

CUSTOMER INVOLVEMENT IMPACT ASSESSMENT

MAY 2010 - SEPTEMBER 2011



Foreword

Tarka Tenant Panel Chair, Julia Bowden



Introduction

At Tarka we believe that it is important that our customers know what kind of difference (impact) they are making to how we provide services. Although the Tenant Services Authority (TSA) no longer requires housing associations to do an impact assessment, at Tarka we believe it is good practice to have one.

Many changes have taken place over the past year, including the ways in which customers can be involved in working with Tarka. The first and most obvious change is that although we still refer to tenants and residents, we regard everyone that we provide a service to as customers. This includes shared owners and leaseholders as well.

What is an impact assessment?

An impact assessment measures customer involvement activities and brings out the differences that those activities have made to our services. In particular, this impact assessment looks at where our customers and staff have worked together. The activity itself is called an **output**. The actual difference resulting from that activity is called an **outcome**, and we want you to know how much work has been going on and what has been achieved as a result.

Who is it for?

Customers – it tells you what has changed because you have been involved.

Tarka and Westward Housing – it shows how customer involvement benefits the business.

Tenants Services Authority – it shows we are utilising best practice and complying with co-regulation.

Stakeholders and partners – it illustrates the value of a customer focused approach to partnership working and continuous improvement.

Why have customer involvement at Tarka?

We believe that it is important to take into account our customers views to help run the business. We want to have customer involvement at the heart of all we do to provide services. There are three main reasons why we believe this:

1. There is a strong business case for good customer involvement – it drives accountability, continuous improvement and empowers tenants to make a difference. Customers help us to improve how we do things.
2. Co-regulation (partnership) is a regulatory requirement and is the favoured model of the regulator (TSA). It means working together to achieve success.
3. It's what our customers want.



The diagram above shows how customer involvement drives **accountability, improved services** and gives customers a **real voice**. Customers can share in the responsibility for decisions that have an effect on their future, ensure that improvement plans work and make recommendations that are listened to – **empowerment**.

Value for money

Value for money is about getting the best from what you have in relation to time and costs. It is also about added value, so it does not always mean going for the cheapest option.

Outcome based model and impact

The material that goes into this impact assessment comes from a variety of sources and includes financial, performance and statistical information. This in turn comes from the work that we do. We gather this data as a result of working in a particular way.

When planning any customer involvement project or event, Tarka carefully considers what it wants to achieve (outcomes), what that will involve (output) and associated costs and resources (input). To help involve our customers we provide a clear structure of agreed aims and objectives that help to keep us on track, monitor performance and evaluate achievements. We call this our outcome based model.

This enables us to see at a glance if we are on target, achieving appropriate outcomes and helps us evaluate our performance and make improvements to how we do things.



Equality and diversity

All Tarka staff, Board members and Tenant Panel members have received Equality and Diversity training. This will be ongoing. Tarka is represented on the Westward Housing Group Equality and Access Group.

There is work still to be done in this area to meet the Equality Act 2010. However, we collect customer profile information which, as well as meeting communication needs, will help us identify under represented sectors of our community. These include young people, working families and others who might wish to be involved.

How customers are involved

“Tarka Housing aims to involve our customers in all aspects and levels of Tarka business in a way that is customer and outcome focussed, and promotes greater accountability, transparency and value for money.” **Customer Involvement Agreement, 2010**

At Tarka we have a **partnership approach** to customer involvement, with staff and customers working together. We move forward, based on agreement, and regular updates are provided to our customers at all stages for all involvement activities.

Our customers also feed back and tell us how satisfied they are with each piece of work, whether lessons could be learned and agree future plans. The foundation for this way of working is contained in our Customer Involvement Agreement, which was drafted by customers and staff and approved by the Tenant Panel and Tarka Board.



Starting point

In order to provide an accurate measurement of progress, it is useful to have a starting point from which we can judge how far we have come. From a customer involvement point of view, Tarka's journey started from its transfer from Torridge District Council. However, since this impact assessment only concerns the period from May 2010 to September 2011, our starting point will be from the last Customer Involvement Assessment in November 2009.



2009 Assessment report

This review carried out a critical assessment of nine specific areas, as set out in the Audit Commission’s Key Lines of Enquiry:

- Access and customer care
- Equality and diversity
- Resources for customer involvement
- Impact of customer involvement
- Value for money
- Customer involvement track record
- Performance management
- Training and capacity
- Recommendations on recording and reporting.



