

Perth and Kinross Council

Tenant and Resident Participation Strategy

2018-21

Developed by

The Service User Review and Evaluation Team



Forward by Cllr Peter Barret, Convenor Housing and Communities

The Tenant and Resident Participation Strategy 2018-21 represents a first for Perth & Kinross Council and its tenants – it has been written and developed by tenants from our Service User Review and Evaluation (SURE) Team in consultation with the wider tenant body.

This new approach has given our tenants a unique opportunity to develop a Strategy that truly reflects their views and aspirations. The new Strategy has been developed from recommendations from the SURE Team's recent scrutiny of the Council's tenant participation activities. One of those recommendations was that tenants themselves should develop and write the Tenant participation Strategy.

The new Strategy they have produced will build on the achievements and successes of the last strategy in relation to tenant-led scrutiny and the involvement of tenants and service users in decision making.

One very important aspect of the Strategy is to encourage the wider involvement of many more tenants and residents at a local level, and to support the greater involvement of local housing staff in engagement activities. We want to engage with as many tenants and residents as we can, and we hope to achieve this by introducing a more locality-based approach to participation, speaking to people in their local communities.

This is the first time Perth and Kinross Council have asked a tenant-led group to scrutinise tenant participation activities and to develop a draft Tenant and Resident Participation strategy based on the evidence and recommendations of tenants. This strategy has been tenant-driven and tenant-led, and this is the principle that will guide all our Tenant and Resident Participation work over the next three years.

I'd like to thank the SURE Team for all their hard work in producing this important document, and also every tenant who has taken the time to help shape and develop the new Strategy.

I'm sure it will help us continue to improve and innovate when it comes to engaging and working closely in partnership with our tenants and residents.

Councillor Peter Barret

Convenor, Housing and Communities



This strategy was prepared for Perth and Kinross Council by PKC Service User Review and Evaluation (SURE) Team members

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The SURE Team was supported in its work on this strategy by its Independent Advisors PS Consultants (Christine Bailey and Steve Sharples)

Section 1 Background to this Strategy

1.1 Introduction

This is Perth and Kinross Council's 'Tenant and Resident Participation (TRP) Strategy' for the period 2017-2020. It replaces the 2014-2017 Strategy adopted by the Council in March 2014.

Tenant participation across the Perth and Kinross Council area has traditionally been planned, and successfully delivered, mainly by a centrally based specialist team of Tenant Participation staff based in Housing Services in Pullar House. We recognise the need to retain a central focus to, and an overview of, tenant and resident participation. However, this new strategy has been designed to respond to changes in the way we manage our approximately 7,500 council homes that have happened during the lifetime of the previous TP Strategy. The most notable change, made in 2015 /16, has been the restructuring of the Housing Management Service into four Area or Locality teams: City Central, Letham and Hillyland; Perth North and Perth South.

1.2 What is in this Strategy?

This strategy document has four sections:

Section 1 The Background to the Strategy

This explains: how the strategy was produced; gives our overall 'vision' for what we want the strategy to achieve, and says what we mean by 'tenant and resident participation'.

Section 2 The Regulatory, Legislative, and Policy Context

Every council strategy has to be consistent with what is required of us by law and regulation. This second section tells you: what the **Scottish Housing Regulator** requires us to do with regard to tenant and resident participation; the nature of the four legal requirements in respect of tenant and resident participation; and how this strategy fits with other council strategies.

Section 3 Key Principles

In this section we set out our key principles in respect of delivering successful tenant and resident participation.

Section 4 Our objectives for the next three years

The final section sets out what we aim to achieve over the next three years. There are fourteen strategic objectives that we will deliver.

There are 3 Appendices:

Appendix 1 How well do we do 'tenant and resident participation' at the moment?

This section tells you what the scrutiny exercise on tenant and resident participation undertaken by our tenant-led SURE Team told us about how well we currently deliver tenant and resident participation. It sets out what that independent evaluation found to be our strengths and weaknesses, and what it saw as the opportunities and threats that may lie ahead.

Appendix 2 The specific recommendations of the SURE Team in their Scrutiny Report of February 2017 – all of which were accepted by the Housing Management Team

Appendix 3 Guidelines on ‘How to Make Meetings Work Well’ to facilitate staff and participants working together in Groups to deliver the TRP Strategy

1.3 How was this Strategy produced?

There was significant input from tenants and housing service users at several stages in the discussion and shaping of the new three year TRP Strategy for 2017-2020:

- The starting point was a detailed review, by our tenant scrutiny body, the ‘Service User Review and Evaluation (SURE) Team. They evaluated how well Perth and Kinross Council’s policies and practices on tenant participation were working. (Appendix 1) This ran from October 2016 until February 2017. The SURE Team’s report was presented for discussion to the Council’s Housing Management Team on 20 February 2017 and to Perth and Kinross Council’s Tenant Participation Forum on March 23rd 2017.
- The Housing Management Team responded on April 3rd 2017 to the SURE Team’s Report with an Action Plan. The Council’s Action Plan for Tenant and Resident Participation responds directly to each of the recommendations in the SURE Team’s Scrutiny Report. The SURE Team’s recommendations are in **Appendix 1**.
- The Action Plan agreed with all of the SURE Team’s recommendations, and specifically that a major emphasis for the next three year Strategy should be on the development of tenant and resident participation in each of the four Housing Management Area or Locality teams. This will require greater involvement of area housing staff to sit alongside our continuing support for strategic (Perth-wide) TRP activities which will continue to be delivered through the centrally based, specialist Customer and Community Engagement Team.
- The Council’s Housing Management Team also agreed with the SURE Team’s recommendation for the further development of a diverse TRP ‘menu’ of opportunities to be practically supported by staff in the Customer and Community Engagement Team and with training for area based housing officers.

- The SURE Team then prepared an initial draft of the TRP Strategy for consultation with the Tenant Participation Forum on June 8th 2017.
- A revised draft of the proposed TRP Strategy was further developed by the SURE Team for discussion by senior Housing Managers in July - August 2017.
- The document presented to Council is the final outcome of this process.

1.4 Tenant and Resident Participation: Our Vision and Definition

Both the Sure Team and the TP Forum told us that our **vision** of tenant participation, set out in the previous strategy was the correct one, and should be retained as:

“Supporting people to get involved in matters that are important to them and their neighbourhoods, building relationships with staff, and building bridges in communities”

The SURE Team thought that we ought to go further and give a formal **definition** of what we mean by ‘tenant and resident participation’. We see it as:

“The processes and structures by means of which all PKC tenants and service users have the opportunity to influence both the setting of policies for council housing services and the nature of service delivery for council housing in each *locality area and district-wide* and, with other residents, to be involved in estate, neighbourhood and community issues.

We expect the overall objectives or outcomes of this TRP Strategy will be the realisation of:

- Real opportunities to shape the communities in which people live
- Building links with PKC staff and amongst residents
- Developing skills, understanding, self-confidence and working together, and
- Creating self-help and support networks in those communities.

Section 2 The Regulatory, Legislative, and Policy Context

The Policy Context

2.1 What do we mean by ‘Tenant and Resident Participation’?

There has been much debate over the years about how to define and understand the nature of what initially was called ‘tenant participation’. The term itself has its origins in the 1950’s. There have been many subsequent attempts to re-brand it.

In some cases this meant substituting ‘**involvement**’ for ‘participation’, and more recently, either ‘**engagement**’ or the more radical term ‘**empowerment**’ have sometimes been used instead of participation.

Some landlords have preferred to replace the word ‘tenant’ with ‘**resident**’ to better express its application to what (as a result of Right-to-Buy) have become multi-tenure social housing areas.

