

I shape the services I receive

- I influence the things that matter to me.
- I can give instant feedback.
- I understand performance from both a customer and business perspective.
- I can get involved through crowdsourcing ideas, designing, voting, on/offline discussions.

I have access to the information I need

- Online access provides me with all info about my home and community at my fingertips – account, costs, maintenance history, investment plans, etc.

Each customer is an individual who will want and/or need different levels of engagement to feel this experience. Our engagement approach is designed to support customers' choices for the experience they want. The emphasis will not be on expecting customers to form constituted groups, meeting in specified locations at set times. Instead, the approach will be to encourage **accessibility** – anyone can volunteer for an activity without further commitment – and **flexibility** – people can express views at a time and in a way that suits - online, 24/7, from home, or in person.



By making our engagement options more flexible for customers we seek to improve the opportunities for engagement which are available to our customers and widen the diversity of customers who are actively involved in shaping services. We will support our customers and communities to feel more in control of their personal and collective well-being, inspired to raise their aspirations and able to realise their potential.



The Framework

The engagement framework consists of four pillars which support our engagement with customers, as illustrated in Figure 1 below.

Figure 1 – The Stronger Voices framework

| | |
|---|--|
| We listen You are heard | <ul style="list-style-type: none">• You tell us if we are doing well or if we are getting it wrong |
| We consult and co-create You influence and design with us | <ul style="list-style-type: none">• You help us improve services• You work with us to design new services or products |
| We give power to... You decide | <ul style="list-style-type: none">• You direct spending and resources• You set policy priorities |
| We support Your voice is stronger and people listen to you | <ul style="list-style-type: none">• We help you to build capacity in your communities |

1. We listen. You are heard

Processes

This is a very open form of engagement which we would expect all customers can and will access at some point in their relationship with us. It enables customers to put forward ideas which are not driven by our agenda. Currently, we engage with customers under this pillar in a variety of ways. Our **Think Yes** culture means that any staff member engaging with a customer listens and responds to what the customer is saying to find a positive solution.

Customer conversations carried out by housing officers are an example of this – where the customer can bring up anything which is important to them, and the housing officer listens to understand what our role might be and how we can help.

Often this is about opening service options for customers, but it might also be about supplying information or developing insight which will help for example to create a community project or influence a service change.

Social media can also be used by customers to express what

is on their minds rather than responding to any focused question we have asked.

Voice of the customer is the process we use to identify online feedback on various service areas or topics. This type of process will become increasingly important to customers as online self-service increases.

Community groups/meetings are another way in which customers can raise issues which matter to them, for example, a staff member might attend a community meeting where the main topic of conversation is the lack of public transport. While we do not have a direct role in this it helps us to build community insight and we may be able to help influence other community partners or support grant funding applications.

Learning from complaints analysis is also an important way in which we listen to what our customers are saying and change the way we deliver our services as a result of their feedback.



Key roles

Our main job roles who engage with customers in this way are our front-line staff

- Housing officers
- Stronger voices officers
- Foundation team
- Care workers and managers
- Customer First Centre staff
- Lettings advisors
- Repairs and investment staff
- Neighbourhood Environmental Teams
- Locality housing directors/heads of housing

Outcomes

The main purpose of this pillar of engagement is to provide solutions to our customers for the issues they raise. This is a cornerstone of our Think Yes culture.

The outcomes are increased customer satisfaction; faster complaints resolution; lower levels of waste demand, better customer relationships.

Another outcome is the ideas and innovation that customers can bring to our business. Insight gathered through this form of engagement is collected and structured through the locality planning process, complaints analysis and survey feedback.

2. We consult and co-create. You influence and design with us

Processes

As part of this pillar we currently use a number of consultative processes. These include **rent consultation** or other **policy proposals, project proposals, surveys** ranging from small/local, service-specific e.g. repairs, to wide-ranging such as our annual customer satisfaction surveys. **Focus groups** are a method we also use to seek more qualitative responses which can still be used to provide structured and representative views.

We work alongside any **Registered Tenants Organisations (RTOs)** to improve local communities. Our stronger voices officers and housing officers can also support the establishment of RTOs.

