



ENGAGEMENT STRATEGY

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Authors Names	Sarah Robinson Sue Kershaw
Authors Job Titles	Head of Community Investment and Membership Manager
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1. Introduction

- 1.1 This strategy sets out Rochdale Boroughwide Housing's (RBH) approach to engagement with employees, tenants and members. The Joint Working Group of the Board and Representative Body identified the need for one, cohesive strategy which explains how we will engage with these three groups and other stakeholders in a way which reflects our mutual status and delivers on our values.
- 1.2 It replaces the existing Tenant Engagement Strategy, Employee Engagement Strategy and the engagement element of the Membership Strategy. As a mutual, our rules state that we must still have a separate membership strategy, which is being developed alongside this one, to ensure the areas of commonality are properly cross referenced.

2. Context

- 2.1 As part of the audit on stakeholder engagement in 2014, it was agreed that an overarching engagement strategy statement would be produced. The audit also highlighted that if the strategies were not aligned to the Corporate Plan there is an increased risk they may not contribute to the vision and goals of the organisation, which ultimately could result in RBH not achieving its corporate objectives.
- 2.2 This strategy has therefore been designed to support Our Mutual Future (OMF), and its vision of *people succeeding together to offer great services and places to live and work*, and objective 3, *Membership and Business Resilience*. As part of the development of OMF, members told us that being a mutual with democratic values should mean greater engagement, with more opportunities to influence activity at a neighbourhood level.
- 2.3 As a mutual, it is imperative that our engagement with members is meaningful and benefits our business and our communities. For the allocation of RBH resources and financial decision making to remain in line with the views and needs of members it is essential that we have an effective Engagement Strategy. By engaging our members in our service development, we provide a voice to those who champion our mutuality, enabling us to provide opportunities which make a difference to our business and demonstrate our values. In particular, this strategy demonstrates *democracy*, in giving our members a say in the way we run our business and *championing*, by encouraging our members to take responsibility for our communities and work together to improve them.
- 2.4 Engagement with tenants and employees is key to the success of our business and drives good performance. An engaged employee is more productive, feels positive about coming to work and speaks highly of their employer to customers, stakeholders and partners. Colleague engagement also results in employees taking

pride in, and responsibility for, their work, leading to improvements in customer service as well as productivity. Engaged tenants are more likely to be aligned with the values of our Society and support us to be successful, both as a business and in our communities.

- 2.5 This strategy will also help to underpin and continue the work which has been delivered as part of the member offer project. We need to be clear about how membership benefits individuals, the Society and our neighbourhoods, and make it meaningful and relevant to everyone, giving people genuine reasons to both join and take part.
- 2.6 However, whilst we must focus our more meaningful engagement opportunities on our members, we must still enable our customers, partners and other stakeholders, such as tenant and resident associations, the opportunity to have their say. Effectively engaging our tenants and service users in informing and influencing how we shape our services is hugely important to RBH. This strategy will enable us to do this, whilst meeting the HCA Involvement Standard to '*ensure that tenants have a wide range of opportunities to influence and be involved...*' and still upholding our mutual values and structure.
- 2.7 Customer Insight is a key priority for RBH, and it is recognised in our Corporate Strategy 'Our Mutual Future' that we need a stronger focus on customer and business intelligence. The Customer Insight Strategy explains that we want to be an organisation which is insight rich and where action is taken in response to knowledge gained, ultimately improving the customer experience. The two strategies are interdependent and support the deliver of the other's aims and objectives.

