

# Customer Engagement Plan 2023-26





# For customers, by customers

In developing this plan:

- We spoke to almost 200 customers about what matters to them,
- The Customer Collective were involved in deciding the key themes; and
- The Customer Partnership reviewed and finalised the plan.





# Introduction: Working together with customers

“Co-production in Health and Social Care is when professionals work with people who access care and support to CHANGE, PLAN, and EVALUATE services.

“It can also be when people who access care and support work with professionals to PLAN their own care.” **Social Care Institute for Excellence**



## Advance's Vision is

“To transform the lives of people with a disability or mental health condition by providing the best quality housing and support services.

“We want to enable our customers to live the lives they choose, achieve their personal goals, feel valued and know their voices are heard.”



At Advance, we believe that customers should have every opportunity to shape the way we design and deliver services.

After all – everything we do should be about enabling customers to live the life they choose. This means we need to hear what our customers are saying, understand what is important to them and adapt our approach in response.

This Plan explains our approach to Customer Engagement for 2023-2026. It sets out how we will:

- Listen to customers and act on their feedback
- Involve customers in making decisions about how we run our services
- Work with customers to enhance their quality of life
- Provide the information that customers need to understand our services and how we are performing

Throughout the period of this plan, we will challenge ourselves not to see Customer Engagement as a niche area of work, but to embed this co-production approach into everything we do.

# Not just a 'nice to do'

Advance believes that putting customers front and centre is the right thing to do. But it's not just something that is 'nice to do': it is also something we 'must do'.

Both the Regulator of Social Housing and the Care Quality Commission (CQC) require us to invest in involving our customers.



The CQC says that:

We should get feedback from customers and their circles of support (families, friends and other professionals), and that customers must be involved in planning and reviewing their support, including setting their own goals. This is often called 'person centred support'.

The Regulator of Social Housing through its new 'Consumer Standard' says that:

Customers should be given choice and chances to provide feedback, have influence and be involved.

They have set out a range of Tenant Satisfaction Measures which aim to measure how customers feel about the services their landlord provides, including whether they feel their landlord listens and takes their views on board.

# What customers want

In developing this plan, we spoke to lots of customers about what is important to them and what they want Advance to focus on.

Customers told us loud and clear that they want to be involved. They want to have a say, to be active in their own lives and to have a sense of purpose.

They offered some key challenges to us, which we will consider in our approach to Customer Engagement ... and everything we do.

## The challenge from our customers



Treat us as individual people.



Differentiate your approach – i.e. change the way you do things to suit my needs.



Don't patronise, stigmatise or pigeon-hole me.



If you say you will do something, please do it.

From customers' feedback, we have identified four key themes under which customers' priorities sit.

These themes have been woven into our Customer Engagement Plan.



# The four themes



## 1. Being part of my community

Customers talked about loneliness and feeling isolated. They want to form social connections – within their immediate community (for example if they live in a housing scheme), or in the wider community.

Customers want to develop friendships and relationships.

They want opportunities to dance, sing and have fun.



## 2. Developing my skills

Some of our customers are keen to look for work.

They talked about developing their IT skills so they could access services online, or opportunities to connect and socialise.

Many customers have skills and talents they would like to share.

Lots of customers talk about the importance of having a purpose.



## 3. Improving my health and wellbeing

Customers spoke about healthy eating and getting into the outdoors.

They spoke about maintaining their physical health and their mental wellbeing.

Some are finding it more difficult to access health and care services than it used to be.



#### 4. Staying safe

Customers spoke about the importance of feeling safe: safe in their home, in their community and online.



# Customer Engagement Plan

**Our plan is split into four areas of work.**

1. Listening to customers and acting on their feedback
2. Involving customers in making decisions about how we run our services
3. Working with customers to enhance their quality of life
4. Providing the information that customers need to understand our services and how we are performing

In each of these areas, we have set out the key actions and activities we will undertake between 2023-2026.

## 1. Listening to customers and acting on their feedback

We will take an active approach to gather, respond to and learn from customers' feedback. We recognise that our customers are all different. We will work hard to introduce a variety of different ways to gather feedback, so that we can capture as many views from as many people as possible.

**The key ways we will do this:**

**Surveys.** This includes the annual Customer Satisfaction Surveys for housing and support customers, and the more frequent pulse surveys we carry out (e.g. following a repair, or complaint, or when we visit customers.) We will publish the results of the surveys, and the service improvement plans which result from them.

During this period, we will review the way we carry out the survey in housing (it is currently a postal survey with the option of completing online) and we will review the question set and methodology of the Support Customer survey.

**Focus groups.** We will check the quality of the information we get back through surveys by collecting more qualitative data through focus groups and conversations with individual customers.

In particular, this will be helpful in Housing, where we are restricted by the Regulator to the questions we are able to ask.

**Complaints.** We will make sure customers understand how to complain and welcome feedback via complaints. We will publish a report about the key things that customers have complained about and the way we have responded each year on our website and in the annual report to customers.

**Person centred planning.** Every Advance Support customer will have the opportunity to influence the way their support is planned and delivered on an ongoing basis through their annual review.

