HACT

Network Homes

Optimising resident feedback

Developing a resident feedback framework to optimise business delivery

December 2020

Resident feedback and the White Paper

On 17 November 2020 the Government launched their Social Housing White Paper, entitled *The Charter for Social Housing Residents*.[1] A common theme across the seven chapters that comprise the White Paper was the fundamental importance of transparency and meaningful engagement with residents.

There are clear implications for resident feedback within the White Paper which we would be remiss not to include in this report:

- there is a commitment to a strengthened, and proactive regulatory regime to uphold standards, requiring social housing organisations to gather the necessary resident insights to demonstrate performance.
- there are plans for tenant satisfaction measures for landlords to measure the things that matter to residents.
- there is a clear requirement for social housing organisations to ensure effective resident engagement across the sector. This engagement should empower residents to influence service design and hold their landlord to account.

How this paper responds

The framework set out in this paper is designed to be used to assess how your feedback model is supporting your performance as a social housing organisation.

Its purpose is to help social housing organisations re-align feedback as a tool to better deliver on your responsibility to residents and transparently demonstrate to the regulator that your organisation is meeting and exceeding standards.

As set out in section 3.4, there is a need for a new set of satisfaction measures on the things that matter to residents. This is the right time for the sector to be proactively self-critical about the feedback it gathers.

As the paper also highlights in section 3.5, this is also an opportune moment for the sector to come together and work with residents and the regulator to build a feedback model that improves service design, so that resident voice is at the heart of decision-making.

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1   See: https://www.gov.uk/government/publications/
    the-charter-for-social-housing-residents-social-
    housing-white-paper/the-charter-for-social-
    housing-residents-social-housing-white-paper

Contents

Summary

Network Homes commissioned HACT to research how resident feedback could be put to more meaningful operational use. This report goes further and proposes a resident feedback framework we believe can be applied across the social housing sector.

Section 1 sets out the background to this paper, including the issue itself, the methodology and a note about terminology.

Section 2 provides the headline findings, including measures, channels and surveys used for capturing resident feedback, as well as what social housing organisations did with this feedback.

Section 3 outlines the five stages contained in the framework for resident feedback.

1: Why are you collecting resident feedback?
To use feedback to improve your services you need an organisational culture that values ongoing resident feedback. You also require resourcing not only in terms of the number of staff, but also staff with the relevant skills to analyse and apply the findings to the business.

2: Who are you collecting feedback from?
You collect feedback primarily from your residents, but inaccurate and outdated data about residents results in misinformed business decisions. You can resolve this through resident profiles, resident journey mapping and data standards.

3: How are you collecting resident feedback?
Different types of surveys can provide useful insights about your residents. The challenge is how you make every contact count. Resident sentiment analysis is one tool that can facilitate this process, although we need to create a new taxonomy for it based on the experience of social housing residents.

4: Which metrics do you need to use?
The metrics you use should be able to reflect the different shapes and sizes, focuses and priorities of every housing association. Concerns about the metrics currently used in the sector are well known. We need to develop a new set of metrics that cover the breadth of social housing's activities.

5: What are you doing with resident feedback?
Instead of benchmarking, shift your focus onto your residents and create a virtuous circle of feedback: you provide a service, they respond, you improve, you tell them how you've improved the service, they respond, and so on.

It's clear there is a lot of good work being done around resident feedback. The response of social housing organisations to the Covid-19 pandemic and their engagement with their residents provides an unprecedented opportunity. This framework lays the basis for them to build on that engagement and implement a resident feedback model that has the experience of residents – and their voice – at the heart of the business of social housing.

1   Introduction

How can resident feedback be put to more meaningful operational use?

This was the question Network Homes commissioned HACT to answer towards the end of 2019. They wanted to examine why social housing organisations collect resident satisfaction data, how they decided which measures and methods to use, as well as how they communicated and acted on their findings.

This report is based on the outcomes of that research. It also incorporates the findings of a series of roundtables we held in May 2020 that looked at the role of resident feedback in social housing's response to the Covid-19 pandemic.

HACT is no stranger to the issue of resident engagement and feedback. In 2018 we published *Rethinking customer insight: Moving beyond the numbers*.[2] We argued that resident feedback needed to be redesigned to facilitate continuous improvement, rather than being used as a metric to retrospectively demonstrate good service standards.

This report goes beyond that, proposing a way forward for the social housing sector, identifying a new resident feedback framework.

1.1   The issue

The issue of how to make resident feedback more meaningful is not a new one for the social housing sector. There is a fundamental paradox between the lived experience of social housing residents and the framing of them as customers. The former involves a complex set of relationships and experiences, while the latter results in a model of feedback and engagement based around consumers.

The role social housing plays in the lives of residents is different to the self-contained way we consume other products and services. Resident feedback needs to reflect that complexity, while enabling social housing organisations to fulfil their social purpose.

The social housing sector relies on satisfaction and other retroactive feedback measures as a means of informing service design. This risks abstracting the business of social housing from the varied and complex ways that residents experience services.