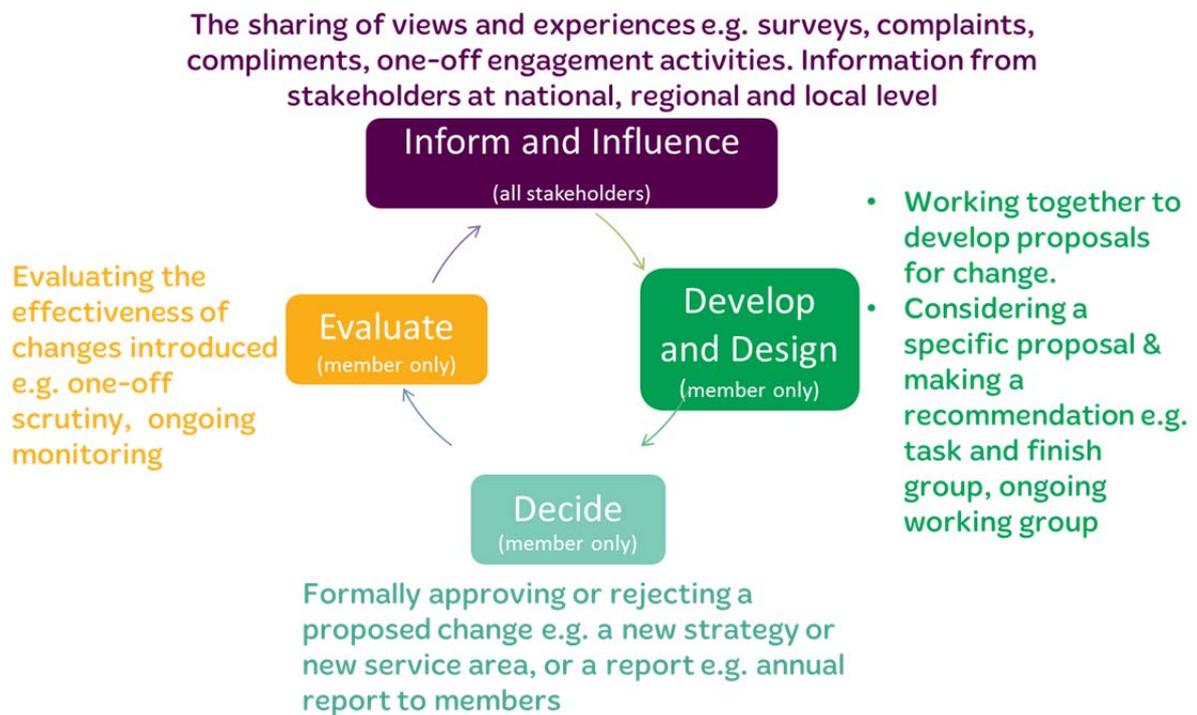
3. Methodology

- 3.1 This strategy has been developed over 12 months. It was scoped by the Representative Body and developed by the Employee Engagement Steering Group and the Communications and Engagement Working Group (CEWG) and discussed by Board.
- 3.2 The work revolved around understanding and clarifying the role and function of members in a mutual housing society. A key consideration was to ensure that the principle of engagement was equitable and so gave a voice to all our customers. Extensive consultation, research and projects have taken place which has informed our approach to engagement, via the following:
 - Mainstreaming member involvement in service development project. This was a project within the 2014 Corporate Strategy. This work established an initial principle that RBH's service developments should be informed by relevant stakeholders views and experiences then further influenced and decided upon by our members, where possible. Part way through the project

it was identified that there were inter-related pieces of work which were planned or in progress across the society that would need to progress to inform a refined version of the involvement principle, some of which are listed below. This initial principle was later re-visited as a foundation for the development of the Engagement Strategy.

- The Membership, Engagement and Representation Review recommended that all tenant and employee engagement activity, with the exception of consumer engagement and statutory employment engagement, are part of RBH’s membership involvement.
- A review of Our Place Action Planning created a decision-making role for members in the allocation of project funding for their neighbourhood through the Community and Decide Together grant funding.
- The Mutual Approaches to Scrutiny pilot brought tenant and employee members together to carry out scrutiny on behalf of RBH. It is intended that this model will be adopted across future scrutiny work.
- Member Survey 2015 – A key finding was that the main expectations of membership are to be informed, listened to and have a voice.

3.3 The outcomes of the above consultation, research and projects informed an initial principle of engagement which was then reality checked in consultation sessions with employees, Continuous Improvement Groups, the Unions and the Representative Body’s Communication and Engagement Working Group. The final principle of engagement is set out in the diagram below.



- 3.4 This principle will support our mutuality, by ensuring all stakeholders have the chance to **inform** us of their views and **influence** how we shape our services, but only our members have the ability to **develop and design** these further, **decide** on proposals and **evaluate** the results.
- 3.5 The development and rollout of both the Project Planning and Management Methodology (PPAMM) project management toolkit and the Strategies, Policies and Service Standards (SPSS) framework now ensures that members are the people at the heart of RBH's service development.