The report was comprehensive, pointed out both strengths and weaknesses and contained a number of recommendations. Overall, strengths narrowly outweighed weaknesses, though considerable scope for improvement was indicated. In relation to the Tenant Panel it concluded that:

“Involved tenants are not satisfied that the Tenant Panel is effective.”

Almost all of the items identified in that paper have either been resolved or are in progress and will be completed soon. This current document will include all of those areas.

Milestones

On any journey there are milestones, which mark points of achievement and indicate progress made. Some of those milestones at Tarka include the following:

2010	United Community Centre in Tarka Management	2011	Mobile Office approved by Board
	Customer Involvement Manager in post		Full time Customer Involvement Assistant in post
	Customer Involvement Agreement		Board Recruitment and Training Policy in place
	Scrutiny Panel - Westward Group initiative		2011 Active Tenants Event
	Recruitment of new involved customers		Restructure of Tenant Panel
	Improvement to Tarka Times by Communications Group		Full Customer Training Programme in place
	Summer Play Programme		2011 Annual Report produced
	2010 Active Tenants Event		Full menu of involvement opportunities in place
	2010 Annual Report produced		Structural Overview Group (SOG) - Westward Group initiative
	Local Offer		
	5 year Customer Involvement Strategy		
2010/11	Resident Auditors Void Project - Westward Group initiative	2011 -	Outcome based model rolled out to all departments at Tarka
	Value for money savings for Customer Involvement in excess of £6K	ongoing	Complaints Review Panel

How much does it cost?

The annual budget for Customer Involvement is £42,000. But this does not include staff and customer time. Staff time is absorbed by Tarka and customer time is estimated at £9 per hour. What this amounts to in real terms is shown on the coin below.

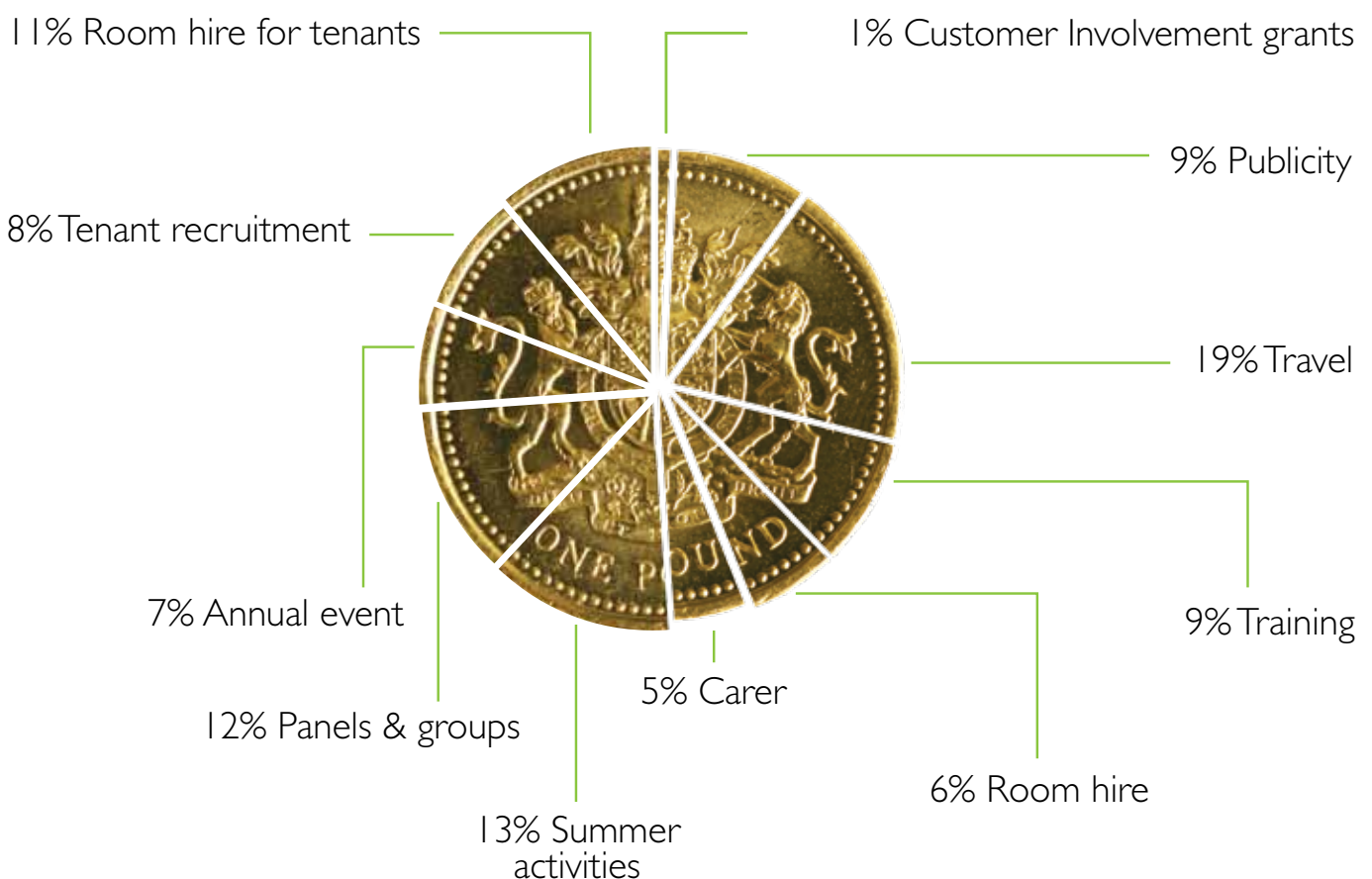
We do not have figures from April 2011 to September 2011 (they will be included in our next Impact Assessment), but the figures for how our budget was spent from May 2010 to April 2011 are below.