Others, and particularly Housing Associations have chosen to use the word ‘**customer**’ to emphasise the nature of the consumer / supplier relationship that exists between tenant and landlord. We think the term ‘customer’ seems to narrow down the potential scope of the discussion and participation, into a more limited expression of choice or preferences.

The term ‘Tenant Participation’ reminds us that when it comes to matters of Council housing service delivery only tenants are entitled to be involved with housing staff in this debate *and* that it is paid for primarily from the Housing Revenue Account, or in large part the rents that council tenants pay.

Having discussed this with the SURE Team and the TP Forum, we agreed that ‘**Tenant and Resident Participation**’ or **TRP** is the best term to use for the next three years. We believe it is a broad enough term to include two types of participation activities:

- a. Work specifically with **council tenants and service users to discuss housing service delivery** in each Locality team or strategically across the district, and
- b. Work with **all residents**, irrespective of housing tenure, in each of the four Localities, and in neighbourhoods and estates, where residents can meet, talk and work together to improve their community and the areas in which they live.

2.2 The Legislative and Regulatory Background to Tenant Participation

For many years it has been accepted that to widen the scope of tenant and resident participation, a landlord needs to offer what is called a ‘**menu of participation opportunities**’. This must give a range of diverse ways in which tenants, housing service users and residents can appropriately be involved in improving housing service delivery and their neighbourhoods in ways which suit them.

The landlord must also comply with the most relevant legislative and regulatory requirements in respect of tenant participation. These are the:

- **Sections 53 and 54 of the 2001 Housing Scotland Act** (and the 2002 SEDD circular 7/2002 consequent upon the Act);
- **2012 Scottish Social Housing Charter** (consequent upon the 2010 Housing (Scotland) Act; and,
- **2015 Community Empowerment (Scotland) Bill** (passed in 2014 but only receiving Royal Assent in 2015).

2.2.1 The 2001 Act and SEDD circular 7/2002

The requirements for tenant participation in the 2001 Housing Act were strongly influenced by the provisions of the National Strategy for Tenant Participation (**'Partners in Participation'**) that had been published in 1999. The SEDD Circular 7/2002 provided guidance on the implementation of Part 2 (Chapter 3) of the 2001 Act, in which those requirements were set out.

Section 53 of the Act set out two principal duties on social **landlords** to:

- a. **Prepare a tenant participation strategy** aimed at achieving continuous improvement in services consistent with best value principles which would be prepared and developed in consultation with tenants, and
- b. Give what were called 'tenant associations' a formal status as **'Registered Tenant Organisations' (RTOs)** and required landlords to **set up and maintain a register** of such RTOs.

Section 54 of the Act gave guidance on how tenants generally, and RTOs in particular, were to be consulted on: policies in relation to management, maintenance, and repair of council homes; service standards; the tenant participation strategy; and propose disposal of land or other assets.

Over time the emphasis on tenants working together in groups has shifted to reflect a more modern approach where flexible, less formal methods of participation are offered to reflect changes in society and the availability of new technologies. This is called a 'menu' approach to tenant participation.

- **Housing (Scotland) Act 2010**

The introduction of the Scottish Social Housing Charter through the Housing (Scotland) Act requires Perth and Kinross Council (PKC) to report to the Scottish Housing Regulator annually on the achievement of the Charter Outcomes. The Tenant and Resident Participation Strategy will support this across a number of outcomes, especially Equalities, Communication and Participation.

- **The 2012 Scottish Social Housing Charter (SSHC)**

The SSHC, whose provisions are monitored by the Scottish Housing Regulator (SHR), contains only one ‘outcome’ measure for Tenant Participation amongst its suite of 16 outcomes. This single outcome is **Charter Outcome 3**. It requires that:

‘Social landlords manage their businesses so that: tenants and other customers find it easy to participate in and influence their landlord’s decisions at a level they feel comfortable with.’

This is clearly consistent with the ‘menu’ approach.

‘This outcome describes what landlords should achieve by meeting their statutory duties on tenant participation. It covers how social landlords gather and take account of the views and priorities of their tenants; how they shape their services to reflect these views; and how they help tenants and other customers to become more capable of involvement’ (SSHC 2012 p6)

2.2.3 New Opportunities created by the Community Empowerment Act (TP Report 2.2.3)

The 2015 Community Empowerment (Scotland) Act – CESA

The most recent piece of relevant legislation affecting tenant and resident participation is the Community Empowerment (**Scotland**) Act 2015. This has the potential to be the most radical legislative framework that will intersect with tenant and resident participation systems and structures.

In essence the CESA ‘sets out a plan for empowering the people of Scotland. This means that everyone can get involved and help make important decisions’ (Scottish Govt. Policy Memorandum 2014 p 2).

There are four sections that we think are relevant to tenants and residents (working collectively) in their local communities. Each sets out rights (not just requests) for individual and groups working in their communities to influence decisions in respect of land, buildings and policies that shape their neighbourhoods. These are:

- **Part 1 Community Planning**
- **Part 2 Participation Requests**
- **Part 3 Community Rights to Land**
- **Part 4 Asset Transfer Requests**

These rights potentially:

- Fit well with a much greater emphasis on delivering tenant participation in local communities (and by local housing teams) and the recent restructuring of Housing Management service delivery into four Locality or Area teams, and
- Will be researched by the Housing Service to develop links with other council policies and will gradually be promoted /offered to tenants through the Housing Service integrated with wider locality based service planning and delivery.

2.4. Links with other PKC strategies

This Statement complements, and is consistent with, other Perth and Kinross Council Plans and Strategies including:

- Perth and Kinross Council Community Plan /SOA 2013-2023
- Perth and Kinross Local Housing Strategy
- Housing and Communities Business Management and Improvement Plans
- Scottish Housing Quality Standard (SHQS) Delivery Plan

The Perth and Kinross Health and Social Care Partnership Strategic Plan

The **Perth and Kinross Community Plan and Single Outcome Agreement** key objectives are

- Giving every child the best start in life
- Developing educated, responsible and informed citizens
- Promoting a prosperous, inclusive and sustainable economy
- Supporting people to lead independent, healthy and active lives
- Creating a safe and sustainable place for the future

This Tenant and Resident Participation Strategy will play an important and integral role in the Council's priorities. The objectives and actions identified in this Strategy support the Council's priorities, particularly around improving housing, social inclusion, community regeneration, improving health and wellbeing, community safety and stimulating the economy.

Section 3 Key Principles

3.1 Our Principles of Participation

As with the previous strategy , our principles of tenant and resident participation reflect those of the Scottish Government’s National Strategy for Participation, ‘Partners in Participation’. These include:

- Creating a culture of mutual trust, respect and partnership between tenants, elected members and housing officers at all levels, working together towards improving housing conditions and housing services
- Ensuring tenant participation is a continuous process
- Enabling a joint process of agenda setting and information sharing
- Enabling processes of decision making that are open, clear and accountable
- Recognising that tenant representatives should be given enough time to consider the issues properly and work out a common view in advance of meeting Council representatives
- Recognising the independence of tenants’ organisations
- Developing good working relationships that are flexible and adapted to local circumstances
- Recognising that tenants’ organisations require adequate resources for organisation, training and support
- Tailoring tenant participation in remote areas to suit the particular needs of tenants in these communities
- Providing all tenants with an equal opportunity to contribute, removing barriers to effective participation.

3.2 Equalities *(From TP Strategy 2014-17)*

There are a range of legislation and policy developments which require public bodies to deliver their services in a way which promotes equality and is not discriminatory. The planning and delivery of good quality housing; appropriate information; advice; and care and support services in Perth and Kinross embrace the principle of equal opportunities.

