

Research into Resident Scrutiny Methods – December 2018, updated January 2019

Executive Summary

Traditionally Resident Scrutiny nationally has been achieved through face-to-face meetings. However the rapid evolution of digital technology provides the opportunity to use social media, online forums and website portals to gather up-to-date data on performance and to communicate. This data can be used by Scrutiny Groups to report to the Housing Provider's management and boards. The benefit of the technology is that it reduces the risk that local issues will be diluted at central level, particularly when a Housing Provider is spread over a large geographical area. It also potentially enables a wider number of residents to be involved.

The research indicates that use of such opportunities is still limited, but is growing. A prevailing view is that it is something that should be developed gradually. This research provides examples of newer approaches being used at some Providers.

The Resident Scrutiny Process itself

Essentially Scrutiny is a critical examination of housing services as offered by the Provider and requires up-to-date performance data and information. The principles for effective scrutiny include independence whereby the scrutiny activities are formally recognised as part of the business model but are separate from the governance and mainstream tenant participation structures (Chartered Institute of Housing (CIH) 2014a). For example Spire Homes (2018) use a Scrutiny Team to advise the Board on performance, whilst the Tenant Scrutiny Group in Newydd Housing Association (NHA) report on issues such as customer services and human resources, as well as tenant issues with repairs, the lettings standard, rent collection, and anti-social behaviour (NHA 2018). Traditionally the process has been based on group meetings and inspections however there is increasing recognition that resident involvement needs to adapt to the alternative ways of engaging residents using digital technology, whilst also ensuring that tenants are not digitally excluded from the process (Optivo 2018).

New methods in Resident Scrutiny

There are specific principles which apply to effective scrutiny including the need for the process to be formal with clear roles and terms of reference, and communication/reporting and the process should empower residents to examine the services and standards offered by the provider and enable the provider to respond by implementing requested measures where possible and explaining those that cannot be implemented (CIH 2014a). The key to all methods in tenant scrutiny is effective and open communication, which can involve the use of panels for different elements of the housing association performance, which then feed into the scrutiny group (Hockey and Morgan 2013). This can be achieved using digital technology. A good example of this process is the Independent Resident Scrutiny Panel in Family Mosaic¹, which is a group of tenants and leaseholders who scrutinise the Housing Provider's services from a resident perspective, and who have reported on the Customer Care Line (CCL), and Noise Nuisance (Family Mosaic 2013).

Optivo (2018) point out that there is a need to adapt to changing needs of the tenant body, providing a mixture of formal and informal options, to increase the number of involved tenant and providing quick participation, which require low commitment and minimal effort to complement the in depth scrutiny process of services. NHA (2018) point out that tenant scrutiny can be enhanced using digital technology such as **social media**, where for example the Scrutiny Group for the housing association **uses live Question & Answer Twitter chat** to promote what they do. Other useful digital methods include **Facebook** which can be used to keep tenants informed of the Scrutiny Group's progress/actions. Other tenants are contacted using **text** and **email** to capture feedback for the scrutiny process.

Tenant Participation in Scrutiny

CIH (2014b) point out that geography and location should not form a barrier to effective communication or the Scrutiny process as Housing Providers can use **customer apps, website portals** and provide access via **Digital TV** and **games consoles**, as well as **Live Chat systems** and **Intelligent Voice Queues**. The Hyde Group (2018) recognise the need to involve all tenants in the scrutiny process and address diverse locational issues by using digital media. For example the Group has developed an **online hub** to provide

¹ Now merged with Peabody

tenants with a forum for discussion, comment and consultation opportunities. This includes **live chat** and **online meetings**, all of which are accessible remotely, and **group discussion boards** to facilitate **group working online**.