**Housing Officer Visits.** Every housing customer will receive an annual visit from their housing officer where they can discuss the service they receive as an individual and raise any issues or concerns.

**Informal feedback.** We will gather and record Customers' feedback at events, visits, through the Customer Collective and from our day-to-day interactions with customers.



## 2. Involving customers in making decisions about how we run our services

We will provide various opportunities for customers to get involved and enabling more customers to feedback on Advance's performance and plans by introducing more 'in person' meetings different locations across the country..

In addition, whenever we review customer facing policies or processes, we will we always capture customer viewpoints and ensure these are fed into the process.

### The key ways we will do this:

**Customer Partnership.** The Partnership is a group of customers who meet quarterly to represent the wider customer group. They check Advance's performance, input into decision making and report their findings to the Board. We will be expanding the number of customers who can get involved by introducing more 'in-person' Partnership Committee meetings across the country.

**Shared Owners Forum.** We will introduce a dedicated forum to support Shared Owners through the HOLD scheme.

**House meetings.** Customers living in shared accommodation told us how much they valued the opportunity to have house meetings, but in many areas, these stopped during Covid-19. We will aim to re-introduce these where possible.

**Co-production project groups.** We will work together with customers to look at particular topics or areas of interest in more detail. For example, reviewing the way Advance carries out repairs, or the way Advance communicates with customers.

**Recruitment panels.** We will involve customers in the recruitment of colleagues and Board members.

**Peer reviewers / Tenant inspectors.** We will put in place a network of customers who can get feedback from customers and check on the quality of our services.

**Person centred planning.** At an individual level, every Support customer will have the opportunity to input into the way their support is planned and delivered. Where desired, families or other members of customers' circles of support will be involved in this process.



### 3. Working with customers to improve their quality of life

We want to do more than simply provide homes and support services. We want to 'Transform lives'. Under the four themes that customers have identified – Part of my Community, Developing my skills, Improving my Health and Wellbeing, and Staying Safe – we will aim to support a range of 'added value' activities with customers, working with them to improve their quality of life.

#### The key ways we will do this:

**The Customer Collective.** An informal group for all customers, the Collective meets online every month for social evenings and information sessions. The Collective also has a facebook group which we will continue to promote and grow, and we will aim to hold in-person Collective events during the period of this plan.

**Customer events and projects.** For example, projects to improve communal or garden spaces with customers, support for social events, parties and trips, and competitions. We will aim to secure additional funding for these events where possible.

**Signposting and building links.** We will build links with local services to expand the support and opportunities on offer to customers.

**Information campaigns.** We will provide regular information and campaigns that support the interests of customers and encourage customers to get involved in regular awareness raising days and events. This might include things like Cost of Living information and advice, staying safe online, or looking after your home.

**Core Support.** We will support customers to identify and achieve their goals through their day-to-day support.







## 4. Providing Information

We will work to provide the right kind of information to our customers so that they can understand our services and what they can expect from us. We will provide information in a way that is clear and accessible and in a range of formats, and we will provide opportunities for Customers to engage with us via our various communication channels.

### The key ways we will do this:

**Advance website and Social Media Channels.** We will provide useful information about Advance and our services on our website, as well as information about how we are performing. During the period of this plan, we will create a new customer section on the website making it easier for customers to find information for them. We will also review the 'My Advance' customer portal and work to encourage more customers to access their tenancy information online.

We will create opportunities for customers to engage with us on social media and we will share customer stories and successes across our various platforms.

**Customer information packs.** We will provide detailed information relating to the housing and support services we provide to individual customers in the form of a customer information pack. This will be regularly reviewed and updated.

**Letters.** We often need to write to our customers. We will continuously review the way we do this, including the language we use, to make sure these are as accessible as possible for customers. We will provide letters and other communications in easy-read format when requested.

**Performance reporting.** We will publish regular reports about how Advance is performing on our website for customers to view. We will also publish an annual report to customers which will report performance, including customer satisfaction, operational performance and an overview of complaints and how we have responded to them.

# Measuring success

We have set ourselves some key Performance Indicators which will help us check that we are achieving our Goals.

We will report on progress against the Customer Engagement Plan in the Annual Report to Customers, which will be published in September.

| Measure  |                        | Current            | 2025 | 2026 |
|--|------------------------|--------------------|------|------|
| Increase the number of people involved:  | Number regular members |                    |      |      |
| In the Customer Partnership  |                        | 5                  | 10   | 10   |
| In the Customer Collective   |                        | 9                  | 50   | 50   |
| Increase the number of customers engaged with Advance (outside core service delivery)* | Number of individuals  | Establish baseline |      |      |
| Customers feel that Advance listens to their views and acts upon them.                 | Annual Survey          |                    |      |      |
|  | Housing                | 66%                | 70%  | 75%  |
|  | Support                | (96%)**            |      |      |
| Customers responding the Annual Satisfaction Survey                                    | Housing                | 25%                |      |      |
|  | Support                | 47.3%              |      |      |
| Customers happy with how their complaint has been handled.                             | Pulse surveys          | 54%                | 72%  | 72%  |
| Support customers have their Support plans reviewed each year.                         | Corporate KPI          |                    | 95%  | 95%  |
| Support customers achieve their goals (measure to be in place by yr.3)                 | To be developed        | Establish baseline |      |      |

\* For example, attendance at events, involvement in activities, co-regulation activity, etc.