1.2   The response to Covid-19

The social housing sector's response to the Covid-19 crisis has emphasised the need for change. We estimate that over 1.3 million welfare calls were made by the social housing sector between the start of the crisis and the end of May 2020.[3]

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2   See: https://www.hact.org.uk/sites/default/files/Beyond_Customer_Insight_vFinal.pdf

3   https://hact.org.uk/news/more-calls-more-support-more-impact

At the beginning of the crisis, preconceptions about the needs of different resident demographics informed the way the sector responded. The priority was on mobilising teams to conduct welfare calls and deliver crisis support. Instead, the calls revealed a more nuanced picture of hardship. Consequently, some social housing organisations have decided to extend these calls and incorporate them into other areas of their work as they remobilise and look to return to some sort of business as usual.

In doing so, the way we ask for feedback and the insights we gather have to be able to accommodate this complexity of lived experience, while simultaneously being flexible to rapidly changing landscapes.

1.3 Methodology

We used a range of research methods for this project:

- an online survey answered by 39 social housing organisations, asking how they approached and used resident engagement;
- interviews with 20 housing association employees involved in resident feedback, insights and business transformation;
- roundtables with 14 housing association representatives, exploring the role of resident feedback in their response to Covid-19.

1.4 Terminology

Across the sector, the terms *residents*, *customers*, *engagement* and *feedback* are defined in different ways. These differences were reflected in the responses to our research questions.

Often these are more than just differences in language. They reflect varying perceptions about the role of social housing, the value of insights and the relationship between residents and their social landlords.

The framing of residents as customers has become commonplace across the sector, while recognising the fundamental differences between residents as commercial customers and their experiences as social housing residents. While external consumer feedback models can provide insights, they don't reflect these fundamental differences which have become amplified through the role social housing has played in responding to Covid-19.

In this paper, we use the term *resident* instead of *customer*, whilst acknowledging the use of *customer feedback* and *customer engagement*. This reflects the need to build a more holistic feedback framework based on the role social housing plays in the lives of residents beyond the transactional. Every interaction between resident and social landlord is an opportunity to gather insights so feedback and engagement become seamlessly integrated.

2   Headline findings

We asked 39 organisations about their current approaches towards resident engagement, as well as interviewing 20 individuals involved in the collection, analysis and use of resident feedback.

Overall satisfaction remains the dominant headline measure used to measure the resident experience (see figure 1). Those who have adopted alternative measures like NPS, customer effort and UK CSI tended to be medium to large social housing organisations.

Figure 1: Measures used to quantify resident experience

Key

| ■ Overall satisfaction | ■ Net Promoter Score | ■ Customer effort | ■ UK CSI |

97% Overall satisfaction
41% Net Promoter Score
23% Customer effort
18% UK CSI

All respondents
(n=39)

100% Overall satisfaction
0% Net Promoter Score
33% Customer effort
0% UK CSI

Respondents with > 50,000 homes
(n=6)

100% Overall satisfaction
50% Net Promoter Score
33% Customer effort
17% UK CSI

Respondents with 20,001-50,000 homes
(n=6)

100% Overall satisfaction
67% Net Promoter Score
42% Customer effort
50% UK CSI

Respondents with 10,001-20,000 homes
(n=12)

100% Overall satisfaction
40% Net Promoter Score
0% Customer effort
0% UK CSI

Respondents with 5,001-10,000 homes
(n=5)

90% Overall satisfaction
30% Net Promoter Score
0% Customer effort
0% UK CSI

Respondents with < 5,000 homes
(n=10)

Most organisations use both transactional as well as perception surveys (see figure 2) to capture resident feedback. In interviews there was considerable doubt about the practical value of perception surveys, at least in terms of service design.

Just over half of organisations (51%) conducted their surveys using internal resources. Organisations with stock over 50,000 homes were more likely to use external companies while those with stock under 20,000 homes were more likely to use their own resources.

Of those conducting research in-house the favoured channels were post, phone and email (see figure 3). For those using external agencies, the favoured channels were phone, email and online (see figure 4).
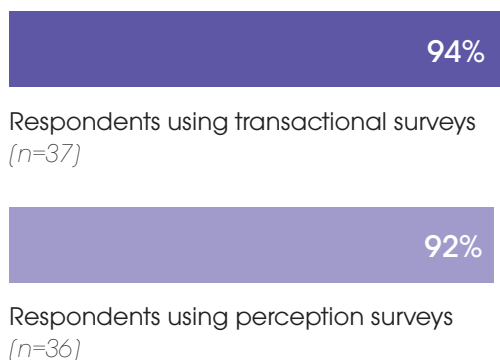
Figure 3: Channels used by those conducting surveys in-house [n=20]

Channel	%
Postal survey	85%
Phone survey	85%
Email survey	60%
Online survey	55%
SMS text	50%
Face to face	55%

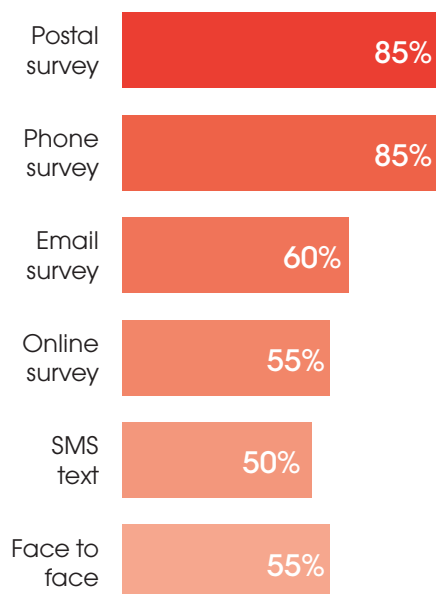*Figure 4: Channels used by those conducting surveys externally [n=19]*

