

# Together with Tenants:2024-2025 Action Plan

*Strengthening relationships between housing associations and residents*



## Commitments:

*Housing associations that adopt the Together with Tenants charter are making six commitments:*

1. **Relationships:** Housing associations will treat all residents with respect in all of their interactions. Relationships between residents and housing associations will be based on openness, honesty and transparency.
2. **Communication:** Residents will receive clear, accessible and timely information from their housing association on the issues that matter to them, including important information about their homes and local community, how the organisation is working to address problems, how the organisation is run, and information about performance on key issues.
3. **Voice and influence:** Housing associations will seek and value the views of residents and will use this information to inform decisions. Every individual resident will feel listened to by their housing association on the issues that matter to them and can speak without fear.
4. **Accountability:** Collectively, residents will work in partnership with their housing association to independently scrutinise and hold their housing association to account for the decisions that affect the quality of their homes and services.
5. **Quality:** Residents can expect their homes to be good quality, well maintained, safe and well managed.
6. **When things go wrong:** Residents will have simple and accessible routes for raising issues, making complaints and seeking redress. Residents will receive timely advice and support when things go wrong.
7. **Equality, Diversity and Inclusion:** Housing associations will be inclusive organisations which seek views from all groups. Approaches to resident involvement will be inclusive by engaging with residents from a range of backgrounds and experiences. Consultations with residents will include outreach to underrepresented communities, including through targeted communications

[National Housing Federation - Together with tenants](https://www.housing.org.uk/TogetherWithTenants)

## Action Plan:

| <b>Relationships</b> |  |  |  |
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| <b>Ref</b>           | <b>Commitments</b>   | <b>Actions</b>   | <b>Progress</b>  |
| 1.a                  | Customer involvement & communities' strategy, involvement offer, and service standard statement. | Use our customer involvement & communities' strategy, involvement offer and service standards to inform our work and publish an updated set of documents for 2025-2028 | Published on website and used to inform work. Due for update to start in Q3 to be completed by June 2025 (to run 2025-2028)  |
| 1.b                  | Value, support and develop our volunteers.   | Hold sessions/events to acknowledge the work of customers who volunteer for us and promote their contributions through our communications.                             | Continued TPAS training for scrutiny team, with second digital session being arranged. 2x scrutiny customers booked to attend TPAS annual conference in Loughborough in October. Created new thank you message that goes to all customers after attending an involvement session. This is also added to I&C newsletter. Started planning christmas thank you events. |
| 1.c                  | Value, support and develop our volunteers.   | Provide support and training to the scrutiny team and other involved customers through access to TPAS and other training providers.                                    | Continued TPAS training for scrutiny team, one session held in August with second digital session being arranged. Scrutiny Chair attended July conference and reported back to team. 2x scrutiny members booked to attend TPAS annual conference in Loughborough in October.   |
| 1.d                  | Ensure Scrutiny are informed of high-level business notices.                                     | Provide updates from the executive committee meetings at Scrutiny quarterly business meetings.   | To be delivered at business meeting  |
| 1.e                  | Ensure all changes to customer-facing services and policy reviews include customer involvement.  | Engage with teams across the business to develop involvement opportunities for each service/policy change.   | Fencing & Boundaries Policy Focus Group held in July with Property team, worked with neighbourhoods &  |

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|     |  |   | <p>caretakers to arrange and deliver 2 pop-ups sessions over the summer on estates in Trowbridge &amp; Frome, Tenancy Fraud Focus Group in September with Neighbourhoods' team, Development Strategy Focus group on line in September with Development Director, Fire Risk Assessment focus group with compliance team in September. Continued to support Warminster Rehousing Project.</p>   |
| 1.f | <p>Selwood values - developed by staff - and accompanying behaviours guide to set out how we work.</p> | <p>We had 249 nominations made across the organisation for the awards, made by 86 staff members which we felt was a great number of nominations. There were also 135 votes cast for the team poll, so a good level of engagement from staff. The activity at staff event discussing a potential change to our values was also well received and attracted good participation from field and desk-based staff alike.</p> | <p>Nothing to update since the LTVA's in June, however work is still underway reviewing our values, reflecting the 8 years that have passed since they were introduced and the development of the organisation and changes to our ways of working and culture over that time.</p>   |
| 1.g | <p>Keep customers updated in developments of Horizon, Dynamics and the customer portal.</p>            | <p>Quarterly update on progress of Phase 1</p>  | <p>The second set of processes, including anti-social behaviour and safeguarding, are now live in Dynamics. Work is underway on the next phase, which will give our Customer support team the ability to manage contact with customers within Dynamics. Work on the next phase, which includes lettings and the associated portal work, is due to start this autumn, although the lettings and portal elements will probably begin in the new year.</p> |

