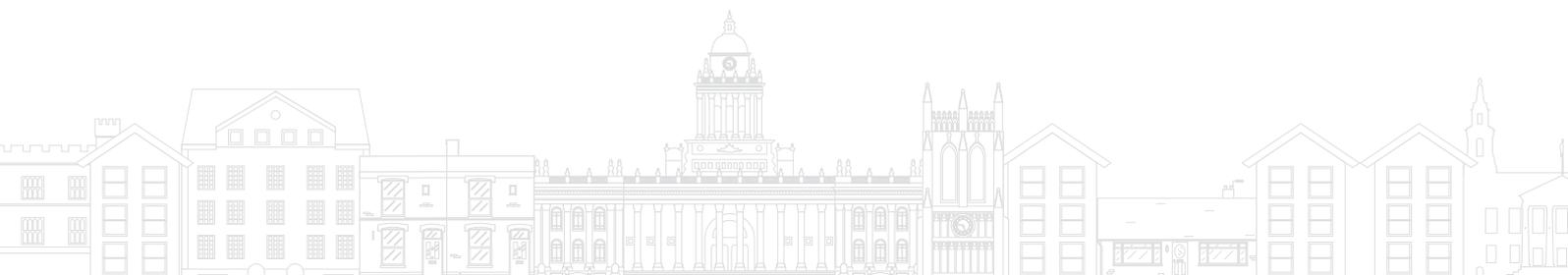


Customer Engagement Policy



1 Purpose

- 1.1** To ensure that the desire of the Board of Leeds & Yorkshire Housing Association (LYHA) to hear our customers' voice is widely understood throughout the Organisation and by its customers and reflects good governance guidance and practice.
- 1.2** To ensure that there is a clear framework of meaningful customer engagement opportunities in place, which is widely promoted to customers.
- 1.3** To demonstrate the clear structures and roles in place, together with governance oversight mechanisms, which support the customer engagement vision and activity in the Organisation.
- 1.4** This policy supports the delivery of the three core areas of LYHA's Customer Experience Strategy, specifically: customer engagement, operational efficiency, and customer centric culture.
- 1.5** LYHA is committed to extending customer engagement, methods of obtaining customer feedback and customer satisfaction measurement. This enables us to better understand current customer needs, how customer needs change over time and how successful we have been in our delivery of successful customer outcomes. We do this by placing customer views and priorities at the heart of our decision-making.
- 1.6** Involving customers is an essential part of meeting legal and regulatory obligations. However, effective customer engagement also has wide ranging benefits for customers, colleagues, and the organisation. These include improved, more responsive services; increased customer satisfaction; improved decision making and better value for money. By working with LYHA, customers have genuine opportunities to influence and challenge our services, strategies, and governance; and to make a real difference within their own communities, as community engagement also enhances community sustainability and improves access to services.
- 1.7** The policy sets out the method of ensuring an effective two-way dialogue between the Organisation and its customers on issues including safety, to allow the Organisation to understand the concerns of its customers and provide them with regular assurance on how the Organisation keeps them safe in their homes.



2. Policy Scope

- 2.1 This policy addresses the requirements of the NHF Code of Governance 2020 in relation to Customer Focus, Accountability and Board Election, Selection and Appointment. It also follows best practice principles drawn from the TPAS National Tenant Engagement Standards and sector wide practices.
- 2.2 This policy applies to all colleagues engaged in the delivery of customer facing services within the Organisation, all members of the leadership team and all Board and Committee Members.
- 2.3 This Policy applies to all legal entities within LYHA which have customers.