Channel	%
Postal survey	42%
Phone survey	89%
Email survey	84%
Online survey	68%
SMS text	58%
Face to face	42%

Figure 2: Surveys used for resident feedback

	%
Respondents using transactional surveys *(n=37)*	94%
Respondents using perception surveys *(n=36)*	92%

Figure 5: How feedback is used [n=39]

87%
To influence themes for internal service improvement within key services

85%
To influence decisions on where to dedicate resources to service improvement

71%
To inform the design of services

66%
Guiding areas for resident scrutiny

64%
Contract management

64%
To influence themes for internal service improvement across multiple areas

41%
Public relations

21%
Sales and marketing
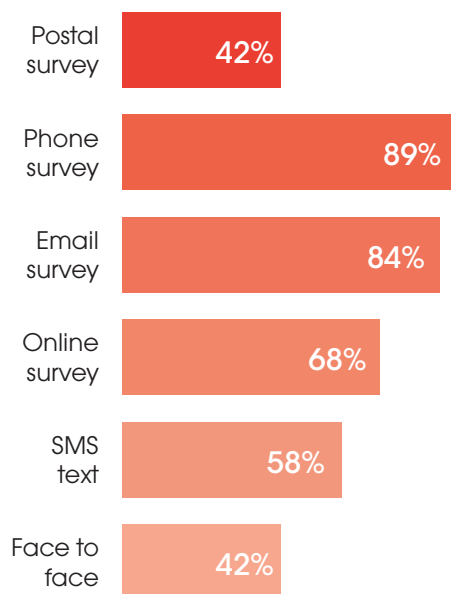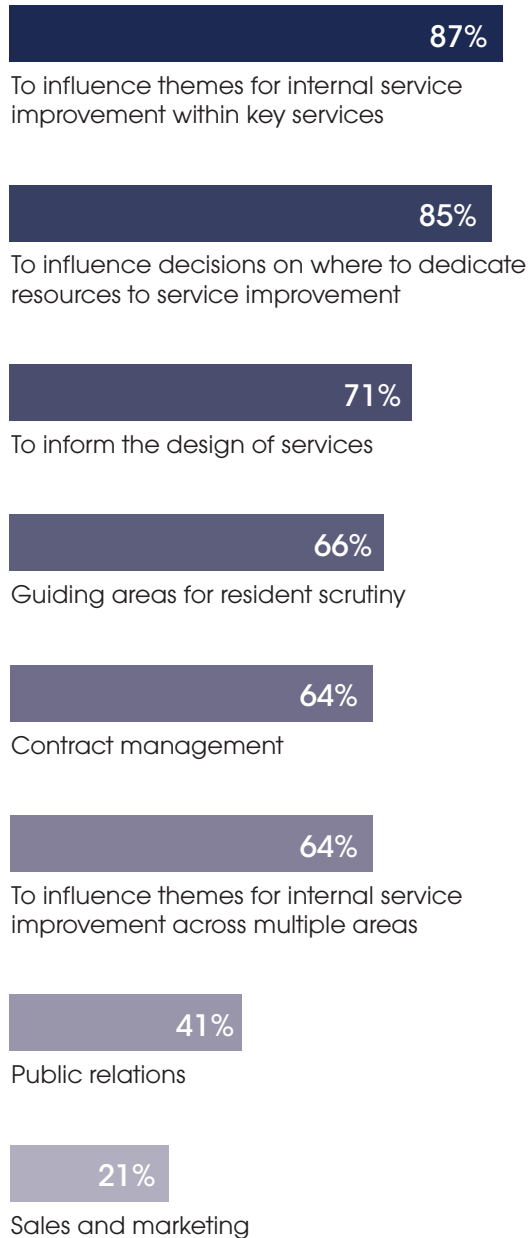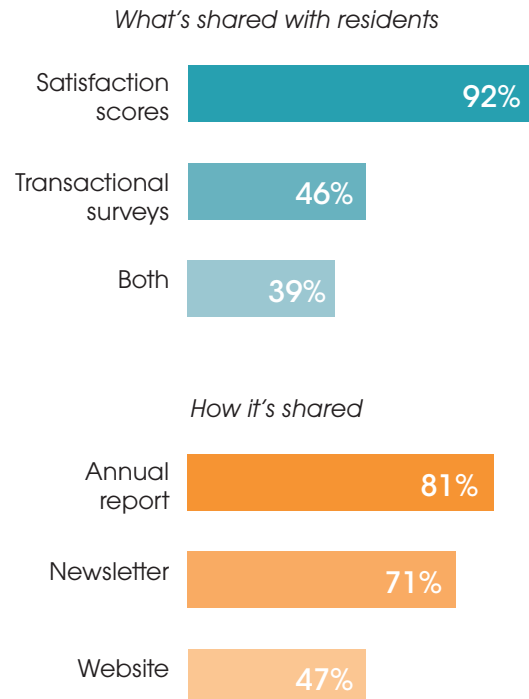
A clear majority of organisations reported that they used feedback to inform service improvement and influence decisions about the allocation of resources and time on service improvement (see figure 5). Interviewees said they used feedback to compare repairs and maintenance contractors, which was the most common and clear example of feedback being used in the business.

