

Client Engagement Strategy: 2024- 2027

August 2024



Introduction: our values and purpose

Our strategy needs to support our purpose to enable people to live independent and fulfilling lives. Fundamental to the development of this strategy is that it has been co-produced with those at the heart of service delivery – Transform clients.

The Strategy has been developed in line with our Values below:

- **Responsibility** – enabling clients to have a lead role and take responsibility for ensuring we deliver a solid and meaningful strategy.
- **Excellence** – ensuring we ask for input from others to deliver an excellent strategy.
- **Empowerment** – ensure clients voices influence the strategy.
- **Respect** – recognise that clients have choice and control over how they engage with us and that our strategy reflects their priorities and expertise.

Equality, Diversity, and Inclusion (EDI) are core to our purpose and values making them fundamental to the way we work and underpins our approach to client engagement.

We are committed to ensuring that all documentation we produce is in line with Plain English standards. We will ensure that all client facing information has been approved by the Client Forum. The new Client Forum group logo will be used to confirm this.

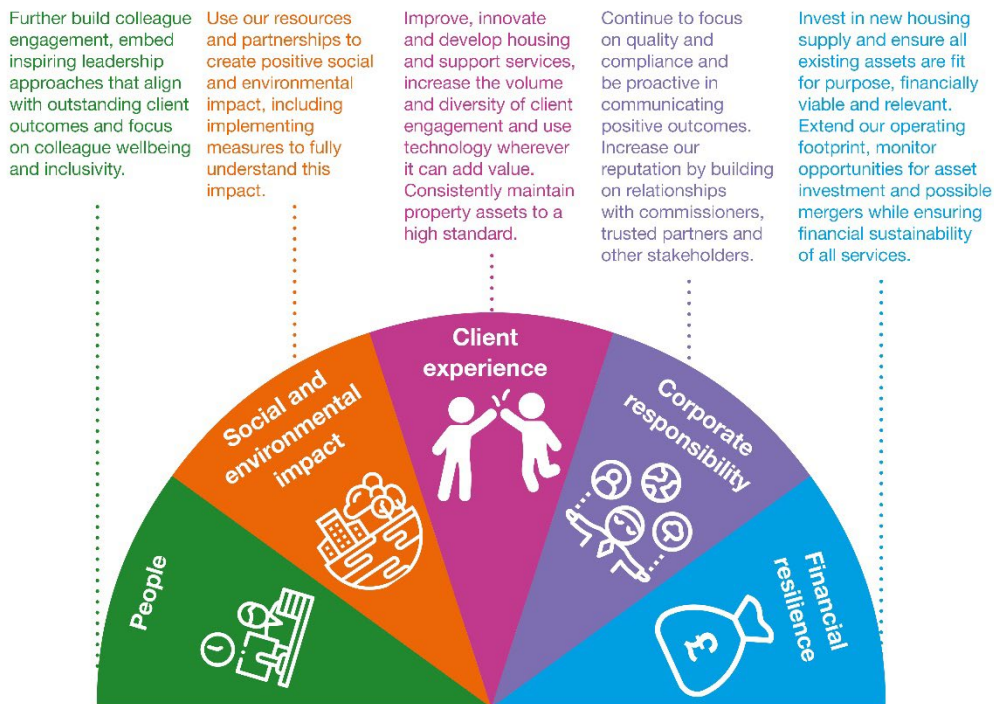
The purpose of the 2024 to 2027 Client Engagement Strategy is to:

- Positively and effectively engage with clients so that their voices influence our decision making.
- Enable us to enhance and continually improve our services to make us better and more effective in what we deliver to meet client needs and aspirations.
- Satisfy regulators and commissioners that we are delivering best practice in client engagement.

1. Context

1.1. Corporate Strategic priorities

Below are the 5 key corporate strategic priorities that we have in place.



1.2. Current operating environment

We are operating in a challenging time with a cost-of-living crisis and stretched public services. Local authorities (the county council and district and boroughs) have greater demands for services but often say they do not have enough funding from central government. This can impact on the funding we receive from councils to provide our services and makes it harder to recruit and retain staff because Surrey is an expensive area to live in, with little public transport.