3. Policy Statement

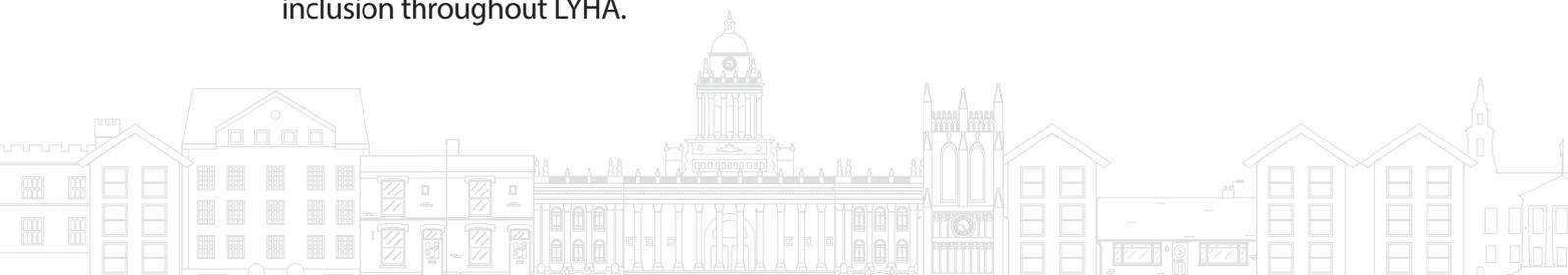
- 3.1 This policy supports LYHA's mission to enable our customers to live well by providing warm, safe and secure homes, by investing in relationships and by delivering great services. In achieving this, we are committed to putting customers at the heart of everything we do, understanding our customers' needs, expectations, and aspirations, listening to and working together with our customers.
- 3.2 The main focus of our decision making is on the needs and safety of our customers.
- 3.3 Minimising or removing barriers to customer engagement is an important part of this commitment, and this policy aims to achieve this, along with being open and transparent.
- 3.4 Our customers and colleagues have identified four key ingredients to ensure successful engagement at LYHA, each aligned to the Charter for Social Housing.



- 3.4.1 Everyone** – Our approach to engagement will be fully inclusive, enabling customers to engage as much or as little as they wish. It is important that the voices of customers are representative of our customer base. This ensures that the diverse needs of customers are taken into account.
- 3.4.2 Communication** - A broad range of communication channels, skills and culture is required for effective engagement. This includes listening, hearing and truly understanding our customers' lived experiences. This also helps ensure customers have access to information to hold LYHA to account.
- 3.4.3 Reliability** – We will do what we say to continue to build up a relationship of trust and joint working with our customers and communities. This helps ensure we treat customers with fairness and respect.
- 3.4.4 Impact** – Everything we do will have a purposeful impact that can be demonstrated, and shared through our customer engagement framework. This ensures that we are accountable to our customers, and they influence the decision and priorities of LYHA.



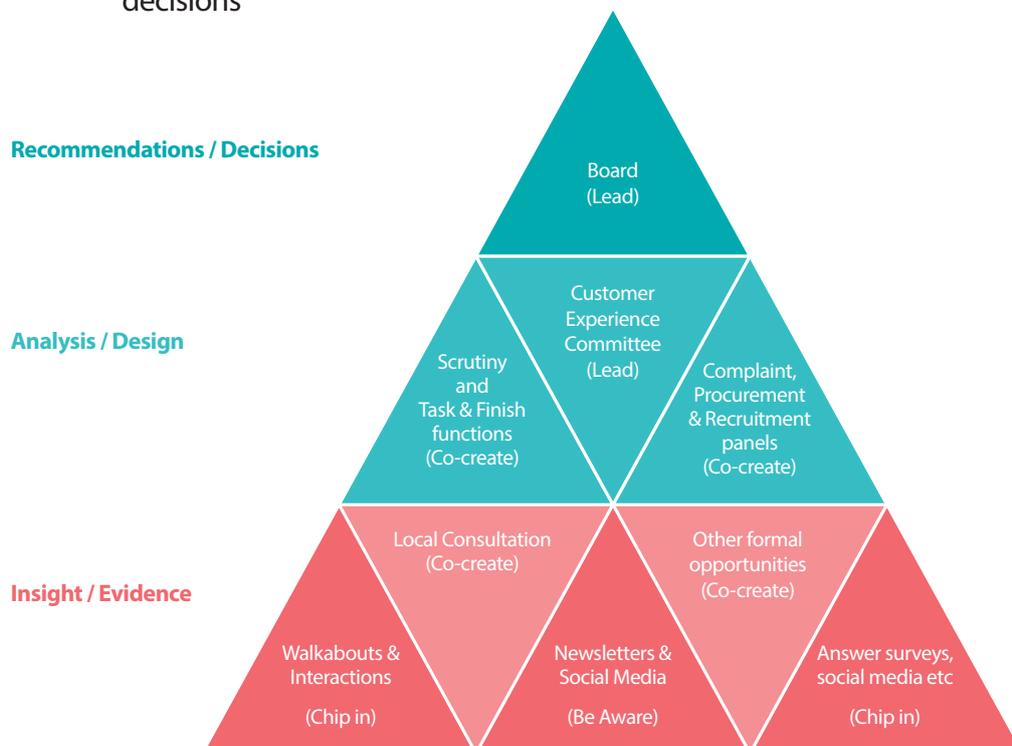
- 3.5** Our Board is committed to sustaining a customer centric organisational culture which is positive and focused on the needs of our customers and embeds equality, diversity and inclusion throughout LYHA.