4 Aims, Objectives or Goals

4.1 The four objectives are derived from the four boxes in the diagram:

4.2 Objective 1 – Inform and Influence

To encourage everyone to share their views, experiences and priorities with regards to RBH

- Measure of Success - 75% of customers to be satisfied that RBH takes their views into account when making decisions in the STAR survey 2019. Current – 72.0% (Housemark median 15/16 – 71.9%).
- Measure of success – 10% increase year on year in the number of customers and stakeholders sharing their views via the customer feedback process, website and St. Albans House.
- Measure of success – All engagement activities to include an online element by March 2020.

4.3 Objective 2 – Develop and Design

Provide opportunities for members to become involved with RBH and our communities

- Measure of Success – to increase the number of engaged members 5% year on year for the next three years, in both service improvement and community engagement activities.
- Measure of Success -10% of members to have completed the 'ways to get involved' questionnaire by March 2019.

- Measure of Success - 85% of members to be satisfied with opportunities to participate in management and decision making in STAR survey 2019, compared with the current figure of 81.9%.
- Measure of Success – 65% of members stating they felt valued as an RBH member in the 2019 Member Survey, compared with current figure of 60%.
- Measure of success – For the diversity of engaged members to match that of tenants across diversity strands and employees across teams.
- Measure of success – An increase in the number of proposals for change developed by members, with baseline and targets to be set by June 2017.

4.4 Objective 3 – Decide

To provide a range of ways for members to make decisions

- Measure of Success - An increase in the number and scope of decisions which are made by members, with targets to be set by March 2018. (NB – baseline information not yet available but will be gathered over next six months). Measure of Success - 65% of members stating they understand how they can influence decisions in RBH in the 2019 Member Survey.

4.5 Objective 4 – Evaluate

To equip members to evaluate the impact of decisions made and recommend further improvements

- Measure of success – A 10% increase by April 2020 in the number of members involved in the scrutiny and co-regulation role. Currently 329 members involved in this role.
- Measure of success – A scrutiny panel in place with an agreed programme of activities by march 2018

5 Scope

- 5.1 The tenancy agreement and employee terms and conditions are outside of the scope of this strategy. It is the role of tenants and employees (and the Unions in the case of employee terms and conditions) to influence these contracts and decisions are made through existing agreed decision routes. There is, therefore, no member role to inform, influence, develop or decide on any changes to these contractual arrangements. These issues will be set out in the People Strategy.

- 5.2 The following are outside the scope of this strategy:
- Activity relating to identifying and capacity building tenants to stand for election to our democratic structures is set out in the Membership Strategy
 - Activity relating to communicating with our members will be set out in the Corporate Communications Strategy
 - Activity relating to improving demographic data held about members is set out in the Customer Insight Strategy.

6 Equality & Diversity

- 6.1 The *Services for All Panel* reality checked the Equalities Impact Assessment on 27 October 2016.

7 Monitoring

- 7.1 Monitoring will be carried out annually by the soon to be established engagement subgroup of the Representative Body. Additionally, the engagement activity of members will be summarised in the quarterly membership strategy performance reports to the Representative Body.

8 Review

- 8.1 All RBH strategies, policies, service standards and procedures are reviewed on a regular basis in order to ensure that they are 'fit for purpose' and comply with all relevant legislation and statutory regulations.
- 8.2 This strategy will be reviewed annually in order to ensure its continued appropriateness and formally reviewed and submitted to the appropriate approving body at least once every three years.

9 Thematic Links with other SPSS Documents

- 9.1 This strategy links to the Membership Strategy, Corporate Communications Strategy, the Customer Insight Strategy and the Equality and Diversity Strategy.