This makes it ever more important that clients can engage with us and tell us what most matters to them. We will work together to help ensure funders and commissioners hear our clients' views.

1.3. Best practice and regulation

This strategy is being developed in a period of increased consumer regulation. This has been influenced by tragic events, including Grenfell and the sad death of Awaab Ishak who died aged just two years old, after living in housing with damp and mould which contributed to his health condition.

This new regulation includes:

- **Housing Ombudsman Service Complaint Handling Code 2024** – which sets the way complaints and service requests are defined, processed, reported and monitored.
- **The Regulation of Social Housing Act (2023)** which introduced:
 - powers to set strict time limits for social landlords to address hazards such as damp and mould

- new qualification requirements for social housing managers
- **Tenant Satisfaction Measures** – introduced in 2023, which we report on through Client surveys and other measures
- **Regulator of Social Housing Consumer Standards** which have been updated. These include requirements for us to publish and provide Access to Information about our performance and how we operate so clients can hold us to account.

Our strategy reflects the new regulation and we are confident that it will help us improve our accountability and continue to improve our services.

1.4. What Transform clients have said is important to them

Transform's Client Surveys over recent years have helped us understand the things that are important to clients. The key messages from Transform clients include:

- Communication is key so people feel heard, respected and to be empowered.
- Complaints handling needs to help Transform understand underlying issues that create dissatisfaction and try to address these.
- Repairs handling and maintenance are essential so we provide quality homes for our clients.
- Resources can be stretched and impact on services. We need to work with clients (and other partners) to co-produce and develop new ways of working that make the best use of the resources we have and improve recruitment and retention of staff.
- Doing what we say we will is important for our clients as it builds trust.

1.5. Developing our Business Plans

Our business plans are informed by the feedback from Transform clients, the importance of their voices being heard and the regulation we need to comply with.

The Business Plan was discussed with the Client Forum in April 2024 and they approved the contents, including our commitment to:

- Implement and promote our new complaints policies. These were approved by the Client Forum in February 2023 and clients' voices were central to the training we developed for all staff.
- Undertake annual client satisfaction surveys and develop swifter ways of responding to issues identified through responses.
- Embed our new approach to repairs reporting and act upon the feedback we get from clients about the repairs service.
- Develop our next Client Engagement Strategy to reflect clients' priorities and improve services.

We have also reviewed terms and conditions for staff to help us recruit and keep people with the skills and values needed to provide good services for clients.

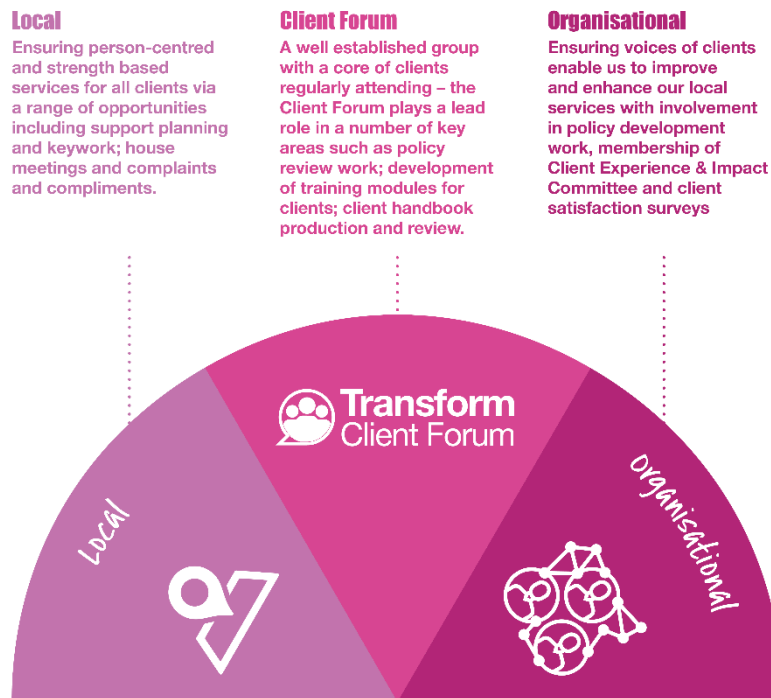
2. Developing our strategy: 2024-27

Our starting point for our new strategy has been to look at our progress against the actions identified for the strategy in 2022 to 2024.