## Communication

| Ref | Commitments   | Actions  | Progress   |
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| 2.a | Regular communication with all customers on key notices and features that customers have told us are priorities through Customer Conversation 2021. | For the customer update, this continues to be sent each month. Our July issue covered topics such as domestic abuse, highlighting as a HA our responsibilities on this matter, as well as feeding back on a number of involvement activities. In June we featured articles around water safety and cost of living advice to lower water bills. As you know, we'll support the next customer conversation update and will take forward any changes to customer's stated priority areas. | We continue to see good engagement with our monthly customer update, the quarter saw an average open rate of 77%, covering topics such as our domestic abuse policy, advice around CCTV and smart doorbells, gas safety and recently promoting the customer conversation survey. We continue to work with our team reps to keep our website content up to date, and are planning a drop-in day to support this. We're also making improvements to our website to help us better manage and edit the site, and so we can share this responsibility with key teams.<br>Social media, especially Facebook, continues to be an important channel for customer communications, we aim to drive a mix of educational and inspirational content through this channel, posting 26 times in Aug and 37 times in Sept. Instagram, a recent addition which we are piloting, is slowing growing its follower base. |
| 2.b | Promote involvement opportunities and outcomes to customers.  | Monthly Involvement & Communities mailout sent to all customers who have requested further information on involvement opportunities.   | Newsletters sent in July, August and September with a postal insert in customer newsletter promoting some of the involvement opportunities. August & September editions have become packed full of a mixture of focus group opportunities to sign up to, surveys &   |

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|     |  |   | polls to complete and feedback on previous customer sessions and how they influenced policy/service change.  |
| 2.c | Promote involvement opportunities and outcomes to customers.                                   | Results, feedback and outcomes - you said, we did - of all involvement opportunities published through mailout and I&C website pages. | We have renamed our website page promoting completed involvement opportunities: "Created with Customers" and continue to update this with all info on how involvement has influenced service changes:<br><a href="https://www.selwoodhousing.com/get-involved/created-with-customers/">https://www.selwoodhousing.com/get-involved/created-with-customers/</a> We also link to these in the monthly mailout  |
| 2.d | Promote Stronger Communities Fund to local communities and enable groups to apply for funding. | Promotion of Stronger Communities Funding through website, social media, customer newsletter and mailout and external channels.       | Funding of £6687 granted to 4x projects: Old Sarum Pantry, Wiltshire Digital Drive, Westwood social club and forest community centre.  |
| 2.e | Promote Stronger Communities Fund to local communities and enable groups to apply for funding. | Support local communities to apply for grants through simple application system and good communication throughout process.            | Increased social media promotion on LinkedIn, X, Facebook & Insta. Worked with SWPA (South West Procurement Alliance) to help increase SCF pot. They will provide money annual to our fund, they visited office for a photoshoot and we did some joint promotion over social media platforms. We also received a similar payment from a contractor called EEM. Both of these have been assigned to projects. Worked with Locality to promote some additional funding from SWPA of 2x £5k grants to charities/Community Groups in our area. |