With all of the above there has been considerable input from Board, staff (including all levels from the managing director to part-time officers) and a dedicated and committed cohort of actively involved customers. The total time given to meetings alone adds up to more than 400 hours per involved customer (see chart Appendix A on page 11, which covers May 2010 to April 2011).

Figures from Tarka Annual Report 2010-2011

- £64.94 is spent per household on Customer Involvement, up from £58.18 over the previous year.
- 70.5% of customers are satisfied that their views are being taken into account.
- 88% of customers feel they are kept very or fairly well informed.
- 600 customers were involved in our Local Offer Survey.

Customer Involvement costs



Customer Involvement Impact at a glance

Throughout this report we will indicate both the level of impact for Customer Involvement and VFM effectiveness of each involvement activity as:

- HIGH

- MEDIUM

- LOW

- DON'T KNOW

Criteria for measurement of impact

For each piece of work in which customers have been engaged we compare agreed objectives with outcomes actually achieved. Where there is a good match between objectives and outcomes, then we consider this to be an indication of success.

Obviously this will vary from project to project, but this does give us good idea of the impact of each piece of work and an overall picture of how effectively we are working. It also helps to identify areas for improvement.

In terms of value for money, for example, we compare the cost of using external specialists or consultants for particular projects with the overall cost of staff and customer time spent on those projects. Where savings are made we use this to indicate value for money. The development of a Board Recruitment and Training Policy by a joint team of staff and customers, for example, is an excellent example where considerable savings were made.

Hard and Soft outcomes

Many of the outcomes in Customer Involvement work are soft outcomes. Feeling listened to, being effective in meetings, having increased confidence, being informed and skilled at working with others are examples of soft outcomes. Soft outcomes are directly related to hard outcomes, like increased satisfaction among customers on repairs, maintenance or kitchen upgrades, for example. Soft outcomes enable customers to influence service delivery. This is empowerment in action.

Customer Involvement Activity	Tarka Departments	Impact (high levels of satisfaction and outcomes)	Value for Money	Future Plans
Customer Involvement Agreement – joint working group	All			Reviewed annually
Recruitment Drive	Customer Involvement Team and customers			Tenant Panel and staff to recruit to improve VFM
Tarka Times	Customers and staff			Ongoing development
Summer Play Programme 2010 and 2011	Customer services and Customer Involvement			Reviewed annually
Active Tenants Event 2010 and 2011	All			Reviewed annually and reduce costs - Tenant Panel to take more ownership