- Some things have been achieved and will continue as “Business As Usual” (e.g. Client Forum representatives are members of the Board’s Client Experience and Impact Committee).
- Some things have been achieved (e.g. the Client Forum logo was agreed).
- Some things may not have been achieved and we have considered:
 - why this is the case,
 - whether they are still things we want to do, or
 - if we need to do things differently to achieve the objective.

We recognise three different levels or areas for engagement:

- Local (including influencing and directing an individual’s support and influencing local schemes, for example through shared house meetings)
- Client Forum
- Organisation (including a role in how Transform is governed).



3. Measuring the impact of our strategy

We have agreed on how we will report on the delivery and impact of the strategy.

- **Key Performance Indicators** have been agreed:
 - To increase the number of people attending the Client Forum and have at least five clients attending each meeting
 - To have 100% of the services represented by clients and staff (“services” are usually defined by area and headed by a Service Manager or Housing & Support Manager)
 - To increase the number (and percentage) of clients responding to the annual Client Survey year-on-year

- To increase client satisfaction with Transform keeping them informed about things that matter to them and listening and acting on their views
- **Discussions at Client Forum meetings** will review the delivery of agreed actions. These are set out in the action plan at the end of this strategy.
- **Reports on progress against our action plan** will be included in our Client Newsletters and posted on our website.

4. Strategy Review

The Strategy will be reviewed annually so it can be improved and adapted to reflect changing priorities and opportunities. It will be formally reviewed after a period of 3 year

Appendix 1 – Action Plan for delivery of the strategy 2024-27

Key area	Led by	By when	KPI/ Measure of Success	What's involved (why things may not have been achieved, what we might do differently)
Client Forum Activity				
<p>Client Forum development</p> <ul style="list-style-type: none"> Share and promote the benefits for those in the Client Forum with other clients to encourage increased involvement by: The Director of Client Services and Client Forum members will agree a program of visits and meet clients at services. Information about the Client Forum in in the handbook and on the website. Examples of what the Client Forum has achieved are promoted via the Client Newsletter and on Transform's website. Existing Client Forum members promote and encourage other clients to attend. Managers and keyworkers encourage and support clients to attend. 	<p>Director of Client Services</p> <p>Marketing & Comms</p> <p>All</p>	<p>2025 onwards</p> <p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Number of clients on involved on the Client Forum during the year.</p> <p>Number of Transform Services with staff and client representatives at the Client Forum.</p> <p>Should we also have an indicator which measures clients satisfaction with the work of the forum?</p> <p>And one about being able to evidence impact</p>	<p>We have recruited a Client Services Team Administrator to help arrange visits and to support the organisation of the Client Forum.</p>

Key area	Led by	By when	KPI/ Measure of Success	What's involved (why things may not have been achieved, what we might do differently)
<p>Policy development Agree with the Client Forum which policies need to be reviewed and agreed by them.</p> <p>Client Forum endorsed policies available on website</p>	Director of Client Services	October 2024 and ongoing	<p>Policy schedule agreed.</p> <p>Agreed policies are reviewed and approved with the Client Forum logo</p>	<p>The Client Forum endorsement of policies is important. In June 2024 members have said they want to focus on reviewing policies which:</p> <ul style="list-style-type: none"> ▪ Apply to all or most clients ▪ Set out how Transform delivers and meets its landlord responsibilities ▪ Clients can meaningfully influence, using their insights and experience
<p>Governance Client Experience and Impact Committee membership role for clients</p> <p>Review Terms of Reference and consider how long clients serve and how we select, induct and support new representatives.</p>	Director of Client Services	<p>Ongoing</p> <p>April 2025</p>	<p>2 committee members have lived experience</p> <p>Agree succession, selection and induction plans</p>	Achieved during the first strategy and now "Business As Usual".
<p>Focus groups Client specific focus groups on topics important to them</p>	<p>Director of Client Services</p> <p>Housing & Support Managers</p>	Winter 2024/25 onwards	<p>10 focus groups take place during period of the three year strategy.</p> <p>Focus groups can be in person and on line.</p>	<p>The Client Forum will identify topics for the focus groups.</p> <p>Director of Client Services and Housing and Support Managers will ask clients about what interests and matters to them and develop a program of focus groups.</p>