## Voice & Influence

| Ref | Commitments   | Actions   | Progress  |
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| 3.a | Customer representation on Board - three of nine places reserved for customers. | Three customers currently on Board and vacancies advertised when they arise.                        | Board to recruit 2 new customers next year as 2 are coming to end of term.  |
| 3.b | Scrutiny team empowered to carry out their function and have a voice.           | Scrutiny team of volunteer customers conduct reviews into services and performance.                 | Currently team of 5, promoting out to customers that we have vacancies for them to join if interested. Review #17 action plan agreed and in progress.   |
| 3.c | Scrutiny team empowered to carry out their function and have a voice.           | Scrutiny attend Board meetings on completion of reviews to present their reports.                   | Review #16 completed and taken to Board, Sandie & Roy reported and Board approved.  |
| 3.d | Scrutiny team empowered to carry out their function and have a voice.           | Monitor and complete all actions agreed from scrutiny review #15 into Operational Communications    | Completed and reviewed  |
| 3.e | Scrutiny team empowered to carry out their function and have a voice.           | Monitor and complete all actions agreed from scrutiny review #16 into Damp & Mould                  | Review set for January 2025 (6 months after Board approval)   |
| 3.f | Scrutiny team empowered to carry out their function and have a voice.           | Monitor and complete all actions agreed from scrutiny review #17 into Asset Management              | Action plan in place and being worked on by scrutiny and management, set to be delivered to Board in March 2025   |
| 3.g | Together with Tenants charter and action plan.                                  | Scrutiny team input into the annual revision of the commitments and actions of the TWT action plan. | Complete until revision for 2025-2026   |
| 3.h | Customer conversation conducted every three years to inform service delivery.   | Carry out customer conversation in October 2024 and publish all findings.                           | Survey went live on 1st October, sent to 6115 customers online via SurveyMonkey and to 2478 customers via post (all customers will have received one/other, including one each for joint tenants) |
| 3.i | Customer conversation conducted every three years to inform service delivery.   | Use customer conversation outcomes to update and guide future decisions and                         | Survey to close on 22nd October and then data input and analysed with first headline results due early November, to   |

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|     |   | service delivery - keep customers updated.   | be shared with customers and management.  |
| 3.j | Involve customers in the development of the customer portal.  | Involve customers in playback session of lettings part of portal, forecast for Autumn 2024   | Work on the next phase, which includes lettings and the associated portal work, is due to start this autumn, although the lettings and portal elements will probably begin in the new year.   |
| 3.k | Rant & Rave customer feedback platform used to measure and monitor transactional customer satisfaction with various services, via SMS and email | Use Rant & Rave real time data to respond to specific, individual issues promptly  | Low score alert notifications are being forwarded to relevant teams for follow up with individual customers where appropriate (ongoing)   |
| 3.l | Rant & Rave customer feedback platform used to measure and monitor transactional customer satisfaction with various services, via SMS and email | Share Rant & Rave aggregate data with relevant service heads so that it can be used to inform decisions on service improvements  | Q2 reports (overview and individual reports for business areas with >100 responses) to be produced by end October and top level Q2 results presented at October Scrutiny business team meeting. Quarterly R&R reports and insights provided to teams. Team leaders responsible for using the info, along with other info (e.g. costs and staff capacity), to inform improvement action plans. |
| 3.m | Customers provided with range of opportunities to get involved and feedback used to influence decision making and improve our services.         | Involve customers in all customer-facing policy creations and renewals throughout the year including Tree Policy; Unacceptable Behaviour Policy; Mobility Scooter Policy; Tenancy Fraud Policy; Domestic Abuse Policy; Empty Homes Policy; Fencing & Boundaries Policy | 8 customers - Fencing & Boundaries focus group & 20 responded to survey, 5 customers - tenancy fraud FG, 6 customers - fire risk FG, 29 customers values survey and 13 from pop-up events, 15 customers answered code of conduct survey   |
| 3.n | Customers provided with range of opportunities to get involved and feedback used to influence decision making and improve our services.         | Creation and support of a Sheltered Housing Forum.   | Session scheduled for October but cancelled due to illness, rescheduled for early November.   |