4 Engagement Framework

4.1 Our engagement framework consists of 4 tiers of involvement, which has been adapted from TPAS' best practice model:

- **Be aware** – LYHA provides information in accessible formats for everyone
- **Chip-in** – Customers can be consulted in formats, times and locations that are convenient to them, proactively contributing to consultation activities
- **Co-create** – Customers are formally engaged with LYHA, regularly contributing through formal mechanisms, reviewing and designing services and making recommendations
- **Lead** – Customers form part of LYHA's strategic governance framework, making decisions



Insight / Evidence

Interactions used to produce insight of 'lived experience'

Options for customers to provide information about their experiences

Options for customers to be aware, which might provoke proactive customer action

Analysis / Design

Customers & colleagues work together on scrutiny and task & finish functions using insight from base functions

Customers & colleagues work collaboratively reviewing complaints, tenders etc

Recommendations / Decisions

Customer on the Board (Receiving assurance from CEC)

Majority representation of customers on CEC (Seeking assurance via scrutiny & other functions)



4.2 Be Aware

LYHA will ensure that all customers have the opportunity to be aware of activity through the provision of information in accessible and understandable formats such as:

- 'You said, we did' communications
- Social media campaigns
- Website
- Newsletters with local features
- Noticeboards
- Advice via interactions with colleagues and stakeholders
- Publicising engagement opportunities

This tier of engagement is outward focused, aimed at providing information for customers to access about LYHA, engagement opportunities and community (customer led) activities.

LYHA will use this tier of engagement to demonstrate how feedback has been used to deliver reliable services, and the impact of engagement opportunities, in addition to the more routine service interactions.

4.3 Chip-in

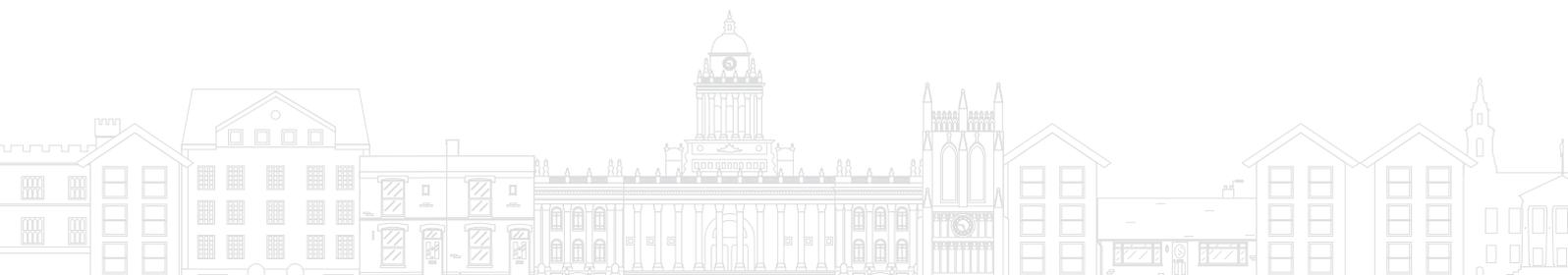
LYHA will provide the opportunity for all customers to put themselves forward to provide their views:

- Experience & perception surveys
- Estate Inspections
- Tenant & Resident Groups
- 'Live' events and opportunities to interact with LYHA leaders
- Dedicated page on website

This tier of engagement enables all customers to 'pick and choose' how and when they want to actively engage. It is used to gain important insight and gain the views, opinions, and experiences of a broad and representative range of customers.