Over 90% of organisations shared satisfaction scores with their residents, while just under half shared transactional survey scores (see figure 6). The most popular means of sharing

Figure 6: What results did organisations share with residents, and how [n=38]

What's shared with residents

Satisfaction scores — 92%

Transactional surveys — 46%

Both — 39%

How it's shared

Annual report — 81%

Newsletter — 71%

Website — 47%

these results was through annual reports, followed by newsletters and websites.

We asked organisations which benchmarking approaches they participated in. Just under 60% said Housemark, with only a quarter taking part in the sector scorecard. In interviews, participants expressed doubts about the value and legitimacy of benchmarking comparisons between organisations, because of varying operating contexts, inconsistent reporting and the lack of transparency in survey methodologies.

Figure 7: Participation in benchmarking [n=39]

59%
Housemark

25%
Sector scorecard

18%
UK CSI

13%
None

10%
Other

2.1   Benchmarking

Benchmarking can be impactful where it can be used to drive insights and make meaningful comparisons. When we asked organisations where benchmarking worked, they identified common problems and opportunities around benchmarking across the sector.

- *Transparency and consistency*
  Core problems are inconsistency in methodology and transparency across the sector. Making meaningful comparisons between organisations requires trust that the metrics are comparable. Without this, organisations are reluctant to draw meaningful insights from benchmarking.

- *Comparing like for like*
  With organisations operating in very different geographic contexts, it's hard to make meaningful comparisons and to isolate the impact of social housing organisations from the wider context of residents' lives. Several organisations told us they conducted benchmarking at a local or regional level using STAR survey results to compare against other providers. With a degree of similarity in the context, this was cited as an example of how benchmarking could be more actionable. The issue of transparency is also a problem here. It's possible to identify organisations of a similar size, geography, or business model. Yet, the current lack of transparency around methodology makes it challenging to identify whether one of these organisations uses similar methods.

- *Taking action*
  Benchmarking is of value when it drives improvement. Without trust in the validity of benchmarking across the sector, organisations struggle to use these metrics to highlight areas for improvement.
- *Internal benchmarking*
  With most organisations choosing not to benchmark against other organisations, they nonetheless saw real value in internal benchmarking to track change over time. STAR surveys were identified as valuable for this purpose, to assess changes in overall satisfaction amongst tenants. Organisations use internal dashboards to hold themselves to account.
- *Rationale*
  The push to benchmark came primarily from an executive or board level as a means of monitoring performance. However, many board and executive teams also have doubts about the accuracy of cross-sector benchmarking. In most cases, even where benchmarking was being used, those we spoke to could not identify many cases where benchmarking was used to inform decision-making.

2.2   Feedback methodologies

From our research, we were able to identify five reasons why different social housing organisations adopt different methodologies.

Purpose: Whilst the common denominator between all is the provision of homes, the wider social purpose and business priorities of organisations varies. Consequently, the purpose behind the collection and collation of resident feedback differs between different organisations.

Geography and scope: The concentration and spread of stock leads to social housing organisations having different relationships with their residents and communities. Larger organisations with dispersed stock tend to have developed methodologies to track overall performance, whilst also needing to be able to speak to the different contexts in which they operate. By contrast, place-based organisations tend to be more embedded in a specific community, which impacts the methodologies that they employ.

Resource: As with their differing strategic aims, so organisations tend to have different levels of resource that they devote to feedback activities. Consequently, this has an impact on the methodologies that they tend to use.

Relationship with residents: The relationship between resident and landlord varies between social housing organisations. In supported housing that relationship is far closer, with greater responsibility on the housing association. For general needs homes, the relationship can be largely limited to income and maintenance interactions. Each tenure type requires a different level of insight. It's important to note that in many

cases, Covid-19 has led to a far higher level of interaction across the board, and seen many social housing organisations look to gather a wider range of feedback insights.

Legacy of previous recommendations: the methodologies chosen will also reflect previous recommendations that have been made to different social housing organisations.

It's clear that a variety of factors have shaped current methodological approaches to resident feedback. What should be consistent in the future is the ability to draw a line between context, purpose and feedback, to ensure feedback is enabling the organisation to operate better for its residents. This will be based on having a reliable set of insights and being transparent about your chosen methodology.

In the next chapter, we outline a framework that can be used to re-evaluate or developed approaches to resident feedback.

This doesn't mean abandoning existing ways of working, many of which have been designed in response to operational and strategic challenges. Instead, the framework is about looking to the future and ensuring feedback works and speaks to the priorities of residents, the business and the regulator.

2.3   The impact of Covid-19

The Covid-19 pandemic has significantly affected how the social housing sector operates and engages with residents. In July, HACT and the Centre for Excellence in Community Investment released the second set of impact measures collected from 70 social housing organisations representing over a third of total UK housing stock.[4] These organisations had made over 490,000 welfare calls between the middle of March and the end of May, an average of 7,115 each.

According to many of those participating in roundtables run and hosted by HACT and the Centre for Excellence in Community Investment, these calls resulted in a positive shift in resident perceptions about the role of social housing organisations. This reflected the active role they had taken not just in delivering food and medicine, but also in proactively offering support and advice.