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Organisational				
<p>Recruitment</p> <p>Review the policy on client engagement in staff recruitment.</p> <p>Develop an implementation plan for the new policy on client engagement, and involvement in staff recruitment</p>	Director of Client Services	June 2025	<p>Policy updated and agreed.</p> <p>Implementation plan agreed.</p> <p>Number of clients trained in recruitment and selection (with a target of 15 during the strategy).</p> <p>Number of recruitment and selection campaigns that have client involvement</p>	<p>The labour market in Surrey is very challenging so we work to tight timescales to avoid losing good applicants. We offer interviews as soon as suitable candidates apply, rather than working to fixed interview dates. This has made it hard to involve clients.</p> <p>We agreed to need a pool of clients who are trained in recruitment so they can participate with confidence.</p> <p>We will also involve clients by:</p> <ul style="list-style-type: none"> ▪ Reviewing job descriptions with them ▪ Agreeing interview questions ▪ Prioritising the posts clients are directly involved in interview panels to maximise impact
<p>Maintenance</p> <p>Feedback on day to day responsive maintenance repairs to continue using Pyramid Messenger.</p> <p>Our annual Client Survey also asks about people's experience of repairs.</p> <p>We will publish our performance and clients' views of our repairs service and our</p>	<p>Director of Asset Management & Capital Development</p> <p>Performance Data Manager</p>	<p>Ongoing</p> <p>Annual (summer/autumn)</p>	<p>Responsive repairs feedback in place with evidence of improvements made</p> <p>Improved satisfaction levels (through the Client Satisfaction Survey)</p>	

Key area	Led by	By when	KPI/ Measure of Success	What's involved (why things may not have been achieved, what we might do differently)
repairs performance (and actions taken to improve these) on the website.		Annual	Tenancy Satisfaction Measures (TSMs) show we are meeting our targets for completing responsive repairs.	
<p>Maintenance</p> <p>Consult on specifications for Kitchen and Bathroom replacement program.</p> <p>Develop a process to include clients when developing service standards for investment programs and new long-term contracts that will affect their homes.</p> <p>Produce information for clients on work to improve energy efficiency and consult on options for their homes.</p> <p>A design brief for shared houses is developed that describes the standards Transform will meet (decorative condition, facilities, furniture) so that we offer “psychologically informed physical environments”.</p> <p>Clients are trained and undertake audits to assess how our shared properties meet the design brief.</p>	<p>Director of Asset Management & Capital Development/ Asset Manager (Planned Investment)</p> <p>Director of Client Services/ Client Forum</p>	<p>July 2024</p> <p>Jan 2025 + ongoing</p> <p>January 2026</p> <p>April 2026</p>	<p>Clients have a choice of colours, work tops and flooring.</p> <p>Clients have the information they need to make choices about energy efficiency improvements to their homes.</p> <p>Clients are satisfied with their homes and feel safe</p>	<ul style="list-style-type: none"> Psychologically Informed Physical Environments are welcoming and designed so that clients feel safe, comfortable and valued in their homes.