Opportunities to 'chip-in' will sometimes be incentivised to optimise as broad a range of views and opinions as possible, if this enables us to maximise our understanding of customer insight and segmentation.

Chip-in activities will be planned and promoted in advance, with feedback to demonstrate impact and reliability programmed through the 'be aware' tier.



Supporting our local engagement priority, LYHA will promote and support the establishment of local groups by providing capacity building training and running costs fund. Associations must meet an eligibility-criteria relating to governance and activities to continue receiving financial support. Specific details of financial support, expenses and the rules governing these can be found in the Access to Involvement Guidance.

There will be opportunities for customers to engage directly with members of the Board, Customer Experience Committee and Executive Team. This provides an opportunity for the organisational decision makers to have unfettered access to customer experiences.

4.4 Co-create

LYHA will offer formal opportunities for customers to engage, influence and make decisions about services that impact them through the following mechanisms:

- Annual consultation review
- Customer engagement in recruitment & selection to key roles
- Customer engagement in procurement exercises and contractor selection
- Customer engagement in complaint panels
- Scrutiny exercises
- Task & Finish or focus groups

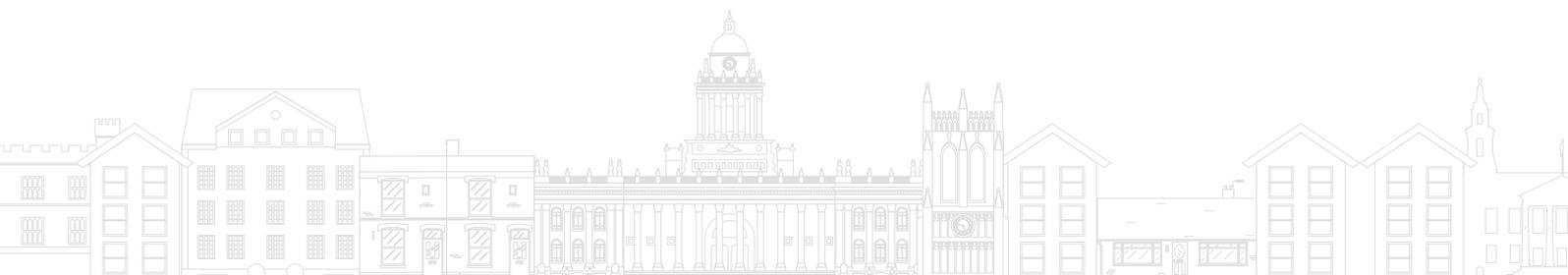
An annual review of the engagement outcomes, successes, and areas for development will be undertaken. This will be used to inform engagement and service delivery activity over the forthcoming year.

Activity arising from the co-creation and chip-in tiers will be recorded to provide robust and actionable insight to support subsequent recommendations and decisions.

LYHA will support capacity building for individuals and groups through peer support, training and conference fees aimed at widening knowledge and exploring best practice in engagement activities which support strategic objectives. This includes a commitment to training colleagues.

The Customer Experience Committee is involved in complaint panels, helping to review and determine outcomes as well as identify and track learning. The Committee will also receive a regular report on the number, nature and the Organisation's response to customers complaints, including those determined by the Housing Ombudsman. The Committee is also advised as to any thematic issues recurring in complaints and what response/service improvements will be made as a result of them.

Task and finish or focus groups will be established for time limited periods to undertake specific, targeted pieces of work, such as policy and service development, procurement, recruitment and selection.



4.5 Lead

Placing customers at the heart of decision making and governance is an integral part of LYHA's Engagement Framework. Customers can help lead the organisation, making strategic decisions that affect the running of LYHA by:

- Customer representation on Customer Experience Committee, including ability to become Chair of the Committee
- Customer representation on Board, including opportunities to become Chair of the Board

LYHA aspires to have customer representation at the highest levels of organisational governance, hear the customer experience and stories. Customers will not be differentiated from other Board members in status, although they will bring a unique perspective to Board decisions.