As well as undertaking this piece of research, HACT has been working with PlaceShapers since April 2020, exploring how their members responded to the crisis and their future role in the recovery and reset of communities. We have heard from numerous organisations how welfare calls had provided them with a new means of capturing feedback, offering opportunities to interact with a cohort of residents with traditionally low engagement.

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4   ibid

One outcome has been housing associations deciding to continue to take a more active stance on engagement, with discussions across organisations about how to incorporate resident engagement into their day-to-day work. This desire to be more active and engaged is based on the underlying principle that housing associations want to know what issues their residents are facing and want to make sure they can respond.

In making thousands of calls to residents, more staff have become more engaged, committed and dedicated to their organisation's broader social purpose. This is an opportunity for organisations to build the foundations of a new relationship, one that addresses some of the failings and shortfalls identified in the Hackitt Review and subsequent Green Paper. For many, this has also been a chance to invest in a more human relationship with their residents.

Some organisations have also chosen to accelerate the changes to resident engagement that had been identified as priorities prior to Covid-19. The impetus for these changes was that the stakes were higher and internal barriers, and resistance, to change were removed. In a period of unheralded energy and momentum, the sector quickly adapted its way of working to meet the challenges it faced.

At the same time, it has been a dramatic learning curve, with redeployed staff conducting welfare calls, new systems being implemented to capture data, and referrals being made internally and externally for emergency support.

Prior to Covid-19, a number of colleagues talked about the importance of digital channels and how digital inclusion had to be addressed to ensure everyone had the same access to online support and advice.

During the Covid-19 crisis, this changed. First, once lockdown was introduced, digital became a necessity rather than a choice. Secondly, participants discovered that their understanding of digital engagement was wrong: through welfare calls, they found that more residents were digitally connected in some way than had been previously reported in surveys.

At the same time, the focus of digital disconnectivity broadened to include young people, many of whom found themselves without access to free wifi hotspots once fast food restaurants and libraries closed. Efforts to address these inequalities – which also include the lack of devices – have begun to be addressed through device donation schemes, mobile data provision and affordable or free wifi.

While the number and frequency of welfare calls is likely to reduce, the experience has demonstrated how every point of interaction presents an opportunity

for social housing organisations to gather insights and feedback. It has also highlighted the critical importance of consistent and standardised resident data.

Resident engagement will play a critical role in the ongoing response to the Covid-19 pandemic and long-term recovery and reset of our communities. The easy option would be to return to business as usual.

Instead, resident engagement can provide the real time, cumulative intelligence needed to understand the needs and lived experiences of social housing residents.

The challenge is to develop a framework for resident engagement that delivers this.

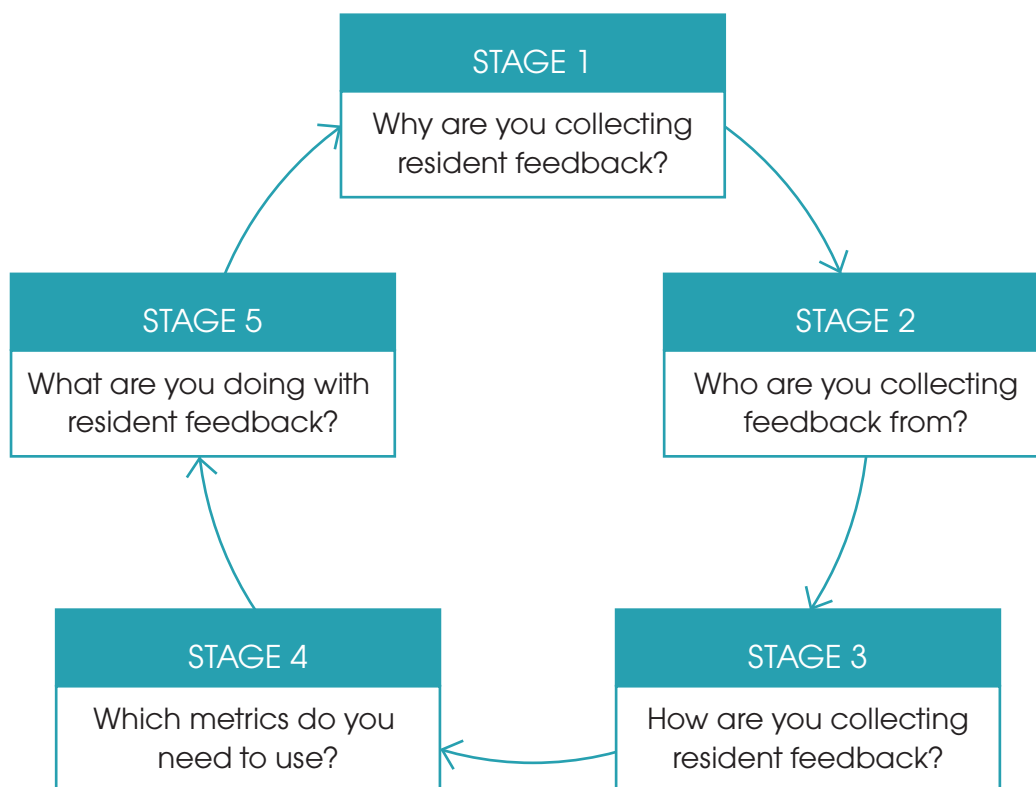# 3 The resident feedback framework

Using the feedback from our research we have developed a framework to optimise resident feedback. This is not based on any single process or methodology for engagement. Its application will not depend on the size, geographic spread and brand positioning of each individual social housing organisation. Instead, the framework identifies five stages so that resident feedback can be put to more meaningful operational use.