Whilst there are clearly technological ways to gather resident feedback and to enhance communication across the scrutiny group/tenant interface, which can be particularly useful when tenants live over a wide geographical area, there is also merit in face-to-face meetings, particularly when the Scrutiny Team needs to put discuss the findings of the Scrutiny evidence and their interpretation of that evidence. This can be facilitated by having a group meeting, as in NHA (2018) which typically funds a group meeting at a central location with expenses and accommodation provided for the Scrutiny Group. The point being that the method of engagement and communication should be designed around the needs and capabilities of the scrutiny group and the tenants. Another housing provider Berneslai have a two-tier approach to Scrutiny, with **local monitoring groups who feed into a central group**, ensuring that local issues are not diluted and that central management are aware of the issues at local provider level (CIH 2014b).

Spire/Longhurst operates over a wide geographical area and has undergone a merger. The arrangements have been merged into one Tenant Scrutiny Panel, with representatives from the now merged housing associations. Each part of the merged organisation has its own support staff. A central performance team provides the Tenant Scrutiny Panel with reports to help them decide on Scrutiny priorities. There is a link with complaints data. Scrutiny methods used are quite typical. Newer approaches used are **Skype**, an **on-line chat zone** and a **'cloud like' facility**. Tenants not involved in the Panel sometimes take on **specific tasks and feed into the Panel**.

Wiltshire Council has stock mostly in the south of Wiltshire, although increasingly further afield. Scrutiny has developed as a **'core and satellite'** arrangement, with residents in the 'satellite' roles undertaking more specialist work, such as research, reporting back to the core group. No particular use of newer technologies are used within the group.

Stockport Homes operates over quite a compact area, and holds fortnightly meetings in their offices, with transport provided. Newer approaches used are **drop box for reading** of documents. A laptop or tablet is provided to residents who do not have one and costs covered.

Thrive Homes, with stock in Hertfordshire and beyond, are well known for innovation in its services. It has an independent Chair for its Scrutiny Panel, which operates in quite a traditional manner. No use of technologies yet.

Clarion Housing Group – the largest Social Housing Provider in the country, undertakes Scrutiny on a regional basis. There is a team of Neighbourhood Inspectors who are available nationally. Clarion uses technology such as **social media** for Scrutiny team members to communicate. They also use **electronic quick to complete opinion gathering** to gather opinions for wider residents, particularly those who are not interested in getting any more involved. They are conscious that they do not want to push the technology too far as they would lose some of their involved residents.

Wrekin Housing Trust are currently carrying out a Systems Thinking Review of Resident Involvement recruitment process. Historically they have carried traditional methods of involvement; this has generated costs for admin (posting letters/documents), taxis and facilitating meetings. Unfortunately with this method of involvement they only seem to be getting tenants of the same demographic wanting to get involved, so they do not really represent the wider community.

Recently they have introduced a **resident portal** to allow them to post notifications, documents onto the portal and allow involved residents to log comments. Unfortunately they have received resistance from the residents even after numerous training sessions aimed at ensuring they know how to use the system.

Until they have completed the review they don't yet know what the recommendations will be, however going forward they would certainly like to advertise the portal to get those out of the area and those in work or without child care to be able to get involved.

Runnymede Borough Council generally stick to a traditional format of residents association meetings, though they do use power point presentations to illustrate current performance. Internally, they have a members' bulletin that councillors receive on what the department is working on. They previously had a newsletter to residents, and are keen to re-establish that in the near future if possible.

The GreenSquare Group in Wiltshire were studied as they have a reputation in Resident Scrutiny that has been nationally acknowledged. Their methods do seem to be quite traditional however, based upon an inquiry approach.

Conclusion

In conclusion the scrutiny process is invaluable as a means of creating greater customer satisfaction with the services offered by housing providers. The advent of digital technology provides an array of ways of engaging and communicating with tenants. The emerging view is that Providers should use a mixture of contemporary and traditional forms of Resident Engagement in the scrutiny process, tailored to the needs of the resident body. These methods should include traditional processes such as face-to-face meetings, along with online forums and group meetings, as well as the use of social media to gather data from tenants for assessment and reporting by the scrutiny group.

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² Now merged with Peabody