10 Action Plan

Ref No.	Obj	Action	Outcome	Lead	Deadline
1	All	Develop an Engagement Policy to implement the strategy	1. Consistent and agreed approach to delivering engagement activities	Jonathan Walton	31 March 2018
2	All	Update PPAMM and SPSS frameworks and training packages to reflect the new strategy.	1. Consistent approach to engagement	Nigel Allan	31 December 2017
3	All	Research and implement best practice to establish creative ways to meet the regulatory requirements in relation to scrutiny and co-regulation.	1. Higher visibility and enhanced reputation across the housing sector 2. Increased levels of members involvement in scrutiny and co-regulation	Jonathan Walton	31 December 2017
4	All	Explore a range of creative engagement methods to encourage engagement across all demographics and diversity strands in all levels of engagement.	1. More use of social media and technology to overcome barriers to engagement 2. Increased confidence that the engagement findings represent the views of all stakeholders 3. To begin to translate expressions of interest into activity and establish a baseline 4. More robust scrutiny and co-regulation	Jonathan Walton	31 March 2018
5	All	Ensure all captured views are held in one place, that the data is regularly cleaned and monitored to be available in a usable format for SPSS document developing.	1. Instantly-accessible, high quality customer, employee and member views, to support strategy and service development.	Jonathan Walton and Gina Tomlinson	Tbc – To be developed as part of the Customer Insight Strategy

Ref No.	Obj	Action	Outcome	Lead	Deadline
6	1	Develop a system to monitor the extent to which those who have shared their views are representative of those to whom the service is relevant	1. Service improvements are informed and influenced by those to whom the service is relevant	Jonathan Walton	31 December 2017
7	1	Explore a mechanism to collate customer feedback and intelligence on service user's views	1. Increase customer experience data available to inform service developments 2. Better understanding of customer perception	Gina Tomlinson	31 March 2018
8	1	Provide informal mechanisms to capture employees' views and develop a structure to respond and take action where appropriate, to create a positive working culture.	1. More opportunities for employees to inform and influence service developments	Elaine Johnson	TBC/to be developed as part of the Employee Engagement Working Group
9	2	Explore options for collective budgeting & resource planning across Membership, Community Partnership, Involvement, Governance and Business Intelligence Teams to achieve shared objectives across different strategies and programmes of work	1. Better use of resources through cross-team working and the delivery of shared objectives	Sarah Robinson and Stephen Wigley	31 December 2017
10	2	10% of members to have logged their areas of interest and preferred engagement methods	1. Better use of resources through effective targeting of engagement	Jonathan Walton	31 March 2019

Ref No.	Obj	Action	Outcome	Lead	Deadline
11	2	Embed and evaluate new approach to member engagement via <i>Neighbourhoods Together</i> action planning process and community grant applications	1. An increase in representative member engagement through <i>Neighbourhoods Together</i> action planning process	Nicky Morris	Embed by March 2018 Evaluate by March 2019
12	2	Review STAR process to ensure it enables a breakdown of member responses	1. Ability to sub-group responses by member/non-member	Gina Tomlinson	As part of STAR procurement 2017
13	2, 3 and 4	Review and evaluate the role of the member decision making and monitoring group, for community project funding	1. Identify opportunities to expand the role of members in making decisions for their neighbourhood	Nicky Morris	31 March 2018
14	2	Encourage more employee member engagement in formal involvement groups	1. Maximise opportunities for tenant members and employee members to work together	Jonathan Walton	To be agreed as part of Engagement Policy
15	2	Develop a system to record and measure the outcomes of member engagement.	1. An increase in the number of proposals for change developed by members 2. A baseline measure established	Jonathan Walton	Baseline established and targets set – June 2017
16	3	Develop criteria to define the scope of member decision-making responsibilities	1. Clarity on the role of members in decision-making 2. Maximising opportunities for member decision making	Sarah Robinson and Stephen Wigley	Criteria in place by March 2018

Ref No.	Obj	Action	Outcome	Lead	Deadline
17	3	Develop mechanisms to support the Representative Body to effectively fulfil their role to ensure that their work and decisions reflect the views of members	1. The Representative Body feel confident that their work and decisions reflect the views of members	Edward Carpenter	To be agreed as part of the Rep Body Effectiveness Review
18	4	Implement the recommendations of the pilot scrutiny project	2. An effective scrutiny panel with trained members 3. More members involved in the scrutiny role through improve promotion of the opportunity to join the panel.	Jonathan Walton	April 2018