| <b>Accountability</b> |  |  |   |
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| <b>Ref</b>            | <b>Commitments</b>   | <b>Actions</b>   | <b>Progress</b>   |
| 4.a                   | Transparency of decision-making, governance, finance and performance.              | Board AGM minutes published on website published annually in November  | <a href="#">Draft-minutes-of-of-Annual-General-Meeting-2023.pdf (selwoodhousing.com)</a>  |
| 4.b                   | Transparency of decision-making, governance, finance and performance.              | Annual financial report published online annually in July.   | <a href="#">Financial statements - Selwood Housing</a>  |
| 4.c                   | Transparency of decision-making, governance, finance and performance.              | Environmental, Social and Governance report published on website annually in June  | <a href="#">ESG report 2023-24 - Selwood Housing</a>  |
| 4.d                   | Transparency of decision-making, governance, finance and performance.              | Annual performance report for customers published on website and shared in customer newsletter in September              | <a href="#">Review our performance in 2022/23 - Selwood Housing</a>   |
| 4.e                   | Transparency of customer involvement.  | Involvement & Communities' team annual report published on website and shared through Involvement & Communities mailout. | <a href="#">I&amp;C report</a>  |
| 4.f                   | Transparency of Stronger Communities Funding.                                      | Policy and published on website with all criteria clearly detailed.  | <a href="https://www.selwoodhousing.com/wp-content/uploads/2023/07/Stronger-Communities-Funding-Policy-June-2023.pdf">Published on website: https://www.selwoodhousing.com/wp-content/uploads/2023/07/Stronger-Communities-Funding-Policy-June-2023.pdf</a> |
| 4.g                   | Transparency of Stronger Communities Funding.                                      | Quarterly publication of projects funded and promotion of project outcomes.  | <a href="#">Published on website: Stronger Communities Fund - Selwood Housing</a>   |
| 4.h                   | Transparency of Stronger Communities Funding.                                      | Publication of annual Stronger Communities Fund spend.   | <a href="https://www.selwoodhousing.com/wp-content/uploads/2024/03/Stronger-Communities-Funding-2023-24.jpg">https://www.selwoodhousing.com/wp-content/uploads/2024/03/Stronger-Communities-Funding-2023-24.jpg</a>   |
| 4.i                   | Transparency of spend of Development Homes England grant funded schemes over £500. | Development Homes England grant funded schemes published online for spend over £500.                                     | This information is on the web site: <a href="https://www.selwoodhousing.com/find-a-home/building-new-homes/expenditure-over-500/">https://www.selwoodhousing.com/find-a-home/building-new-homes/expenditure-over-500/</a>                                  |



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| 4.j | Publish the Scrutiny team's findings to all customers.  | Scrutiny team's review reports published on website and promoted through mailout.  | Reported to Board in July and approved.   |
| 4.k | Publish the Scrutiny team's findings to all customers.  | Scrutiny Chair's annual report published on website and promoted through mailout.  | Chair & Vice Chair currently updating this<br><a href="https://www.selwoodhousing.com/wp-content/uploads/2023/11/Annual-report-22-23.pdf">https://www.selwoodhousing.com/wp-content/uploads/2023/11/Annual-report-22-23.pdf</a>   |
| 4.l | Together with Tenants charter and action plan.  | Scrutiny team monitor and challenge the commitments and actions of the TWT action plan at their quarterly business meetings. | New monitoring by scrutiny team members to start from October meeting.  |
| 4.m | Whistle blowing policy for staff and customers.   | Reviewed whistle blowing policy promoted to all staff and customers and published online.                                    | No change. Reviewed whistle blowing policy promoted to all staff and customers and published online.  |
| 4.n | Independent Tenant Satisfaction perception surveys conducted quarterly, in line with regulatory TSM requirements.                               | Monitor and publish quarterly results from Tenant Satisfaction Measure surveys   | TSM results for 2023/24 now published on a dedicated website page, along with the details of the survey approach and a copy of the survey questions. This will be updated and extracts used for regular publications in customer updates and on social media sites. 2024/25 Q2 TSM perception survey results now available and will be presented at October Scrutiny team business meeting. |
| 4.o | Rant & Rave customer feedback platform used to measure and monitor transactional customer satisfaction with various services, via SMS and email | Monitor and publish high-level results and stories from Rant & Rave customer surveys   | Results regularly monitored and shared internally. External publication to fit in around TSM survey and Customer Conversation survey articles.  |