Perth and Kinross Council’s Housing and Community Service dedicated equalities action plan which sets out a detailed list of actions which for each of seven equality strands aims to:

- Tackle discrimination and harassment directed against minority groups.
- Promote equality of opportunities for minority groups.
- Promote positive attitudes towards minority groups.
- Encourage participation in public life by minority groups.
- Endeavour to meet the needs of our service users who may be a member of a minority group.

The Tenant Participation Strategy, as part of the Local Housing Strategy (LHS), will undergo an equality impact assessment to review the effects of the Strategy. The LHS plays a significant role in promoting the equalities agenda and demonstrates that significant investment is being undertaken in housing for people with particular needs (e.g. older people), as well as addressing the needs of a range of individuals for community care whether they are part of planned discharge or remodelling programmes or currently live in unsuitable housing in the community.

Perth and Kinross Council Housing and Community Care Service's Equalities Action Plan aims to ensure that all services, including this Strategy and related actions, take positive steps towards the equalities agenda. This means that the Council will strive to encourage equal opportunities and diversity, responding to the different needs and service requirements of people regardless of gender, race, colour, disability, age, nationality, marital status, ethnic origin, religion or belief, sexual orientation or gender re-assignment.

In order to help remove barriers from tenants participating, we can provide help in the following ways:

- Travel expenses and transport provision
- Carers' allowance to help towards paying someone else to provide care while they attend a tenant participation activity
- Information in alternative formats or languages
- Accessible venues for events
- A hearing loop system at meetings and events for people who use hearing aids
- A variety of meeting times

3.3 Making TRP group meetings work well

TRP is about encouraging and practically supporting tenants, housing service users and local residents to work together well, and with Housing Officers, external advisers, partner agencies and other organisations to further their aims and interests. Some Groups will operate informally, with no commitment to attend on a regular basis. Others will rely upon regular attendance to agree key decisions and to achieve specific outcomes. Flexibility and appropriate interpretation of the guidelines proposed will be required.

Well-run meetings, with a clear purpose, can achieve a lot and encourage support and enthusiasm for a TRP project. Poorly run meetings can have the opposite effect. Success is often linked with time spent in preparation and planning before the meeting takes place.

Appendix 2 sets out some good practice guidelines to show how to make meetings work well and the roles required for success at both district-wide and at Locality team levels. The aim is to encourage tenants, housing service users and residents to take part, to be clear about the purpose of each meeting and/or the process they are involved in, to hear what is being said, to join in discussion, to express their views, to help meetings run smoothly, and then to support effective follow-up actions.

Timely and clear feedback and follow-up actions help staff and participants to know what has been agreed, who will do what and by when, and form the basis for the next meeting agenda, when progress can be discussed.

3.4 The Role for Housing, TRP officers or External Advisers

They should:

- Set the scene for the participation initiative/process tenants, housing service users or residents are invited to be involved in, define the purpose of each meeting and/or prepare an Agenda (if led by the Housing Service), support participants to lead/ manage the meeting(s) themselves, and advise and facilitate TRP meetings as required
- Advertise and promote individual TRP meetings/the overall TRP initiative
- Encourage and help participants to use the simple guidelines set out in Appendix 2 to get the most from every opportunity to meet together. These guidelines should be explained to those joining in TRP activities for the first time and agreed with all participants
- Aim to achieve a balance between being 'business-like' and achieving the TRP aims and outcomes proposed, and creating an informal and friendly atmosphere. Appropriate terms of Reference can be discussed and agreed for each TRP group/initiative
- Ensure meeting notes are taken and be responsible for feedback to participants in a timely and clear way, with details of decisions made, follow-up actions agreed, the next steps and/or dates of further meetings. Each Group should make sure a participant or Housing Officer agrees to take notes
- Ensure actions agreed, targets for the next meeting, individual follow-up actions agreed are set out and circulated to all participants as soon as

possible to enable progress to be made in between TRP meetings. Officers will need to support and assist

- Participants should be encouraged and supported to set the 'tone' of their meetings.
- The Chair of each TRP Group may exclude any participant from a meeting who after being asked is not respecting these agreed procedures as a founding principle of the TRP 2017-2020 and/or the Group as a whole may agree to such action.

3.5 TRP Specific Terms of Reference or Code of Conduct

Some Groups, such as the Service Users Review and Evaluation Team (SURE) Team have their own specific Codes of Conduct which their members have agreed to abide by. The SURE Team Code of Conduct goes well beyond these more general guidelines on making meetings work well to include issues such as handling confidential or commercially sensitive information and the expectations of behaviour of their members.

Other TRP groups can prepare and agree their own Terms of Reference and /or Codes of Conduct appropriate to their role and objectives, with advice or support from the Housing Service. Once agreed, this is the basis for how that Group will operate. It will need to be explained to new members. It will apply to all Group members.

3.6 Training and Support

Advice, training and support on all aspects of TRP roles and responsibilities, of making meetings work well, how to plan and to deliver a project can be provided by the Customer and Community Engagement team for both staff and tenants. Joint training can help to initiate new projects, to foster understanding and to develop good working relationships.

3.7 Annual Calendar of the main TRP activities and the TRP menu available

The SURE Team recommended that the Housing Service prepare with tenants an annual Calendar to give information on the TRP menu of opportunities that are available to contain at least one key TRP event in each Locality Team and district-wide. This will give advance notice of key dates and a longer lead-in time for joint planning of these key TRP events.

Section 4 Our objectives for the next three years

Introduction

We want to build on what has been achieved in the last three years and to implement the key recommendations which the SURE Team's Scrutiny Report gave us. This Section sets out the broad objectives and the key outcomes we want to achieve over the next three years.

Our Key Outcomes

Our key outcomes which will help shape and form our TRP Strategy Action Plan 2017-20 are:

1. Deliver a menu of participation opportunities, reflecting local and personal circumstances enabling all people to be involved effectively and at a level they feel comfortable with.
2. Undertake an agreed programme of strategic consultation and scrutiny activities with people who use our services
3. Ensure all tenants, staff and all other people who use our services, will be given access to adequate levels of training and support that will enable them to participate more effectively.
4. Continuously develop ways of improving communication and information sharing to meet the needs of all.
5. Regularly monitor and review this strategy to ensure it continues to be effective and demonstrates the impact of tenant involvement.

Our Key Objectives

Our key objectives for our TRP Strategy 2017-2020 are these:

Objective 1 Achieving the right balance between Strategic and Local TRP Activities

The Housing Service now operates in four Locality or neighbourhood teams: City Central, Letham and Hillyland, Perth North and Perth South. Each differs in terms of concentrations of housing stock and tenant households: City Central and Letham and Hillyland have the more dense concentrations, but there are also some very rural, dispersed populations in both the North and South area teams. The Housing Service will work to get the right balance between tenant and resident participation activities delivered centrally and in each Housing Management area.

Objective 2 Further developing our 'menu' approach to tenant and resident

We will continue to develop the 'menu' approach, with a strong emphasis on the development of local TRP activities. We know locally delivered TRP is likely to be more accessible and better supported than most district-wide TRP activities, and tenants are keen to have opportunities which offer social interaction. The SURE Team recommended that as a minimum each Housing Office could be a base from which to carry out local TRP activities. We will work to make this happen.