Our **Group scrutiny panel** is another way customers can get involved. 'Scrutiny' is all about reviewing performance, through a partnership approach, and working with officers to identify

improvements for services.

These are important processes, but our ambition is to support more opportunities for customers to become proactively involved in working with us to design services. We believe some customers will find this very rewarding although we recognise it will not appeal to all customers as it requires a greater degree of time and effort. So, the key processes focus on design – service design; estate design; system design; and home design.

We have introduced the concept of **Customer Voices**. These are customers who will work alongside officers to inspect, advise on and design how we deliver services and projects. We have designed an annual programme for our Customer Voices which will be informed by our Group strategic delivery plan so the customer voice is at the heart of our strategic projects. The programme is designed to continually strengthen the

voice of the customer.

One of the activities our customer voices are involved in is **customer journey mapping**. When we explored this as a concept with our customers during our International Conference on Engagement it was one of the most popular activities with our customers and brings huge insight as to how our processes and systems can be improved to deliver a better customer experience.

We have introduced **My Voice**, a digital tool that enables us to gain instant feedback on a particular service. We have also introduced **Book it, Track it, Rate it**, as a direct result of customer feedback on repairs. It enables our customers to book a repair, track a repairs operative and give feedback on the repair.

On a more individual basis, our health and wellbeing assistants work with individual care customers using an **outcome star method** which supports



the people we work for to identify the aspects of their life they want to improve and how to go about it.

Key roles

Our main job roles who engage with customers in this way are those with a responsibility for service and strategy development:

- Community of Excellence leads
- Business leads
- Investment managers
- Development managers
- Project officers
- Service improvement staff
- Stronger voices officers

Outcomes

The main purpose of this pillar of engagement is to test and consult on proposals; identify what doesn't work in current processes or policies; co-design new services or products; and challenge our collective thinking to improve. The outcomes are increased customer satisfaction; fewer complaints; lower levels of waste demand; and better value for money as resources are deployed in accordance with customer priorities.

Ensuring that the customer's voice is heard and enabling co-design as an early milestone in our strategic projects will deliver innovation and fresh thinking in our delivery. Customer-focused design has always been important to us, but the process of co-creating with customers in the design process is a new part of our approach.



3. We give power to... You decide

Processes

The processes for this pillar focus on ways in which we can safely empower our customers to make decisions on their own homes and environments and to make decisions on priorities and resources. Our development of online, self-service tools helps to promote this for the individual customer - for example, they can decide and track when and where they want a repair carried out; and use a budget calculator to decide whether they can afford their own tenancy. The Livingwell model for older people uses supportive technology to give people more control and independence in their homes and communities.

You Choose Challenge will be one of the key methods we use to engage customers to make collective decisions about priorities and resources. You Choose Challenge should be deployed in new-build communities. This method is illustrated in Figure 2.

You Choose Challenge is linked to our Greener Homes, Greener Lives Sustainability Framework, and projects should be focused on making communities greener and more sustainable. However, You Choose Challenges should be driven by local need and choice.

You choose challenge

Figure 2 – You Choose Challenge

| | |
|----------------|---|
| Connect | Crowsource ideas <ul style="list-style-type: none">• Open collection of ideas on a particular challenge• Methods are both digital and offline• Marketing campaign - use leaflets, newsletters and contact and visit customers individually |
| Create | Develop options <ul style="list-style-type: none">• Work with a group of customers to create options• Customers drawn from Customer Voices and other recruitment options• Lead staff should be Business Leads or RSLs - supported by SVOs for project delivery |
| Choose | Customer vote <ul style="list-style-type: none">• Three options should be created and put to customer base• Voting should be via phone call, post or online• There should be big publicity on the outcome of the vote |





Key roles

The key staff roles involved in this pillar will mainly be those which carry budget responsibility and decision-making power as this power will need to be appropriately devolved. However, frontline staff will assist in delivering projects.