The Customer Experience Committee is delegated by the Board to seek assurance that the customer voice has been heard through effective engagement mechanisms to support decision making.

4.6 Our Customer Experience Committee regularly reviews the activities of the Engagement Framework, ensuring it remains effective and in line with our strategy.

4.7 We report to our customers regularly on how we deliver our commitment to customer focus via our Annual Report to Customers.

5 Equality & Diversity

5.1 LYHA will ensure that in delivering our services we continue to be inclusive and representative. We will ensure that this is achieved through the delivery of LYHA's Equality and Diversity Strategy.

5.2 LYHA will ensure that this Policy can be made available in alternative formats.

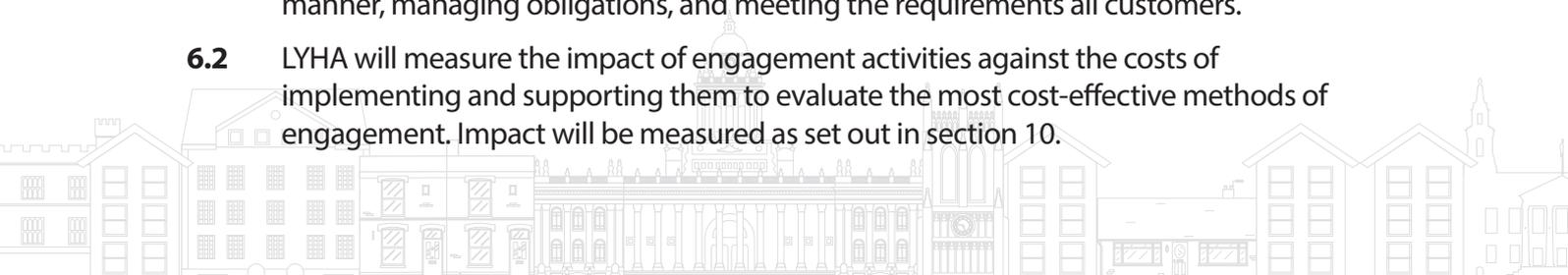
5.3 This policy will be applied to all customers regardless of age, disability, gender reassignment, marriage and civil partner status, pregnancy and maternity, race, religion and belief, gender, and sexual orientation.

5.4 This policy includes providing customer facing colleagues with support and training to understand and apply good practice in equality, diversity, and inclusion.

6 Value for Money

6.1 LYHA will work to ensure engagement is undertaken in an efficient and effective manner, managing obligations, and meeting the requirements all customers.

6.2 LYHA will measure the impact of engagement activities against the costs of implementing and supporting them to evaluate the most cost-effective methods of engagement. Impact will be measured as set out in section 10.



7 Data Protection

- 7.1** LYHA collects information ('personal data') so that we can manage and support our relationship with our customers, comply with legal obligations, improve our services, and achieve our legitimate business aims.
- 7.2** We are committed to complying with data protection legislation when handling customers' data. Customers have rights around their data, including the right to access their data, and to object to the way it is processed. For more information on how and why we process customers' data, and how customers can exercise their rights, please see our full Privacy Policy on our website at www.lyha.co.uk/privacy-policy.

8 Consultation

- 8.1** Customers, colleagues, and members of both the Customer Experience Committee and Board have been involved in the co-design of this Policy.

9 How the policy will be implemented

- 9.1** The Neighbourhood Services Manager is responsible for the implementation and monitoring of this policy.
- 9.2** Regular training of colleagues, performance monitoring and reporting will be overseen by the Neighbourhood Services Manager.

10 Outcomes & Monitoring

- 10.1** Successful engagement is a foundation for delivering services that meet the needs of customers. LYHA views this as a golden thread running through all service delivery and measures customer satisfaction and gets feedback from transactional surveys undertaken after services have been delivered/received.
- 10.2** However, LYHA will specifically measure and monitor the following in relation to the relative and direct success of the Customer Engagement Policy:
- Satisfaction that views are listened to and acted upon
 - Opportunities to make views known
 - Net promoter score
- 10.3** LYHA will report overall outcomes relating to how customer engagement has influenced service delivery along with the results of engagement indicators in the Annual Report to Customers.