Light Touch

- Complete our surveys
- Come to a Conference or local event
- Like our Facebook Page
- Follow us on Twitter
- Sign up to our interested person list

Take an interest

- Attend your local Registered Tenant Organisation meetings
- Attend the Tenant Forum
- Take part in a Estate Based Initiative walkabout
- Attend a Resident Academy
- Take part in local events and groups

Get Involved

- Join a local Registered Tenant Organisation
- Take part in a tenant working group
- Help make Estate Based Initiative decisions
- Become a member of the SURE Team
- Join the Tenant Participation Strategy Monitoring Group
- Sign up to become digitally included

Objective 3 Taking advantage of opportunities granted in the Community Empowerment (Scotland) Act

The opportunities offered to the further development of tenant and resident participation by the Community Empowerment (Scotland) Act are summarised in **Section 2**. We intend to use those opportunities to further develop tenant and resident participation within each of our four management areas.

This will require the Housing and Community Safety Service to work with other council departments jointly to develop such things as 'Locality Agendas'. We have already begun this kind of work and current examples include:

- Muirton in Bloom

- The Loons Brae Partnership - where tenants had support from our TRP support team and from a council capacity worker from the hub at Blairgowrie
- And, the Letham Community Hub, where senior Housing Services staff lead a pilot local consultation to develop a future strategy to deliver integrated care, health and housing outputs.

Over the next three years we will work to support such 'Locality Agendas' by, for example:

- Identifying community neighbourhood issues which jointly affect both council tenants and other local residents
- Exploring new methods of delivery of, and standards for, housing and other services (with a focus on council housing)
- Supporting tenants to play a full part in discussions around proposals which involve: major changes in land use; proposed investment in new homes and infrastructure; where a major planning application might impact on the neighbourhood; or where the community want to negotiate to manage or own land or a building in public ownership
- Looking to link TRP with other initiatives which might lead to area based participatory budgeting and agreement of local service delivery plans
- Continuing to develop our 'Estate Based Initiatives'
- Devolving budgets to support local TRP events and activities
- Creating a Local Information Board in each of the Area Offices

Objective 4 Using TRP as a means of addressing local issues

We see the future role of TRP in local areas as having two main functions:

- At a general level, we want locally based tenant and resident participation activities to act as the 'eyes and ears' of the local community in both identifying issues and problems but also in spotting opportunities for change and improvement
- More specifically, we want to develop a local 'mirroring' of the work done at the Perth-wide level by the SURE Team. This means that when the SURE Team has identified issues and made recommendations through its scrutiny reports, we will support tenants and residents at the local level to monitor the

implementation measures that have come from that scrutiny exercise to verify that these changes have indeed been delivered at the local level.

Objective 5 Developing the role of our Customer and Community

Engagement Team

The Sure Team Report told us that the principal way we have supported tenant and resident participation through the work of our Customer and Community Engagement Team, has been successful. However, they also pointed out the trap that social landlords have sometimes fallen into of believing that the responsibility within a housing service for achieving 'tenant participation' (or whatever term they use) is solely the responsibility of staff with 'tenant participation' (or similar) in their job title.

With this in mind, we will work to ensure that all our housing staff, and staff from other departments who deliver services to our tenants, understand that achieving effective tenant and resident participation is everyone's responsibility. Over the next three years the role of our Customer and Community Engagement Team will be to **facilitate** the development of TRP across Perth and Kinross, and not to be solely responsible for its delivery.

The future role of the Customer and Community Engagement Team, will be to:

- Support strategic TP initiatives around housing policy development and improvement of performance standards, quality and service delivery across the district:
- Pilot and evaluate new TRP initiatives
- Deliver TRP activities with agreed specific client groups e.g. the 'Homeless' or 'Us and the Housing' etc
- Provide tenant training and capacity building, delivered locally and jointly as staff/tenant training, and to pilot new training opportunities to build on successful initiatives such as the EBIs, Skills with Bills, and Digital Inclusion
- Develop and be responsible for monitoring TRP outcomes at both the strategic and area levels
- Support and up-skill area housing staff to carry out TRP activities in the four Locality teams, and
- Monitor and evaluate annual TRP performance, and review the overall progress in 2020 at the end of the next three year Tenant Participation Strategy.

Over the next three years we will ask our Customer and Community Engagement Team to build the skills, competences, and awareness of housing staff in the four Localities to help them take increasing responsibility for planning and delivering TRP at the local level.

Objective 6 Setting a minimum level for access to TRP in each local area

One of the tasks we will set for our Customer and Community Engagement Team is to work with staff in each of the four management areas to agree what we will designate as a minimum level of access to TRP at the local level.

In practice this will mean that staff in each Locality will agree with the Customer and Community Engagement Team an annual programme of local TRP activities to ensure that tenants and residents in each housing management area will be able to access, at least, an agreed number of activities drawn from our TRP menu. We will encourage our area teams to go beyond offering just the minimum level where possible. The objective will be to link up those TRP opportunities to the housing service locality plans.

Objective 7 Being clear what tenants can influence

We know that one of the reasons why some tenants do not take up participation opportunities is they believe their landlord will not act upon what tenants have said they want through previous participation activities. It can lead to complaints such as 'our landlord never listens to what tenants tell them' or 'they ask us for our views, but then do what they want'.

Our aim for the future is to be open and honest with our tenants about:

- What our tenants can influence
- How they can have that influence , and
- What decisions still have to be left to us as the landlord – and why.

As a rough 'rule of thumb' to guide our advice to tenants on what they can influence we will adopt the following principles:

- We will ask tenants who wish to have a say on housing matters that affect all Perth and Kinross Council tenants to be prepared to work collectively, and at the strategic level, to have that say. It will mean, for example, being prepared to work in formal structures with other tenants. These structures include such things as: the Tenant Participation Forum; the SURE Team; the Quality Panel; and so on. Each of these groups will have terms of reference which will set out clearly their objectives, scope, and powers.
- Where tenants simply want to express a view about their home, street, or local area, then we will offer them the opportunity to take advantage of those of our participation 'menu' items that are aimed at individual involvement or

involvement specifically at the local level (e.g. Estate Walkabouts, membership of RTOs, Estate Based Initiatives, etc).

We will work to ensure that tenants understand the difference between these two different participation 'routes' and what they offer to tenants in terms of the level and type of influence they can have.

Objective 8 Giving clear and timely feedback to tenants

We also know that tenants often say there is not enough or no feedback following their TRP involvement. The giving of clear and timely feedback to involved tenants is crucial to maintain their interest: they need to know what will happen next and when, or what can, or cannot be done, and why. The lack of TRP feedback may lead tenants to feel they have not been listened to, or that the agenda is one sided; that of the Housing Service and not one mutually agreed.

There are issues here around the timing of giving feedback; how it is given; whether or not the feedback contains messages that tenants might not want to hear, in which case it should be put in writing for clarity and the avoidance of doubt. To avoid confusion and disillusionment, we will build timely feedback into all aspects of our TRP processes, both strategic and local, as an essential step to achieve successful participation - with agreed procedures and timescales for 'feeding back' both to individuals and groups.

Objective 9 Focusing on outputs

Most social landlords worry about the number of tenants who are willing to get involved in their tenant and resident participation processes. Evidence both in Scotland and the UK generally tends to show that the absolute numbers of tenants willing to get involved in those processes is not only low, but probably declining. That evidence suggests that, in part, this is because traditional tenant and resident participation required people to join formal organisations, and that the propensity to do this has dropped. This is not just in housing-related activities but in society generally, as new lifestyles based on, for example, technologies of entertainment have become established.

Our aim is to get as many of our tenants involved as possible. We will judge the value for money of our TRP activities not simply in terms of its cost per number of people involved, but also by the quality of the outputs we get from it (even where the number of participants are relatively small). This means that we will deliver our TRP, and judge its success, by the extent to which it enables us to plan and deliver services efficiently and fairly, compared to what might have been the case without that interaction.