Continued over leaf

Customer Involvement Impact at a glance

Continued from page 7

😊😊😊 - HIGH

😊😊 - MEDIUM

😊 - LOW

? - DON'T KNOW

Customer Involvement Activity	Tarka Departments	Impact (high levels of satisfaction and outcomes)	Value for Money	Future Plans
Annual Report 2010 and 2011	All	😊😊😊	😊😊😊	Reviewed annually
Scrutiny Panel	Westward initiative with customers and CI staff	?	?	Pilot project and impact assessment to be completed 2012
Resident Auditors Voids project	Westward initiative with customers and CI staff	😊	😊	Under review
Local Offer	All	😊😊😊	😊😊😊	Reviewed annually
Customer Involvement Strategy	CI team and Tenant Panel	😊😊😊	😊😊😊	Performance on target and updated regularly
Mobile office Steering Group	All	?	?	Started August 2011, evaluation pending
Board Recruitment and Training - joint working group	CI team and Tenant Panel	😊😊😊	😊😊😊	Policy now operational and recruitment undertaken
Restructure of Tenant Panel	CI team and Tenant Panel	😊😊😊	😊😊😊	Approval of SMT, TP and Board
Full Customer Training Programme in place	CI team and Tenant Panel	😊😊😊	😊😊😊	Reviewed annually
Full menu of involvement opportunities in place	CI team and Tenant Panel	😊😊😊	😊😊😊	Reviewed annually
United Community Centre in Tarka Management	Customer services, CI team and customers	?	?	Under review
Outcome based model rolled out to all departments at Tarka	All staff	?	?	Started August 2011, evaluation pending
Complaints Review Panel	All	?	?	Relaunched September 2011, evaluation pending
Structural Overview Group (SOG)	All	?	?	Started June 2011, evaluation pending

What does this tell us?

As you can see, Tarka Housing has increased its commitment to customer involvement considerably. There is much more customer involvement activity going on and more opportunities for customers to be involved. More staff resources have been allocated, and a greater amount of time has been spent ensuring that a solid foundation and infrastructure supports that activity.

Staff find working with customers more rewarding, and acknowledge that more work has to be done to embed customer involvement at the heart of the business. Mechanisms are in place to achieve this through our outcome based model.

The area of greatest impact is in Customer Involvement itself, with correspondingly high levels of satisfaction among actively involved tenants. But there is room for improvement here, too. Work will continue to ensure that the Tenant Panel is effective, that the achievements of involved tenants are publicised more widely and that recruitment of new involved customers is a responsibility shared by both staff and involved customers alike.

The impact of involvement activities in connection with service level improvements to repairs, maintenance, complaints and housing management are at the medium to low level. This is probably related to two main factors:

- Our outcome based model is relatively new and staff need to gain more experience in its day-to-day use.
- The need to recruit more customers to improve levels of engagement.
- Customer Involvement is not written into all job descriptions, nor is it part of our staff performance management system for all employees.

The good news is that this is all in hand. At the top of our agenda for this year and through into next year are the following areas for development:

- ✓ Recruitment of involved customers
- ✓ Rebuilding our Complaints Review Panel
- ✓ Reviewing terms of reference for Resident Auditors
- ✓ Getting our services out to the community
- ✓ Partnership working with group colleagues
- ✓ Publicising the achievements of our active customers
- ✓ More community involvement and development
- ✓ Policy and strategy review
- ✓ Improving how we deal with Anti Social Behaviour
- ✓ Development of a Neighbourhood Strategy
- ✓ Group wide review of Resident Involvement practice



Progress since 2009 Assessment Report

2009 Assessment Report Areas	Progress to date (Autumn 2011)
Access and customer care	Six editions Tarka Times residents newsletter; Customer Involvement Agreement; Customer Involvement Strategy; Events publicity; Involvement opportunities menu; Training programme;
Equality and diversity	Customer profiling; customer representation on Westward Equalities Access Group; and Equality and Diversity training for all active tenants and board members
Resources for customer involvement	Full time Involvement Manager and Assistant are in post
Impact of customer involvement	Customer Involvement Impact Assessment
Value for money	Value for money matrix is used in evaluation of all customer involvement work; £6,000 value for money savings in 2010-11
Customer involvement track record	Clear developmental progress – this document
Performance management	Customer Involvement Strategy is recorded in performance management system; outcome based model records all work and achievements
Training and capacity	Full training programme in place; 12 training sessions completed in 2010-11
Recommendations on recording and reporting	Implemented via outcome based model and Clearview (performance management system)

Together we can get there. Customers drive accountability and improvement. By getting involved and working with Tarka you can make a difference and know what it feels like to have influence and make changes that matter. If you require more information on how to get involved please contact the Customer Involvement Team on 01237 428088. Our team will be glad to help you.



Appendix A.

Figure 1. Customer Involvement Hours May 2011 to April 2011.