**Quality**

| <b>Ref</b> | <b>Commitments</b>   | <b>Actions</b>  | <b>Progress</b>   |
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| 5.a        | Plans to deliver 1,700 new, affordable local homes by 2033.                                      | Number of locally affordable homes built against target of 150 during 2024/25 | We are forecasting delivery of around 140 new homes in 2024/25. We are slightly below target due to the after effects on the economic down turn and market difficulties in 2022/23. This caused a reduction in new sites coming forward and a nervousness amongst developers to start new sites.  |
| 5.b        | Plans to deliver 1,700 new, affordable local homes by 2033.                                      | Number of locally affordable new homes started                                | We are seeing improvement's in the market and availability of more viable new sites now coming forward. We are building up our pipeline of new schemes going into 2025/26 to begin to work back up to an average of 170 homes pa. But it's a slow process after the effects of the last couple of years and planning changes introduced in 2023 slowed down / stopped in some cases new sites coming forward. |
| 5.c        | Selwood Housing Decent Homes Standard monitored.   | Annual report   | We continue to provide regular updates to GADC and have prepared a 2024/25 start of year report on Decent Homes for and a progress review as at August 2024 for the September GADC meeting.   |
| 5.d        | Asset management strategy published 2022 included target of EPC C+ rating for all homes by 2030. | Annual report   | We're continuing to improve energy performance of our properties via a number of planned programmes including: gas boilers, electric heating, windows, loft and cavity wall insulation. We are also in year two of the Social housing decarbonisation project (SHDF). We completed 72 upgrades in 23/24 and are improving a further   |

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|     |   |   | 82properties in 24/25. Total grant obtained for this work will be £1.4m  |
| 5.e | Publish quarterly details of performance against targets on all planned improvement programmes  | Report to GDAC quarterly on work completed against targets and updates to forecasted works. | Planned programmes delivered against target (in brackets) during July 24:<br>Figures are YTD <ul style="list-style-type: none"> <li>• Windows 57 (70)</li> <li>• External Doors 43 (64)</li> <li>• Domestic roofs 43 (89)</li> <li>• Fascias &amp; soffits 38 (40)</li> <li>• Kitchens 141 (124)</li> <li>• Bathrooms 29(28)</li> <li>• Loft &amp; cavity wall insulation 0 (60)</li> </ul>                              |
| 5.f | Publish details of the progress of the Social Housing de Carbon Fund project  | Number of properties to have undergone completed works and raised EPC level to C+           | Work has begun on year two properties although no properties are fully complete due to operational delays, 30 properties are currently having works done. Planning and bid prep for Wave 3 has begun/ Cavity wall insulation has had delays as pre work surveys have found multiple properties already containing adequate insulation levels. The programme will be reduced and is on track to be completed by year end. |
| 5.g | Continue resident engagement throughout de carbon project to support customers through the works  | Update on resident engagement methods from customer liaison officer and I&C team            | A social media post including a video from customers who have already received the works has been shared to encourage others to participate when requested. In process of developing instructional video and leaflet with comms team.  |
| 5.h | Promote work on neighbourhood management, specifically tackling ASB, with regular news features in the customer newsletter and on website | Update quarterly  | We're currently working with the Community Involvement Team to facilitate a Customer Focus Group as part of our routine ASB Policy review. We will be meeting with customers on  |