Objective 10 Making available appropriate budgets

As noted in Section 3, the SURE Team told us that they believed our annual TRP budget is set at about the right level to meet both current obligations and deliver the requirements set out in this strategy.

It is important, of course, that the TRP budget is well spent and that it delivers value for money. We have said in this document that we will be delivering more TRP work at the local level, and this will be reflected in how the budget is spent each year. Many demands will still be the same: publicity; information; venue hire, reimbursement of tenant expenses, training etc., but we know that new ones will arise.

Where new local TRP initiatives are piloted then specific budget provision will be required. The Locality teams will be given a budget, from the overall TRP budget, to kick start and to promote local TRP activities in agreement with the Customer and Community Engagement Team.

During the lifetime of the last TP strategy, we used part of the TP budget to provide external consultancy support to specific tenant-led bodies i.e.: the SURE Team; the Rent-Restructuring Group; and the Mystery Shoppers. We will keep the need for further such support under review, but we have already taken steps to extend consultancy support for the SURE Team up until at least 2021.

We will look to involve tenants directly in prioritising future demands on these budgets over the next three years using criteria which anticipate the potential TP outputs and value to the Housing Service, and not just simply the initial costs.

Objective 11 Planning and publicising our TRP work in advance

We want also to present a clear annual overview to tenants about what they can expect from our TRP programme in the coming year. In this respect we will:

- Publish an annual Tenant and Resident Participation Calendar containing all key dates both for strategic activities and local area work/events
- Hold both centrally located events (e.g. the Tenant Conference) and at least one main event per year in each of the local areas which are accessible by public transport. In consultation with tenants, we will link into and build upon existing community fun day events. Over time in our more rural areas, we will try to rotate the location of these types of 'social, interactive events'.

Objective 12 Monitoring and Evaluation of TRP

We have always worked with our tenants to monitor and evaluate our participation activities. In the next three years we will work to further develop how we do these activities.

There are three principal new developments that we will look to implement:

- The Tenant Participation Monitoring Group that formerly worked with us to monitor the operation of the previous Tenant Participation Strategy folded due to lack of interest. We will revive this function by further developing the scope of the SURE Team to include a TRP monitoring function. We will recruit and train new tenants to join the SURE Team to carry out the monitoring role. Those recruits will become SURE Team members for the duration of a six-monthly TRP monitoring exercise.
- We will further develop links and accountability / reporting back between the SURE Team, both in its scrutiny and monitoring role, and the Tenant Participation Forum. We piloted this successfully whilst the SURE Team was carrying out its scrutiny review of TRP, and in its production of the initial draft of this strategy.
- We will use a formal evaluation framework (LEAP) as our main TRP monitoring and evaluation instrument. This means that we will monitor and evaluate using a 5 step process i.e.
 - **Step 1** **What now needs to change?**
 - **Step 2** **How will we know? (Agreeing outcome indicators)**
 - **Step 3** **How will we do it? (What resources will we use? what methods will we use? what will we do?)**
 - **Step 4** **Are we doing it?**
 - **Step 5** **How useful was it and what did we learn?**

Objective 13 Using our interested persons list

We currently have a list of 700 'interested persons' i.e. tenants who told us through our last tenant satisfaction survey that they were interested in being kept informed about developments in council housing in the Perth and Kinross council area, and who might want to receive more information about the work of the Housing Service (including TRP activities).

We will use that group as a 'sounding board' to try out new ideas on service delivery and tenant and resident participation, using internet-based and other digital media. The responses we get here will, alongside the work done by our formal structure at the strategic level, and what is emerging from local level TRP, give us a much more comprehensive picture of what our tenants want from their landlord, and how well we are delivering it.

Objective 14 Using new technology

Perth and Kinross Council currently uses a wide range of internet-based and digital media techniques to talk to its service users and to offer the opportunity to give the Council their views.

We know that the traditional means of communicating with tenants (e.g. newsletters, telephone, meetings, formal 'participation' groups, etc.) have for some time had a diminishing effect. So in line with what the council is looking to do across all its services, we will complement those traditional communication techniques with the use of the new technologies. Specifically, we will:

- Continue to develop our social media channels to increase the flow of information to our tenants
- Test new ways of creating and sharing helpful information to tenants through the use of films and animation rather than leaflets and handouts
- Test new ways of bringing people together in 'virtual meetings' using tools like Skype and FaceBook Question Time
- Encourage our tenants to use email to access newsletters to reduce paper publications , saving money and being greener
- Develop a Tenant E-Panel to enable people to take part and comment on a range of issues
- Support our tenants to embrace technology to participate

Conclusions

We believe this Strategy will enable us to build on our existing strengths in planning and delivering TRP for all our tenants. It will also allow us to develop new strengths and new-successes over the next three years, and beyond.

This is not the first strategy that has been produced following an external review of our TRP activities. It is the first time we have asked a tenant-led group to scrutinise those activities and to develop for us a draft TRP strategy based on the evidence and recommendations of that review. So we believe that this strategy has been tenant-driven and tenant-led. This is the principle that we want to guide all our TRP work over the next three years.

Appendix 1 How well do we do 'tenant and resident participation' at the moment?

Introduction

The 2014-17 TP Strategy recognised that TP is a continually evolving process which has to adapt to changes in demand, service delivery priorities, working practices, interests and perceptions. In its review of our TP work, and the operation of the previous strategy, the SURE Team said that “**it is clear that considerable progress and significant achievements have been made over the last three years.**”

1.1 Changes and Development since 2014

Like many social landlords we have seen a decline in interest from tenants wanting to be part of traditional tenant group structures (such as a Tenant and Resident Federation and RTOs) not just over the lifetime of the previous TP strategy, but for a number of years prior to that. We will, of course, continue our partnership working with individual RTOs and local tenant and resident groups to achieve local initiatives / improvements. We will also continue to encourage tenants to form RTOs where this is their preferred form of engagement with us.

During the last three years, however, other developments using less formal types of participation have happened, notably:

- Effective working relationships have been established with the Gypsy community living on the Council's static site
- Thematic forums have been used to develop new strategic working relationships e.g. with the 'Homeless Voice', 'Us and the Housing' (to engage with disabled people) and the Older Persons' Forum, and
- The TP Forum has successfully been used to initiate discussion and obtain feedback on aspects of housing service delivery.

New ground has been broken through the pioneering type of initiatives that have been introduced, sometimes as a direct outcome of tenant learning and personal development, particularly at the strategic level. These include new opportunities for tenants to shape and influence service delivery from:

- The setting up of the **Residents'** Academy
- The development and operation of our award-winning SURE Team
- Mystery Shopping

- The Quality Panel
- Piloting new ways of communicating with tenants, following digital inclusion skills training and development, and
- Supporting the involvement of people following on from their learning and up-skilling both in district-wide strategic TP and to use these skills to improve local neighbourhoods and communities through the Estate Based Initiatives (EBIs).

1.2 Who participates with us?

The SURE Team's analysis of our recent tenant participation activities over the period of April 1st 2015 until September 30th 2016 told us about the scope and take-up of tenant participation activities. Their principal findings were that over that period:

- There were 1,199 contact hours with the Housing Service
- Delivered in 530 meetings
- Held in 45 venues across the district
- Involving a total of 4,062 attendances and
- Generating a total of 8,970 contact hours by participants in taking part.

Assuming an 8 hour day 8,970 contact hours equate to 1,121 days (or the equivalent of just over three years). If this time is equated to full time council employees, assuming 38 hours per week over 46 working weeks to deduct an average of 6 weeks holiday (1,748 hours per year) this would equate to just over the equivalent of 5 additional full time employees.