The framework is designed as a starting point for social housing organisations seeking to re-evaluate their use of resident feedback.

They should be able to provide answers to each of the framework questions, whether in response to residents, staff or the regulator.

The framework starts at stage one: why are you collecting resident feedback? How are you ensuring the feedback you're gathering is informing how you operate, whether you're focused on community investment initiatives or building new homes. Understanding and defining this stage will ensure you have the right resources in place internally, so you can translate resident feedback into service design and improvement.

Figure 8: Proposed resident feedback framework

STAGE 1
Why are you collecting resident feedback?

STAGE 2
Who are you collecting feedback from?

STAGE 3
How are you collecting resident feedback?

STAGE 4
Which metrics do you need to use?

STAGE 5
What are you doing with resident feedback?

The next stage seems simple: who are you collecting this feedback from? Clearly, you need to be asking your residents, but there's more to it than this. This is about ensuring the information you have on your residents is accurate, collected in a standardised format, and enables a single point of view for every resident across the organisation.

Stage three looks at the methodology you're using to collect this feedback. Traditionally, this has involved transactional or satisfaction surveys. Business and cultural change can take time, and legacy systems and methods can endure even as new opportunities, software and techniques emerge. In the wake of the sector's response to Covid-19, there's an opportunity not only to re-conceptualise engagement so that every interaction is used as a source of insight, but also to be more proactive in testing and adopting innovative techniques, such as sentiment analysis.

Stage four is about the metrics that you choose. What are you measuring? Most of the current metrics that are used are not applicable to all housing associations as they don't reflect their business priorities – why measure the number of homes you've built if house building is not one of your corporate objectives? There is a need to develop a menu of measurements that can be used and applied according to the needs of each individual social housing organisation.

The fifth stage is about what you then do with this feedback. The obvious or traditional approach is to publish the figures in your annual report or use them to benchmark your organisation. The problems with this approach are well rehearsed: inconsistencies in collection, comparing apples with pears, encourages mediocrity. Critically, the focus of what you do with your feedback shouldn't be external, in how you compare with others in your sector. It should be internal, on using resident feedback to inform the design and improvement of your services, and then telling your residents why and how you've made these changes.

Each stage does not sit independent of the others. In fact, you might find yourself returning to stage two after determining stage three, for example. In this way, the framework can either act akin to a checklist, or as an interconnected, circular process so that once you finished with stage five, you can return back to stage one again.

On the following pages, we look at each of the stages in more detail. In doing so, we also review how organisations have implemented or developed strategy responding to these key questions.

Whilst every organisation operates in a unique context it is valuable to learn from others good practice. The staff we spoke to understood some of the day-to-day barriers to implementing an actionable feedback model, and have, as a consequence, developed unique solutions.

3.1 Stage 1: Why are you collecting resident feedback?

The research highlighted that the primary purpose of engaging with residents was to improve services. For this to happen in practice, organisations need to ensure satisfaction measures don't become internalised benchmarks of success that are pursued for the wrong reasons. Instead, they need to create a business culture that has improving residents' lives at its heart.

According to interviewees, this is not always the case. They reflected that resident engagement teams could at times be peripheral to the business and that their input and insight was not fully utilised. Consequently, they struggled to share insights with their colleagues that might inform business strategy.

To resolve this, it's critical to **develop an organisational culture that values ongoing resident feedback**. Where this has worked, it was driven by senior leadership that enabled engagement teams to do their job effectively.

This is predicated on adequate resourcing. Some interviewees had struggled to properly analyse and respond to insights from residents because of limited resources,

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CASE STUDY: Setting a culture

A common thread throughout our interviews was the need to create a culture of insight-led action, accountability and continuous improvements. Barriers to this included the challenge of getting other departments to view feedback as constructive, doubts about the accuracy of research or the under-resourcing of feedback teams.

Nonetheless, we heard that some organisations were tackling this head on with ambitious plans to bring resident insights to the heart of the business. Led from the top, one organisation had implemented a new core strategic objective: to improve trust between residents and the housing association. Building on the recommendations of the social housing green paper and the Hackitt review, this objective demonstrated that the organisation wanted to prove to residents why it could be trusted by listening and acting upon insights.

It's evident that the first step has to be that strategic buy-in. This empowers feedback teams to work with residents and collaborate with colleagues.

including a lack of key skills in data science and analytics. A similar resource issue related to recruiting and retaining staff with the desirable skills.

Resourcing for resident engagement teams should not only include adequate numbers of staff, but also sufficient skill sets. This will ensure their role is not just confined to producing, distributing and collating surveys, but also to analysing these results and applying them to the business. This was emphasised by many of the organisations we spoke to, especially those going through a review of their resident feedback approach.

Prior to Covid-19, many of the smaller organisations we surveyed and interviews talked about the benefit of personal interactions and how they used face-to-face as their primary means of engagement. Overnight, face-to-face interactions finished.