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|     |   |   | <p>Weds 13th November 2024. This will incorporate a discussion around the ASB Policy and supporting information and guidance on our website.</p> <p>In terms of customer feedback the Tenant Satisfaction Measures (TSM) for our approach to ASB handling was 73% for Q2 (July to Sept 2024). This reflected an upper quartile response from our customers, compared with the median for peer organisations of 61% satisfaction.</p>   |
| 5.i | Create more efficient housing management system by moving over to Dynamics from QL.   | Update quarterly on progress of Phase 1 which includes Tenancy Sustainment case management; Domestic Abuse recording; Safeguarding recording, reporting and monitoring; ASB case management and recording of tenancy breaches | <p>As part of the Business Transformation Project and moving our housing management system from QL into Microsoft Dynamics, there has been good progress over the past few months. 'Phase 1b' in Dynamics has 'gone live' from Friday 2nd August 2024 which includes our case management in the following areas:</p> <ul style="list-style-type: none"> <li>Domestic Abuse</li> <li>Safeguarding</li> <li>Anti-Social Behaviour</li> <li>Tenancy Breaches</li> </ul> <p>Over the first two months the feedback from colleagues as 'system users' has been overwhelmingly positive.</p> |
| 5.j | Smooth and timely transition for the 42 households identified in the Warminster Rehousing Project, addressing housing needs and providing support through the process | Quarterly progress update on rehousing of 42 households in tranches 1, 2 and 3.   | <p>The Warminster Rehousing Project Lettings prioritisation has been confirmed with all customers in the x2 blocks at Alcock Crest and x1 block at Westleigh as follows.</p> <ol style="list-style-type: none"> <li>1) Priority 1 Alcock Crest (43 -60)</li> <li>2) Priority 2 Westleigh (39 - 54)</li> </ol>  |

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|     |   |  | <p>3) Priority 3 Alcock Crest (61 - 78)<br/>By way of a Rehousing snapshot, we're continuing to make good progress....</p> <ul style="list-style-type: none"> <li>• 32 households have moved</li> <li>• 3 customer(s) matched in process of viewings &amp; sign up's</li> <li>• 7 customer(s) awaiting match</li> </ul>  |
| 5.k | Smooth and timely transition for the 42 households identified in the Warminster Rehousing Project, addressing housing needs and providing support through the process | Quarterly progress update on support provided to customers by the Warminster Rehousing Project | <p>Warminster Rehousing Project – the Neighbourhoods team have taken a leading role on the Rehousing Phase of the Warminster Project, reaching out to 42 households at Alcock Crest and Westleigh to provide 'drop in' sessions, dedicated comms channels and to complete housing needs assessments for all households. Working collaboratively with colleagues from across the business inc Lettings, Comms and Property teams to ensure customers are well informed and supported throughout the rehousing process. The Project includes the x3 blocks at Warminster (x2 at Alcock Crest &amp; x1 at Westleigh). During the Qtr Jemma Sherman Housing Co-ordinator (Rehousing &amp; Decant Lead) has supported another 14 households moving over the summer period, to complete their rehousing journey. Jemma continues to work closely with the remaining households to explore their rehousing options as vacancies become available. Customer letters with a full update on the Warminster Project outcomes hand delivered by Jemma in</p> |

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|     |   |   | September 2024 to customers still residing in the x3 Warminster blocks. Local Councilor progress update communication sent during September 2024.   |
| 5.l | Carry out 5-year Priority Neighbourhoods' Project across our communities. | Carry out review and provide feedback to customers on the 2023 project on Westbury & Warminster | Following the completion of the Priority Neighbourhoods Project in Warminster and Westbury at the end of 2023, the respective Project Teams have reviewed the outcomes of local initiatives and community engagement. This has been summarised in a 'You Said We Did' overview for both Priority Neighbourhood Areas. The highlights being the Community Action Days in both neighbourhoods, the Community Garden makeover at Bradley Road, Warminster and working with the Westbury Community Project. During the next Qtr we aim to confirm the CCTV installation for Westleigh, for the partnership initiative that includes Selwood, the Police, the Area Board and Warminster Town Council. We intend to start our next round of Priority Neighbourhoods initiatives from April 2025, with planning from January 2025. |
| 5.m | Carry out 5-year Priority Neighbourhoods' Project across our communities. | Use Customer Conversation 2024 to inform the plans for 2025 Priority Neighbourhoods' project    | The Community Conversation that Community Involvement colleagues are leading on has 'gone live' from the start of October 2024. The survey responses from customers will be the starting point for our next Priority Neighbourhoods Project(s). We will be  |