What it also showed us was that our tenant participation activities in 2014-2017 fell broadly into 8 categories (with approximate percentages of contact hours compared with total contact hours).

1. Work with the Homeless
38%
2. Local Initiatives (e.g. RTOs, estate walkabouts, Estate Based Initiatives)
23%
3. Strategic (e.g. Quality Panel), SURE Team, Rent Restructuring Group
22%
4. Training
10%
5. People with disabilities
5%
6. Social Networking
2%

Although the number of tenant participation contact hours with homeless people seems to be a high, there are two reasons why we think we need to keep these types of activities as part of our future tenant and resident participation 'menu'. First, many homeless people go on to become our tenants and this support helps them not only to get a tenancy but means they are more likely to sustain it. Second, the Scottish Housing Regulator requires us to show that we engage not only with existing tenants, but also with prospective tenants (many of whom may well have been homeless before getting a tenancy from the Council).

1.3 What do we do well (and less well)?

The Sure Team's evaluation included an assessment of our strengths and weaknesses in relation to how we deliver tenant participation, and also in respect of the future opportunities and threats. Their main conclusions were:

Our Strengths

- The experience and commitment of the Customer and Community Engagement Team has been **effective in identifying and piloting new TP initiatives**
- This centrally based staff team has the **necessary range of skills**, knowledge and most importantly, good communication skills to build relationships with people
- **The positive backing of the Senior Housing Management Team** for the Customer and Community Engagement Team to try out and to respond to new initiatives
- **Using a sequenced approach to develop TP activities:** to train and support tenants to become active; to provide stepping stones from training to becoming 'involved' tenants at district-wide or local level through community initiatives designed to improve council housing neighbourhoods, and joint staff and tenant training to develop shared understanding and working relationships
- **Short-life Working Groups** have been successful in engaging with tenants and service users on specific topics eg Rent Restructure Review, the review of Sheltered Housing, Policy Reviews and Housing Repairs
- **Some RTOs have been more outward** looking than others in taking an interest in issues beyond housing. This has added to their success, their local impact and contribution and to their longer term relevance and survival e.g. in Letham and Tulloch and finally,

- The **setting up, training and independently supporting** the SURE Team to pilot and develop tenant-led scrutiny of aspects of housing service delivery and appraisal of annual housing service performance. The SURE Team has received both national and local recognition

Our Weaknesses

- The Customer and Community Engagement Team has been **less successful in monitoring and evaluating the TP activities** than in initiating them, particularly those delivered by the Locality Teams
- The inability to overcome the feeling from many tenants **that staff don't listen** and that the Housing Service is pushing its own Agenda without first finding out what tenants and the local community think is required
- **Delay and lack of clarity in feeding back to tenants** after their involvement. This leaves tenants feeling their input is not valued, or at a loss to know what is agreed, what is to happen next and by when
- **Locality teams have less TP experience**; have limited capacity to respond to tenant-led initiatives due to the demands of the Housing Management service delivery; and some are not clear about how to respond to ideas from tenants, so seem to be discouraging
- **Some Locality staff are less willing to work with individual tenants** and/or local community groups who want to raise concerns or introduce change for the better into their neighbourhood. We recommend that the Housing Service should work **with** not against tenants providing that this is approached in an open, inclusive and transparent manner
- **Reduced contact between tenants** because of lack of interest in meeting collectively with other tenants to talk about issues of local concern and the successful use of social media and texting which fills the communication gap etc.
- Some RTOs /groups are **over- dependent on key individuals**. When the drive or energy from the 'willing' person is no longer there to rely on, some RTOs/groups fold. Many tenants do not want to take on the administrative bureaucracy that comes with setting up these types of formal TP structures. Other council landlords have experienced a similar impact from the change in society's attitudes towards voluntary and community activity, especially from new tenants. Others look to local participation activities to overcome isolation and loneliness, so have a focus as 'Friendship Groups' in some areas

- **There is no local promotion of TP** through the Locality Teams to explain the existing TP structures, how tenants can get involved or what this type of involvement might achieve. We know that TP activities in council housing areas can be more visible and high profile with staff, tenants and Councillors all being involved. The Housing Service needs to review and update its information and leaflets to explain what the next TRP Strategy will offer tenants.

Future Opportunities

- **Digital inclusion** is an exciting opportunity with potential – it enhances individual skills and may lead to more tenants wanting to continue their involvement in the TP programme as well as helping them to cope in an increasingly digital age
- **Community Planning** on estates (as a consequence of the provisions of the Community Empowerment Act) potentially offers a new opportunity for partnership working and engagement at the neighbourhood level. The Housing Service needs to consider: how to take this forward; how to get tenants and local communities in areas of council housing informed, involved, and be practically supported. Could other Council departments help? Could this type of initiative be a focus for joint training and be the stimulus for tenants to become involved in the next generation of EBIs?
- **Investment in learning** is a key strength for tenants. Joint learning opportunities for ‘tenants and staff’ together are very valuable. In future training should be **delivered more in the Localities** to try to draw in more people, to foster positive local working relationships, to help tenants to understand what TP can offer, and to support the upskilling of tenants to be able to work with Area Housing staff and external agencies
- The Locality model is about putting tenants at the ‘heart’. Local teams will need support and resources to achieve this. **There is real scope to engage tenants in work in the Localities.** This will need a cultural change to create a positive ‘says YES’ attitude; time to be developed; and eventually to be embedded. This could include Community Planning in some areas; the Council has to have Local Outcome Improvement Plans to address inequalities and focus on local priorities. There could be opportunities in each locality arising out of ‘area plans’ that tenants and residents are engaged in producing. We understand that work in Letham for example is helping to pioneer this type of approach.

- Ensure **follow-on support, resources and trained staff** to continue to build and use the new skills learnt by tenants and staff. The Customer and Community Engagement Team provide much of this support now through the Estate Based Initiatives. Could specific joint working and learning initiatives in the Locality teams help to nurture this approach if introduced on a gradual basis over the next three year TRP Strategy and with the support of staff in the central TP team?
- Some recent TP initiatives have simply been about bringing tenants together to overcome isolation and loneliness eg the centrally based Tenant and Community Engagement Worker has successfully arranged Tea dances. Some Friendship Groups meet locally. Whilst largely social in nature, these types of activities could still create opportunities to engage with tenants on local issues affecting the Housing Service or the neighbourhood
- **Follow-up on the 700 Interested Person's list** to try to actively engage more tenants in the Council's TP activities The extensive centrally held database of all tenants who have expressed interest in being an involved tenant and those who are already engaged in some way within the Council's Tenant Participation activities is an asset. This could be a specific task to pilot how effective new and updated TP information is in getting a positive interest and to monitor how much active involvement can be generated and sustained
- Tenant involvement in **monitoring and evaluating expenditure under the Housing Revenue Account (HRA) is a key strategic opportunity** that tenants need to be involved in – possibly using the TP budget as a pilot training exercise to develop a template for how to do it. This should be a priority for the Council's next three year TP Strategy as a logical extension of tenant-led scrutiny
- **Restart the TP Monitoring and Evaluation Group** – the SURE Team assisted by other interested tenants will take on this detailed monitoring and evaluation role on a twice a year basis with feedback being presented by these tenants to the TP Forum to give more openness, transparency and wider opportunities for tenants to have their say and/or become aware of the range of TP opportunities that are available to council tenants
- Continue to **support and strengthen individual Tenant Organisations or RTOs** as speaking up for specific sections or groups of tenants and housing service users or representing the interests of specific local neighbourhoods

Future Threats

- **Budget restrictions / constraints** on the Customer and Community Engagement team staff and non-staff cost budgets, and to the four Locality Teams – the loss of key personnel from the Customer and Community Engagement Team and/or the Locality teams would be very damaging of attempts to expand on the progress made in TP over the next three year TRP Strategy
- **Lack of interest, ability or capacity of Locality Teams to respond** to local tenants who are interested in TP and who do want to initiate change for the better in their area through an open, proper and inclusive process of engagement
- **Lack of interest from tenants and residents** to attend and take part in the TP initiatives on offer
- The shaping of local agendas by **external forces** and not by tenants
- **The integrity of the Council's Customer and Community Engagement staff team needs to be protected.** It will be required to offer some practical advice and support to the four Locality Teams. This can only be on a part-time, short term or a project specific basis to develop the capacity and skills of the area based staff. This specialist team has to retain its ability to initiate and support TRP district-wide, to take an overview, and to carry out a TRP performance monitoring and evaluation role.