\*\*New question for Support customers. Benchmark created using 'Does Advance help you to live the life you choose?'



# Detailed action plan

| Customer Feedback                                 |   |                                    |
|---|---|------------------------------------|
| Annual Customer Satisfaction Survey – Support     | Carry out the annual Support customer satisfaction survey.  | February 2024, 25, 26              |
|   | Review results, develop service improvement plan and communicate to customers.  | April 2024                         |
|   | Review the survey – questions and methodology (see involvement).  | 2024-2025                          |
|   | Carry out updated survey.   | February 2025, 26                  |
| Annual Customer Satisfaction Survey – Housing     | Review Housing Customer Survey method.  | April 2024                         |
|   | Carry out the annual Housing Customer Satisfaction Survey.  | May 2024, 25                       |
|   | Review results, develop service improvement plan and communicate to customers.  | July 2024, 25                      |
| Pulse surveys                                     | Carry out surveys following repairs and report on quarterly basis.  | Ongoing                            |
|   | Review how these are undertaken.  | April 2024                         |
|   | Carry out complaint handling survey following a complaint and report on quarterly basis.  | Ongoing                            |
| Focus groups                                      | As part of the Annual Satisfaction Survey process, hold a number of focus groups (these may be small groups or one to one conversations) to get more qualitative information. | March 2024, 25, 26<br>May 2024, 25 |
| ‘Have your say’ days                              | Hold at least 3 ‘Have your say’ days (visits from Chief Executive/ SLT members) per year.   |                                    |
| Complaints  | Reflect changes to the complaints handling code in customer communications.   | April 2024                         |
|   | Increase the visibility of information about how to give feedback via complaints and compliments.   |                                    |
|   | Publish an annual complaints report (include in the annual report to customers)   | Sep 2024, 25                       |
| Person centred support and housing officer visits | Update involvement form.  | April 2024                         |

## Involving customers

|                                      |  |                                    |
|--------------------------------------|--|------------------------------------|
| Customer Partnership                 | <p>Hold quarterly meetings in various locations around the country.</p> <p>Develop 'Core Group' and hold regular meetings online.</p> <p>Embed changes to partnership, establish core group, new approach to meetings in different areas across the country and provide regular report to the Board.</p> | <p>Quarterly</p> <p>March 2025</p> |
| Shared Owners forum                  | Establish a forum for Shared Owners  | December 2024                      |
| House meetings                       | <p>Reintroduce regular house meetings in support and housing schemes where possible.</p> <p>Create a standard format for capturing feedback from these meetings.</p>   | March 2026                         |
| Recruitment panels                   | <p>Continue to involve customers in recruitment of senior staff and board members.</p> <p>Ensure customers are involved in recruitment of operational roles wherever possible.</p> <p>Develop the way this is recorded and ensure we are able to report numbers.</p>                                     | <p>Ongoing</p> <p>March 2025</p>   |
| Co-production projects               | Work with customers to develop a programme of co-production projects to run each year.   | April 2024, 25                     |
| Peer Reviewers and Tenant inspectors | <p>Establish network of customers who can act as peer reviewers and tenant inspectors.</p> <p>Develop and deliver training.</p>  | March 2026                         |





## Working with customers to improve their quality of life

|                              |  |                       |
|------------------------------|--|-----------------------|
| Customer Collective          | Develop and publicise annual programme of Collective meetings based on key themes and linking with awareness days.   | December 2023, 24, 25 |
|                              | Develop the Collective Facebook group.   | March 2025            |
|                              | Develop approach to in-person Collective events.   |                       |
| Customer events and projects | <p>Develop an annual programme of added value activities and events, linking in with key themes, including EDI themes.</p> <p>(2024 events:</p> <p>Launch 'Just add water' gardening competition (link in with Housing outreach worker led initiatives</p> <p>Deliver 50th Birthday activities</p> <p>Explore opportunities for customer-led awareness raising project)</p> <p>Develop methods for capturing and recording added value activity and its impact on customers.</p> | January 2024, 25      |

## Providing information

|   |  |                        |
|---|--|------------------------|
| Advance website                           | Establish performance area on the website and publish regular performance information.   | September 2024         |
|   | Develop new customer area and improve information to support customers.  | December 2024          |
| Customer newsletter                       | Deliver a quarterly newsletter.  | Quarterly              |
|   | Review and develop the newsletter with input from customers.   | March 2026             |
| Annual Report to customers                | Produce annual report. (Including progress against Tenant Satisfaction Measures/ transparency around Director's remuneration/ complaints performance). | September 2024, 25, 26 |
| Customer information packs                | Review and update annually.  | March 2024, 25, 26     |
| Letters and high frequency communications | Review customer communication. (co-production project)   | March 2025             |
|   | Develop and deliver communication training for colleagues.   | April 2024             |

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