They were replaced by thousands of welfare calls. Critically, many organisations provided space within these calls for a less structured conversation, which resulted in more nuanced insights about the issues residents were facing, while building a more honest relationship between residents and the housing association.

CASE STUDY: Skills, capacity and resources

Organisations we spoke to had a range of staff resources and expertise. Many were aware of the need to get the balance right, between staff skilled in communicating with residents, and the necessary skills, capabilities and tools to remove some of the time-consuming leg work around data collection and analysis.

Data skills was they key area for improvement. One organisation was in the middle of drawing up a new strategy, investing in IT and training for its customer insights team and exploring opportunities for a new data analyst.

At the heart of this transformation was a recognition by the board and executive team that they needed to be more insight driven. However, they recognized that there were everyday operational barriers to achieving this strategic goal. Up-skilling and empowering the team with new tools and support was a way of recognising that the existing knowledge and expertise within the business was being under-utilised.

At the same time, another issue identified prior to Covid-19 was different parts of the business acting in silos, divorced from the experience of residents, pursuing their own priorities.

During Covid-19, the number of frontline staff working in social housing expanded rapidly, as organisations redeployed staff from across the business to make welfare calls to residents. This enabled organisations to signpost residents to a variety of support, from food parcels and medical supplies, to mental health advice and financial support.

One unintended consequence of this was to bring staff who had previously had no relationship with residents into direct contact with them. These welfare calls, and the reaction of staff to being more involved with residents, have changed the internal dynamic in many organisations. Whilst the level of resource needed to sustain this frequency of contact is not viable over the long-term, there are opportunities to shift the paradigm of contact from being reactive and routine, to also becoming proactive and conversational.

In the short term, the needs and experiences of residents should be the common denominator for operational parts of the business.

CASE STUDY: Change for the future

Speaking to one organisation that had adopted an ICS methodology, we heard that there had initially been hesitancy when the first returns came in, with a marked discrepancy from previous years.

Replacing an existing methodology can uncover new insights about the resident's experience. It requires a commitment to the future, and a long-term plan to improve performance over time.

This organisation had a clear rationale behind adopting a new methodology- improving the resident experience. There was no quick fix, and they decided to adopt a feedback methodology which could more accurately track this journey.

If you can be transparent about your rationale, re-establishing a set of baseline metrics around the resident experience can be an opportunity to build for the future, and be more accountable to your residents. Full buy-in to the vision, and patience across the business is really important.

3.2 Stage 2: Who are you collecting feedback from?

Our research identified fundamental issues at the heart of resident feedback: inaccurate and outdated resident data resulting in misconceptions about the lives of those living in social housing. Any business decision informed by resident feedback can only be actionable when based on accurate information. If not, it runs the risk of producing a strategy that does not align with the current profile of residents. Improving the accuracy and reliability of data enables business decisions based on a representative picture of who your residents are.

Deep rooted stigmas about who lives in social housing, and their wants and needs, are hard to dislodge. They were identified in the 2018 Green Paper as a systemic issue that needed addressing.

One way of doing this is to **use resident profiles and resident journey mapping**. One organisation conducted research consisting of one-to-one interviews with residents to produce customer personas, an exercise that revealed that many of the existing preconceptions used to make business decisions were outdated. Many organisations have a mix of tenants, leaseholders or residents in supported housing. Whilst commitments to good service delivery are consistent, there will be a difference in the nature of the service provided and the relationship between the

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CASE STUDY: A more complete picture

During our interviews, and through the Centre for Excellence in Community Investment, we've heard organisations have been using the rapid increase in contact with residents caused by covid-19 to update resident data and contact information.

While many organisations wanted to play a more active role in supporting residents and communities during the Covid-19 crisis, it became clear to some that there were gaps in their data which needed addressing. To make proactive decision on interventions from food provision to employment support, housing associations have used the welfare calls to update their resident contact information data, as well as gathering data on key indicators for future work.

Covid-19 has affected individuals and families in unexpected ways. Understanding residents better, from their age, gender, household make-up and employment has allowed organisations to make future business decisions.

resident and social landlord. There will be a different rationale and purpose behind the feedback that is gathered.

Another organisation based their resident personas on different resident-organisational touchpoints. These included needing a repair, wanting to report ASB or facing financial difficulties. Their aim was to construct a picture of some of the vulnerabilities faced by residents so they could design services accordingly. While these personas might have been generalising, they were useful in bringing residents to the heart of service design.

Whichever approach is taken, **it's critical that this should be an ongoing exercise**. It's likely that resident personas will change dramatically because of the impact of Covid-19. Many organisations are already modelling future scenarios which help them identify residents who might be affected by,

CASE STUDY: Who are our residents and what do they want to tell us?
"We spoke to customers to understand their journeys and establish a set of measures that matter: we want to establish how successful we are based on the real experiences of residents."

One housing association put resident journey mapping at the heart of their business change to ensure it was operating in a way that reflected their residents. Through research and interviews with residents, they identified twelve customer journeys.

These journeys captured the range of reasons behind customers' interactions with them, such as "needs to pay rent" or "needs a repair". By mapping these journeys through each point of contact, data collection and any follow up actions, they identified impediments that were preventing feedback from being effectively actioned.