Resources

The Council has made an annual staff and non-staff cost budget available to manage, develop and deliver TP activities and to service the various TP structures. The budget for 2017/18 and 2018/19 is £101,000, which equates to around £13.54 per tenant household. The budget will be reviewed on annual basis and approved by Housing and Communities Committee as part of the Housing Revenue Account business planning process for Housing Services.

This non-staff budget is supplemented by support from the Customer and Community Engagement staff team based around 6 specialist post-holders (providing the equivalent of approximately 4 full time posts), service specific advice from other Senior Managers to facilitate participation initiatives eg The Rent Restructure Review, and from housing staff in the four Housing Management Area Teams and, as required, other council staff teams eg the Safer Communities Team support some community based initiatives, or staff from external agencies may be involved.

The TP budget has also paid for external consultancy advice and support to enable specific TP initiatives to be delivered: The IA support for each of the SURE Team, the Rent- Restructure Project, and the Mystery Shopping. The TP Budget has been used successfully to initiate new TP activities. These in turn have impacted positively on housing service improvement. The Sure Team told us that they thought the current budget level was about right to enable the delivery of this new strategy.

Appendix 2 – the SURE Team’s TP Scrutiny Recommendations

Recommendation 1

The term ‘Tenant Participation’ should continue to be used as the best term to describe the activities that PKC’s Housing Service engages in with tenants, housing service users and the wider community as these are predominantly funded by the Housing Revenue Account and rents paid by council tenants

Recommendation 2

The Council’s current TP strategy sets out a vision and aims, which we agree, but it does not contain a definition of TP. Our definition, for inclusion in the next TP Strategy is that:

‘Tenant Participation properly refers to the processes and structures by means of which all PKC tenants and service users have the opportunity to influence both the setting of policies for council housing services and the nature of service delivery for council housing, and, with other residents, be involved in estate, neighbourhood and community issues.’

Recommendation 3

The next TP Strategy will need to continue to offer a ‘**menu**’ approach to tenant participation: by complying with the provisions in the 2001 Act to fund and support formal, collective TP systems and structures, including RTOs, where tenants come together to engage in TP activities, and, more modern opportunities with emphasis on flexible, less formal methods of participation, engaging with tenants individually, and using social media, mobile phones and new technology as additional opportunities to talk to tenants

Recommendation 4

The most recent relevant legislation affecting tenant participation is the Community Empowerment (Scotland) Act 2015 which ‘**sets out a plan for empowering the people of Scotland**’. We think this has the potential to be the most radical legislative framework that will intersect with tenant participation systems and structures based around four sections that are relevant to tenants (working collectively) in their local communities. These are:

Part 2 Community Planning

Part 3 Participation Requests

Part 3 Community Rights to Land

Part 4 Asset Transfer Requests

Each sets out rights (not just requests) for individuals and groups working in their communities to influence decisions in respect of land, buildings and policies that shape their

neighbourhoods. These potentially fit well if the Council accepts our Recommendation 8 to place a much greater emphasis on delivering tenant participation in local communities and by local housing teams

Recommendation 5

We think that the Housing Service in assessing the impact of TP should place an equal emphasis on what it achieves or the **outcomes** of participation irrespective of the actual numbers of tenants involved in each specific TP activity. The Service should ask whether and how it has demonstrably helped improve policy development, service delivery and / or the neighbourhood.

Recommendation 6

From national research in Scotland and the UK, evidence shows that **at most only 40% of tenants** will be interested in being involved tenants to have their say or to help the landlord to improve housing services. In setting targets for involvement, the Housing Service has to be realistic. Any strategies for 'combatting apathy' have to recognise that non-engagement may be a perfectly logical response for the majority of tenants who do not have the time, interest, or who believe that it will not make any difference because the Service will not listen.

Recommendation 7

The value of tenant participation, both for the landlord and all tenants, is the extent to which it gives a landlord **a tenant perspective on its work** that it would not otherwise have, and that this 'insight' is used to make the service better than it would have been without that tenant input. It enables a social landlord to fulfil its obligations to all of its tenants by seeking to understand their needs and the wider customer base as service users. This is summarised by the 'You said.. We did' type approach to highlight service improvements

Recommendation 8

Given the recent re-structuring of the Housing Management Service into four Area or Locality Teams, the next TP Strategy will need to **strike the right balance** between district-wide (centrally delivered) and local collective opportunities for Tenant Participation and resolve how the staff and non-staff TP budget can be used to achieve this.

The work at the area level TP should take two forms:

Recommendation 8a

Tenant Participation at the local level should **respond to local concerns and issues**. That is: a prime focus should be on responding to locally identified issues and opportunities.

Recommendation 8b

There should be a **local ‘mirroring’ of TP work done at the strategic level**. In the case of the SURE Team, for example, area-based TP should also be focused on monitoring how the SURE Team’s recommendations on any individual scrutiny topic , that have been accepted by HMT, are then subsequently delivered at the area level.

In respect of both of these work strands the targets and outcomes for them should be set and monitored by the Customer and Community Engagement Team.

Recommendation 9

We think that the TP non-staff cost budget has been used to good effect over the last three years to initiate and try out new TP activities eg Mystery Shopping, tenant-led scrutiny, new types of training opportunities, and steps to encourage tenants to contribute their learning through involvement in other TP activities, both district-wide and locally eg the Estate Based Initiatives. TP should not only be seen as a ‘cost’ to the landlord to deliver. It should be seen as involving both **inputs** (i.e. the money spent by the landlord) and **outputs** (the value created by tenant participants).

Recommendation 10

TPAS recognised in its Report of 9 December 2013 *‘it might still not be clear to tenants how all the various TP structures and activities fit together to make up the Council’s TP Strategy’*.

We think this is still the case despite the many and varied efforts that the Housing Service has made to inform, engage with and invite tenants to become involved. The right balance has to be found in the next 3 year TP strategy between activities delivered PKC wide from the centre and the encouragement of more TP within each of the four Locality teams. Both tenants and staff need to work together to jointly prepare appropriate TP information. This should explain the TP opportunities that are available, how the menu fits together, what each activity aims to do and its limits, how decisions will be made and shared, the need for staff to provide clear, timely and appropriate feedback to those involved, and to keep those tenants who aren’t involved aware of what is being considered

Recommendation 11

The drive, commitment, enthusiasm and skill mix of the staff in the Customer and Community Engagement Team needs to be protected and used appropriately to support

the delivery of the next 3 year TP Strategy. The role for the staff in the central specialist TP staff team needs to be defined to:

- **Support strategic initiatives** around housing policy development, improvement of performance standards, quality and service delivery across the PKC district
- **Pilot and evaluate** new Tenant Participation initiatives
- **Deliver TP activities with agreed specific client groups** eg the 'homeless' or 'Us and the Housing'
- **Provide tenant training and capacity building**, delivered jointly as staff/tenant training in each Locality, and the piloting of new training opportunities to build on successful initiatives eg Digital Inclusion for example
- **Develop and be responsible for monitoring TP outcomes at both the district-wide and area level**
- **Support and up-skill area housing staff** to carry out Tenant Participation activities in the four Locality teams, and
- **Monitor and evaluate** annual TP performance and the overall three year Tenant Participation programme in 2020.