- Executive team
- Director of finance
- Managing directors
- All directors
- Housing officers
- Stronger voices officers
- Foundation team
- Development team

Outcomes

The main purpose of this pillar of engagement is to empower customers to make decisions and choices about what matters to them. Our customers and communities will feel more in control of their personal and collective well-being, inspired to raise their aspirations and able to realise their potential. Self-directed services, innovative approaches such as outcome star, Livingwell for older people and Housing First help build the trust, confidence and ability of individuals to make the changes that are important to them, giving people more power and control over their lives and their futures.

The outcomes are increased ideas and innovation; increased customer satisfaction; fewer complaints; more customers feeling involved in decision-making; and better value for money as resources are deployed in accordance with customer priorities.

4. We support. Your voice is stronger and people listen to you

Processes

The processes for this pillar focus on ways in which we can support people to develop their potential and raise aspirations. We have experience of using many of these processes already, especially within Wheatley Care and other support services provided throughout the Group. Encouraging volunteering, as in the Livingwell service; encouraging individual expression through music and art; and supporting youth development projects are all ways that we currently support people to develop their potential.

The support provided through the Wheatley Foundation to access employment, training opportunities and bursaries is another method by which we support capacity development. This Engagement Framework provides an opportunity to integrate this support and develop it further through wider engagement opportunities. We will provide a learning suite and potential accreditations for those customers who become Customer Voices, helping them to develop their skills to assess information,

challenge approaches and express their views. This will form one of the pathways for customers who may be interested in positions as Board members.

Key roles

Our main job roles who will support customers to develop their potential are:

- Stronger voices officers
- Care and support staff
- Health and wellbeing assistants
- Wheatley Foundation officers
- Academy staff

Outcomes

The main purpose of this pillar of engagement is to support people to develop their potential and build capacity and resilience in our communities.

Digital engagement

The Engagement Framework is based on a blended approach which understands the value of face-to-face interaction but also the opportunities that can come through digital methods of engagement. We have significantly developed our digital approach, and continue to work with our customers to develop other additional tools that are conducive to engagement. Figure 3 illustrates how these tools support the four pillars of the Engagement Framework.



Figure 3 – Digital tools to support engagement

| We listen | We Co-create | We give power | We support |
|---|---|--|--|
| <ul style="list-style-type: none"> • My Voice feedback surveys • Book it, Track it, Rate it • Social media • Web self-service, where customers can log complaints | <ul style="list-style-type: none"> • Digital Customer Voice Panels and focus groups via zoom or MS teams | <ul style="list-style-type: none"> • Digital feedback tools, like Menti (for decisions on You Choose Challenge) | <ul style="list-style-type: none"> • My Academy for Customer Voices |

Digital engagement can replace or supplement off-line community activity such as a meeting to discuss investment in a block. This should enable a wider range of input by increasing the methods by which people can take part in sharing information and views; building community consensus; and reaching decisions.

Importantly, we will ensure that digital engagement is used to increase the range of customers who are able to participate. We will support customers to engage online but we will also ensure that no one is excluded from involvement because they are unable to participate in this way.

Other digital methods which we will develop include the **integration of feedback within the customer service journey.**

The opportunity to provide feedback will be available at

different points in the service journey – for example to provide feedback online through text, web or app feedback after ordering a repair; then again after receiving the repair. This can also be developed for example to contact a customer after they have completed their first year of tenancy with us, to seek feedback on their experience.