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<p>Communications Enhanced partnership working within the organisation utilising the voice of lived experience at internal and external events.</p> <p>Involvement in Website development and Social Media, including Client Blogs</p>	Head of External Affairs and Communications	Ongoing	<p>Lived experience and stories shared across all social media platforms</p> <p>Client Blogs promoted</p>	
<p>Fundraising Our Fundraising Strategy will include involving clients and ensure their needs and views are reflected in our work.</p> <p>We will work with clients to develop “cases for support” to ensure fundraising requests are authentic and reflect clients’ priorities.</p> <p>We will develop role descriptions to help clients get involved in local and community fundraising</p> <p>We will include clients in bid preparation and presentations</p> <p>The Fundraising Executive will report to the Client Forum at least twice a year.</p>	Fundraising Executive	April 2024 + ongoing	<p>Client Forum members approve the fundraising strategy</p> <p>Number of new bids and grants influenced by clients</p> <p>Fundraising role descriptions agreed</p>	
<p>Peer mentoring Develop a process for mentoring with ex-clients providing peer support for new clients, including:</p> <p>Role descriptions developed</p>	Director of Client Services/ Policy & Performance Manager	December 2025	Peer mentors role descriptions agreed	We may need to secure additional funding to deliver an effective peer mentoring program if the evaluation is positive.

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<p>Training developed for clients</p> <p>Peer mentors recruited and peer mentoring piloted in at least two services.</p> <p>Evaluation completed</p>		<p>January 2026</p> <p>June 2026</p> <p>January 2027</p>	<p>Training module on website</p> <p>Peer mentors recruited and trained</p> <p>Evaluation report</p>	
Identify potential resources for an organisation-wide programme to develop peer mentors	Director of Client Services/ Fundraising Executive	March 2027	Funds received for new service/ Peer mentors available across Transform by Jan 2027	<p>We will need to base fundraising on the evaluation to have a very clear proposal in order to cost it and develop evidence-based bids.</p> <p>It will be important for clients to be involved in shaping the service and the bids.</p>
<p>Quality improvement</p> <p>Improving upon quality assurance processes, developing a process for client's involvement in local service peer audits</p>	Policy & Performance Manager	January 2026	Internal audit programme rolled out with clients involved in the process	<p>Having clients trained and supported to undertake Quality Assurance audits aligns with our values of empowerment, respect, responsibility and excellence. These would look at policies and practices around safety and quality of services, for example:</p> <ul style="list-style-type: none"> ▪ Safeguarding ▪ Risk assessment, risk management and responding to incidents ▪ Support planning and achieving outcomes for clients (including the use of the Outcome Star and other tools) ▪ Complaints handling ▪ Lone working

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Local involvement activity				
<p>Local fundraising</p> <p>The Fundraising Executive will support managers to organise and report on local fundraising activity:</p> <ul style="list-style-type: none"> • Number and type of activities • Number of clients involved • Feedback from clients (and staff) on the benefits and achievements 	Housing & Support Managers	December 2022	<p>All planned local community activities for fundraising to involve at least two clients</p> <p>Fundraising activities comply with the Fundraising Regulator's standards</p>	
<p>Local client engagement activities and events</p> <p>Events will provide opportunities for clients to engage informally and can be in-person, on Transform premises, in the community, or online to reflect clients' needs and preferences.</p>	Housing & Support Managers	Ongoing	Every service to hold events. At least one per service should be in-person.	Engagement events provide opportunities for clients to speak with each other and staff about what's important to them and what they'd like to influence and change. These conversations can be more informal and easier for some clients to participate in than formal meetings and surveys.
<p>Information on local contracts & plans provided to clients for:</p> <p>Maintenance/gardening/cleaning and cyclical works specifications</p> <p>Consultations on the service contracts and plans for shared gardens/ redecorations of shared houses etc. held</p> <p>Regular feedback on the performance of local contracts gathered through regular meetings in shared houses</p>	<p>Director of Asset Management & Capital Development</p> <p>Housing & Support Managers</p>	Winter 2024/ 25 + ongoing	<p>All services have clear specifications in place which are visible to all clients.</p> <p>Clients are able to hold Transform to account</p> <p>Improved service quality and client satisfaction</p>	<p>We should produce summary documents to state how often gardens are attended, what is included and how often communal areas are cleaned.</p> <p>Regular house meetings should happen – clients should be consulted on and involved in how to use gardens, redecorations and kitchen and bathroom replacements in shared houses etc.</p> <p>There should also be information about cleaning products and equipment provided in shared houses.</p>