Recommendation 12

The network of contacts of the Customer and Community Engagement Team Leader, whose post involves delivery of a wider community engagement remit for the Council could be used **to develop effective working relationships** with the Council's Planning and Neighbourhood Services teams to inform and to help drive the TP Localities Agenda forward

Recommendation 13

The Customer and Community Engagement Team should set out what the '**minimum level of access**' to TP would be and how TP would be developed and supported in each Locality team during the next three year TP Strategy

Recommendation 14

We think the Council needs to be clear why it accounts for engagement with homeless people in the TP strategy rather than within the Homeless Support Service

Recommendation 15

To avoid confusion and disillusionment, we recommend that **proper feedback** should be built into the TP process as an essential step to achieve successful tenant

participation with agreed procedures and timescales for staff to 'feed-back', if possible, without it becoming too rigid and routine.

Recommendation 16

Given the expected pressure on budgets and resources, a way of involving tenants to consider and to **prioritise future demands on the TP budget** over the next 3 years has to be developed using criteria to help them to understand the potential outputs and value to both tenants and the Housing Service and not simply to look at the initial costs.

Recommendation 17

Once tenants have evaluated the TP budget, this approach should be '**scaled up**' to train and support tenants to comment on and to prioritise spending in the Housing Revenue Account. Tenants would need to understand the issues and be able to express their views on the challenges facing the Housing Service

Recommendation 18

When the Housing Service reviews annual performance and agrees its Action Plan for the next 12 months, it should agree **dates for key TP opportunities** both centrally and in each of the four Housing Management areas. In each Housing Management Team the aim of a 'Locality Event' should be to combine an open TP and information opportunity with other local social activities or community fun days. This would have a bigger impact locally; should be more engaging; and be of interest to both tenants and other residents. A longer lead-in time should be allowed for tenants and staff to jointly prepare for these key participation activities at both the central and local level.

Recommendation 19

The Tenant Participation Monitoring Group has folded. There is insufficient monitoring and evaluation of the TP programme by tenants. **The TP monitoring function should be re-established** as part of the on-going development of the SURE Team in leading on tenant-led scrutiny. The TP monitoring function should involve other tenants and service users and be carried out twice a year, based on a series of assessment criteria that are agreed and reviewed annually. There should be a full report back for discussion at the TP Forum. This will give more openness and transparency. It might well create a stepping stone to invite interest in the housing service scrutiny role of the SURE Team. Also all four Locality teams should have a local TP monitoring and evaluation function and a mechanism to feedback to the SURE Team, possibly by a tenant from each Locality Team attending the TP monitoring meetings of the SURE Team

Recommendation 20

We recommend that **Mystery Shopping be repeated** and given a budget for an Independent Adviser with a second exercise being used to either provide evidence for a future tenant-led scrutiny or to assess how and with what impact agreed recommendations from previous scrutiny exercises are being implemented by each of the four Housing Management teams

Recommendation 21

A pilot exercise to actively **engage tenants on the list of 700 interested persons** in future TP activities would be very informative. This list was obtained from the last Tenant Satisfaction Survey. It could assess how effective any new and updated TP information is in getting a positive response from previously un-involved tenants and then to monitor how long their active involvement continues after the follow-up contact is made

Recommendation 22

During the next 3 year TP Strategy we think there needs to be a gradual and supported hand-over coupled with training for the housing staff in the **Locality teams to begin to lead local Tenant Participation initiatives in their area**, possibly underpinned initially by short term, project specific advice and support from the specialist staff in the Customer and Community Engagement Team

Recommendation 23

TP training for Housing Officers, and joint staff and tenant training should be arranged by the Customer and Community Engagement Team possibly as part of the proposals for the CIH accredited Training Academy, with some of this training aimed to build skills and working relationships between staff and tenants and to be delivered in each of Locality during the next 3 years

Recommendation 24

The SURE Team will make **a first draft of the next 3 year TP Strategy**, based on the initial feedback from the HMT, the Customer and Community Engagement Team Leader and discussion with the TP Forum for full discussion, consultation and agreement.

Appendix 3 - Draft Guidelines for all tenants, housing service users and residents involved in meeting with others as a group as part of the Council's TRP Strategy 2017-2020

The purpose of the Tenant and Resident Participation Strategy is to encourage and support Council tenants, housing service users and residents living within the communities managed by the four Locality teams to:

- Represent the interest of all tenants in discussion about the delivery of the Council's Housing Service at district-wide or Locality level
- Represent the interest of all tenants and residents within their estate, neighbourhood or community in matters which affect or impact on all local residents
- Build bridges and good working relationships between tenants, housing service users, residents housing officers, advisers and other partners or external organisations, and to
- Ensure that all TRP meetings are planned, well-run, are productive and lead to positive outcomes.

All tenants, housing service users and residents, who want to work together in the Council's Tenant and Resident Participation structures will be invited to discuss and agree appropriate guidelines, Terms of Reference and/or a Code of Conduct to help their meetings work well and to achieve the outcomes participants want to make happen. The Council will provide appropriate training and support for housing officers, tenants, housing service users and residents as required.

As a guide all tenants, housing service users and residents who are involved in the Council's TRP 2017-2020 will be expected to:

- Be aware of and to promote equal opportunities, to oppose discrimination and will be invited to take part in Equalities and Diversity Training, and any other relevant training that the Council provides
- Turn off all mobile devices or put them on silent mode during meetings
- Give an apology in advance when regular membership of a group is expected if unable to attend
- Respect the Chair of the meeting and the right of individual members, officers, external advisers or invited speakers to speak at the meeting
- Follow the meeting agenda. Any change to the order of discussion or content shall be as agreed by the Chair
- Listen and contribute during the course of the meeting to give everyone a chance to speak
- Raise their hand to be invited to speak so everyone can hear what is being said
- Consider, discuss, and respect different views to reach a consensus of opinion where possible
- Be punctual. Show common courtesy and do not behave aggressively towards staff or participants

- Not to use Group meetings to raise issues which relate to their own personal circumstances: instead issues raised must be relevant to the work of the Group and have some general applicability
- Abide by confidentiality when it is agreed by the Group to keep any commercially sensitive or personal information that has been discussed during the meeting confidential within the Group
- Record attendance, apologies and actions agreed and for progress made to be reported to the next meeting
- Attend regularly where membership is required. If a member of any member fails to attend **three** consecutive meetings of a group, without a reason which is acceptable to the Chair, they will be asked to explain their absence and could be excluded from that Group
- Respect the Group's Terms of Reference or any agreed Code of Conduct. The Chair has the authority to ask a tenant, housing service user or resident to leave the meeting, or in the case of repeated breaches, the Group, and
- Finally the Group could decide to exclude a person(s) where it believes their continued membership could bring the Group into disrepute or could harm its reputation

Agreement to Accept the Council's TRP Making Meetings Work Well Guidelines

I acknowledge the need for Group meetings and all TRP activities where staff, tenants, housing service users and residents work together to be welcoming and productive. I will abide by the above Guidelines when attending any Group meetings and related TRP activities, and will take part in any relevant training when offered by the Council.

I **(Print Name)**

Of **(Address)**

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Signed:
.....

Dated:
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