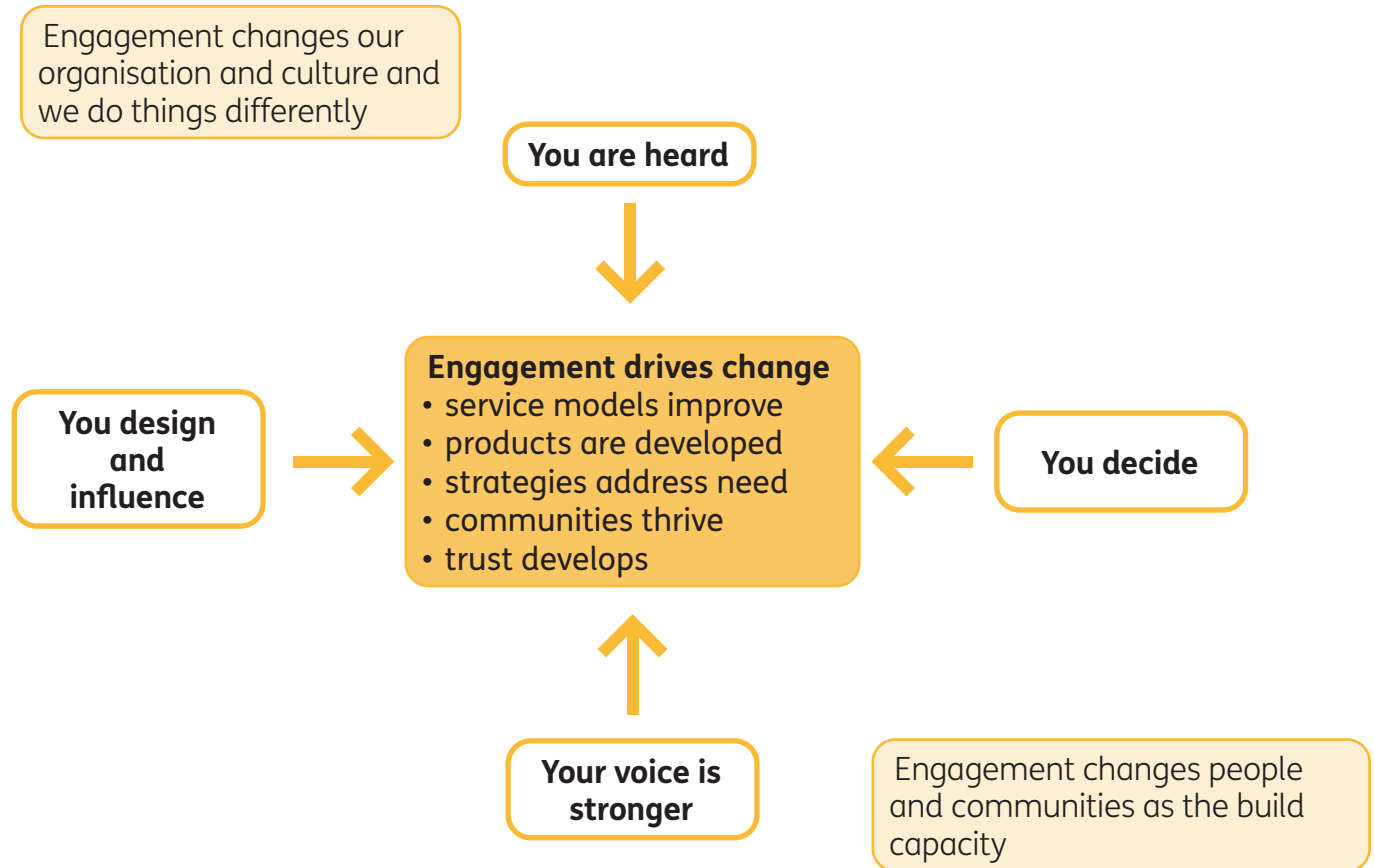
Staff resources

Every member of staff in the Group has a role in promoting engagement and responding to the customer voice in all our activities. The stronger voices team will support business leads to ensure this happens and will oversee the annual engagement programme which supports the customer voice throughout our strategic activities.