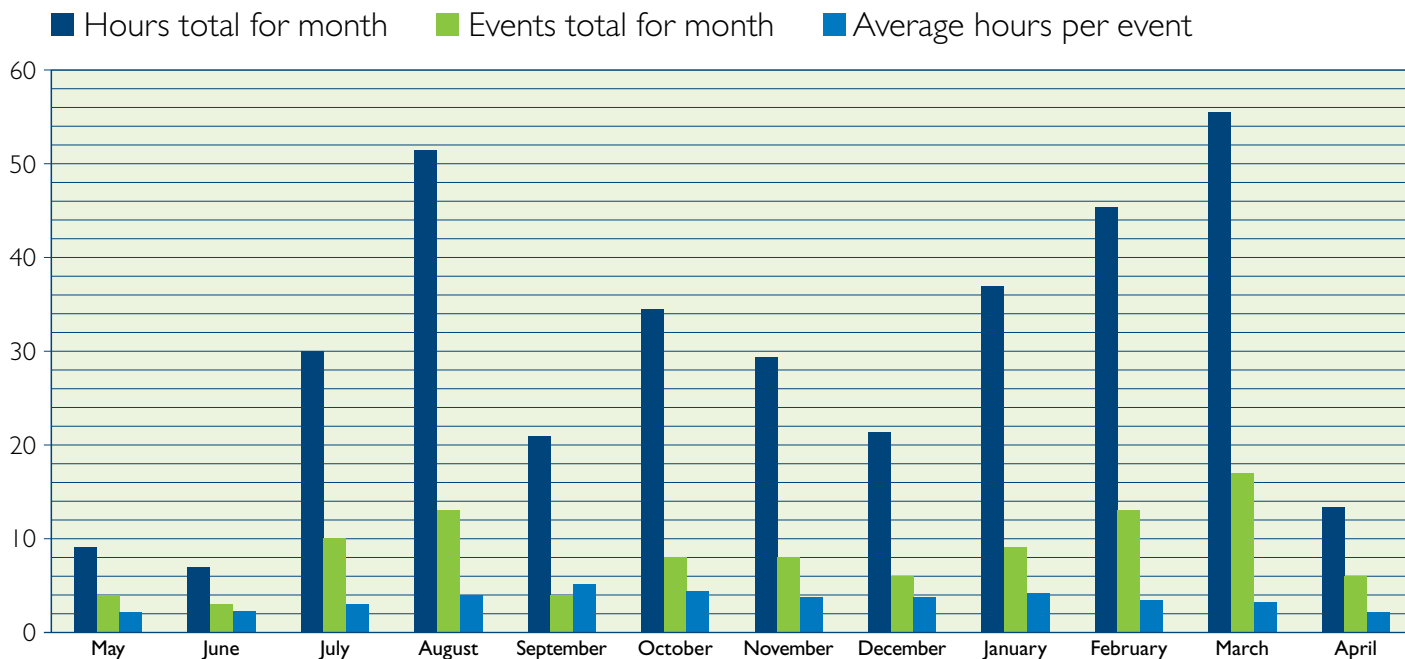


Figure 2. Value for money matrix underpinning value for money assessment

Project/Role Description	Inputs (cost & resources)	Outputs	Outcomes for Residents/others	Impact (inc VFM) for provider
<p>Group of tenants working with two staff members to develop a draft policy document on resident Board member interview, selection and recruitment. Their remit was to draft a suitable policy that reflects best practice in the housing sector with sufficient built in safeguards that ensure principles of fairness, probity and adherence to equality and diversity.</p>	<p>Staff time x 2 Volunteer time x 4, but reduced to 2 Venue hire (used free Tarka and TTS) Mail costs £5.00</p>	<p>5x Group meetings; background research and reading; discussion and drafting; training x 2</p> <p>Agreed Policy document that incorporates advertising, selection, interview and training for potential Board members</p>	<ul style="list-style-type: none"> • Policy accepted by Boards • 95% satisfaction by tenants of process and resulting policy • Advertising, selection and interview process used in recruitment by Tarka: • 2x Board members recruited 	<ul style="list-style-type: none"> • Policy adopted no increase in resources • Increased levels of understanding and confidence among tenants and staff • Increased satisfaction from those involved in implementation of policy • Compliance with NHF and co regulation requirements • Total time involved for staff: 20 hrs. Total time involved tenant volunteers: 20 hours at £9.00 per hr, including expenses (£360) and Training (£385.60) Contrasted with cost of consultancy: £2500





If you or someone you know would like this Customer Involvement Impact Assessment on CD or audio tape, in large print, in Braille, or translated into another language please contact our Communications Team on 01237 428080 or email info@tarkahousing.org.uk

Si vous, ou une personne que vous connaissez, souhaitez obtenir cette « Évaluation d'impact sur la participation des clients » sur CD, cassette audio, en gros caractères, en braille ou traduit dans une autre langue, contactez notre équipe des communications au 01803 217560 ou par e-mail à info@tarkahousing.org.uk

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