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|  |  |  | able to listen to customer feedback and analyse the responses to understand local priorities. Following this the project teams will be set up in the period from Jan to March 2025, to start the next Priority Neighbourhoods Project in April 2025 for the year ahead. The Neighbourhoods questions around ASB and tenant sustainment support have been included in the question set for the Community Conversation, which is now underway. |
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| <b>When things go wrong</b> |   |   |  |
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| <b>Ref</b>                  | <b>Commitments</b>  | <b>Actions</b>  | <b>Progress</b>  |
| 6.a                         | Adopted the Housing Ombudsman Complaints Code.                                | Complete Housing Ombudsman code self-assessment annually and publish results on website.                      | The Housing Ombudsman code self assessment was reviewed and published on our website in June 2024.<br><br>The link is here:<br><a href="https://www.selwoodhousing.com/wp-content/uploads/2024/06/Complaint-handling-code-self-assessment-June-2024.pdf">https://www.selwoodhousing.com/wp-content/uploads/2024/06/Complaint-handling-code-self-assessment-June-2024.pdf</a> |
| 6.b                         | New system in place to deal with customer complaints, in line with Ombudsman. | Increase complaints team to give capacity to make proactive calls to check satisfaction at end of complaints. | The expansion of the team continues to deliver positive results. Satisfaction checks are helping to catch any outstanding actions and reassure customers that we are committed to resolving issues.  |
| 6.c                         | New system in place to deal with customer complaints, in line with Ombudsman. | Regular staff training provided to managers using the modules from the Housing Ombudsman including updated    | We continue to offer enhanced "Managing Investigations" training, with the next session scheduled for October  |

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|     |   | training in line with Ombudsman's new code.   | 9, 2024. Both Alex and Zoe provide one-on-one support to case managers to ensure a thorough understanding of the complaints process. This includes regular assistance and reviews of response letters to ensure they are written in plain English and clearly outline the steps we will take to resolve the complaint, including any necessary actions. |
| 6.d | Complaints Forum created from customer volunteers to review staff management of complaints. | Customer complaint forum will be informed and supported to meet quarterly and to review anonymised complaints and their outcomes. | Our customer complaints forum continues to meet quarterly to review closed complaints. To enhance the forum's support, we now invite a team manager to each meeting to provide a more in-depth overview of their area of the business. This initiative has been well-received, and we've received positive feedback from the forum.                     |
| 6.e | Complaints Forum created from customer volunteers to review staff management of complaints. | Customer complaint forum reports to be published quarterly on website   | We consistently publish our quarterly reports on our website, which show a steady and positive increase in the scores awarded.  |
| 6.f | Complaints system is straight-forward and promoted to customers.                            | Complaints process to be regularly promoted in customer newsletter and process detailed clearly on website                        | We remain committed to making our complaints process accessible to everyone. Regular updates are also being included in our monthly customer communications. Additionally, our sheltered team has posted "how to make a complaint" information on the notice boards at our sheltered sites.   |
| 6.g | Transparency of customer feedback on complaints   | Learning outcomes of complaints to be shared 6-monthly in customer newsletter   | The board approved the annual complaint handling report in July. It has since been published on our website and includes key learning outcomes.   |



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| 6.h | Transparency of customer feedback on complaints | Annual reports on complaints to be published including Board report and Customer Annual report. | As above the annual complaint handling report, including key learning outcomes, has been published on our website. |
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### **Equality, Diversity & Inclusion TBC NEW SECTION**

| <b>Ref</b> | <b>Commitments</b>  | <b>Actions</b>  | <b>Progress</b>  |
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| 7.a        | Increased data accuracy of the customer EDI data in our housing management systems                      | Cleanse of existing EDI data.   | Project at Project initiation stage  |
| 7.b        | Increased data accuracy of the customer EDI data in our housing management systems                      | Ensure new housing management system Dynamics has the requirements to store & update necessary data     | In progress  |
| 7.c        | Increased data accuracy of the customer EDI data in our housing management systems                      | Collection of EDI data – this will be collected through existing processes and customer interaction.    | In progress. Customer Conversation survey Oct/Nov will assist with this as included EDI section. |
| 7.d        | Communications plan to ensure customers are aware of why EDI data is collected and what is it used for. | Communications plan to ensure customers are aware of why EDI data is collected and what is it used for. | Customer Conversation survey   |