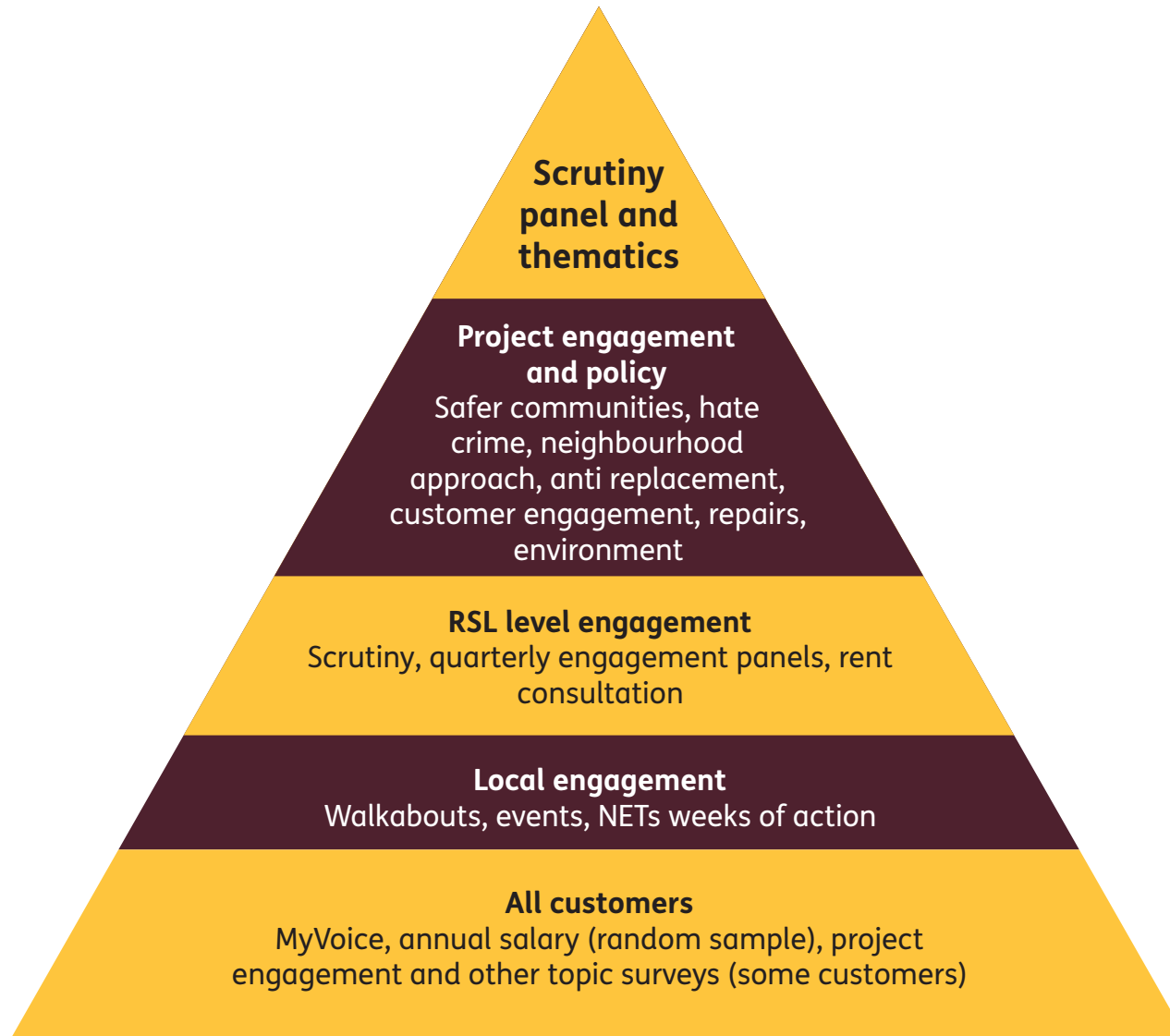
Framework outcomes

This Engagement Framework is designed to support our ambition to promote a culture which places the customer voice at the heart of everything we do. Through our strategy Your Home, Your Future, Your Community, we have set out to challenge ourselves in our approach to engagement – to create that unprecedented shift in power to the customer. Our 2021-26 strategy emphasises co-creation with our customers and promoting their ability to be in control and self-direct their services. By 2026 we hope that our customers will be empowered to make their own choices about the services they want, be properly equipped to do things for themselves and involved in the design of products and services from start to finish. Through this journey with our customers, we hope that our communities will become stronger; more resilient; and able to make their voices and their expectations heard more widely.



Key performance indicators

- Overall customer satisfaction above 90%
- Over 90% of Care customers satisfied with the overall service
- Overall satisfaction amongst households with children improved to 90%
- 90% of customers feel they can participate in the landlord's decision-making
- 95% of customers actively engaged in shaping services feel they participate in decision-making
- 50% of strategic delivery plan projects include customer engagement as an early milestone
- Maintain 1550 customer voices
- Each RSL to deliver three Customer Voice panel events per year
- All customer-facing strategic projects will include customer engagement





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