By focussing on these typical journeys, the housing association was able to ensure the feedback questions being asked were facilitating the resolution of these journeys, and the right metrics were being used to define success.

The lesson here was to begin with the resident: who are they, what is their experience, and what does a successful interaction look like. It's also about understanding how, and where, contact is made with staff across the business.

for example, unemployment. The structure of resident engagement, from the channel used to the frequency and questions asked, will help this strategic approach.

Before this happens, however, many organisations will need to resolve another outstanding issue: the lack of standardised data. Within many organisations, data about residents is held in multiple teams, across multiple spreadsheets. The ideal is to have a single point of view for each and every resident. The reality is that this is rare.

As an example, look at the process between a repairs complaint in a transaction survey before it is acted on by the organisation:
- the resident support team records the feedback and flags the complaint which is then transferred to repairs management;
- repairs managers facilitate contractors to work alongside the housing team to develop a solution, providing feedback throughout the resolution process;
- the resident support team speaks to the relevant resident to confirm that they are happy with the resolved repair.

Throughout the process, there are multiple transfers of data between internal teams. At each transfer point, the original insights might be altered, miskeyed or corrupted if there is no data standard that connects the capture of data to its operational use.

The foundation of a single point of view is data standards. **With data standards everyone in the organisation records the same data in the same way**.

This is the core principle underpinning the UK Housing Data Standards that HACT have been developing since 2018 with OSCRE and over 60 social housing partners, and which are now in their third iteration.[5]

As a sector we benefit from a range of different feedback methodologies and approaches, fit for unique contexts. However, we can agree on a common data format for the insights that are gathered. This enables you to rely on your own internal data starting point for taking action, but also for collaboration between organisations.

During the Covid-19 pandemic, a number of organisations said that the welfare calls had provided them with an opportunity to update their existing resident records. Data standards increase the value of any insights you produce, creating more opportunities for insight-informed action and service improvements.

5   The next phase of the UK Housing Data Standards will be focusing on standardising data around resident interactions, including complaints and feedback. This is another opportunity for the sector to pool its expertise to build a standard that can unlock the potential of resident feeedback.

3.3   Stage 3: How are you collecting resident feedback?

The way many organisations collect resident feedback is because that's how they've always collected it. This leads to situations where feedback channels with in-built immobility were preventing actionable insights being used because they took so long to process.

Post-transactional surveys were identified as one of the ways that insights were used to inform service design. One organisation said they used post-transaction surveys to compare the performance of three different contractors. The responses to uniform questions about satisfaction with repairs would be used to determine future contract.

Organisations are noting the benefits of rapid, online post-transaction surveys. One said they had identified significant issues about a contractor by using post-transactional surveys, which had resulted in them not using this contractor again in the future.

CASE STUDY: Fit for purpose

One of the organisations we spoke to had built a feedback methodology which was fit for purpose, by ensuring the contact medium reflected the nature of the interaction. By mapping out the types of interactions with residents, they identified what format was needed, both to make the resident feel heard and gather the necessary insights to take action.

Post transaction surveys could effectively be carried out via SMS, being quick, easy and agile. However, for feedback on ASB, emails and phone calls gave far more scope to capture the complexity and sensitivity of these issues, creating a more conversational dialogue. Meanwhile, surveying residents on new homes was suited better to an in-person visit. Being able to visit the home itself, introduce a friendly face and be proactive in seeking insights is more suited to this context.

The key lesson here was understanding the varied contexts of each interaction, and finding a medium to gather feedback which works for residents, and created an opportunity to build relationships. The challenge was to ensure that all contact options remained open, especially for those residents without the same digital skills. Also, to ensure that no matter the medium, data and insights are gathered in a consistent way.

From this perspective, post-transactional surveys are useful. Yet, by their very nature, these surveys can tend to only ask residents to reflect on the transaction as a whole, not on the individual touchpoints during the transaction.

Without this information, opportunities to fine tune services are lost. Indeed satisfaction surveying is a static, retrospective measure of the resident experience and not an entirely representative reflection of the lived experience over time.

Real time post-transactional surveys can add a new insight metric to existing transactional methodologies, by capturing additional data on the immediate experience of service delivery, acknowledging that perceptions of a past event can change over time.

Residents engage and interact with services in multiple ways, at multiple times. **At every interaction, there is an opportunity to gather feedback** if the barriers to participation have been lowered.

CASE STUDY: Digital transformation

We conducted many of our interviews before the Covid-19 pandemic. The shift to digital was already seen as an ongoing change to feedback, a process which has only been accelerated by the lockdown that began in March 2020.

Emails and texts were largely replacing letters. Online chat portals had been launched, or were a key priority for the future. Social media was seen as a new medium to gather feedback, although there was uncertainty about how to do this.

Increasingly, residents are being provided with online platforms that support a range of transactions, from the payment of rent to scheduling a repair. One organisation was developing a platform to do all of the above, and to enable online complaints. They were in the process of reviewing and adapting existing surveying methods, recognising the opportunity to more seamlessly integrate real-time feedback into interactions.

As more organisations make this digital shift, its important to consider the capability to digital platforms to gather real-time feedback. The digital shift can enable greater integration across the business.

The reaction of housing associations to Covid-19 demonstrated that they do not need to be limited to traditional models of engagement and feedback. Welfare calls created a new frontline of resident engagement, providing valuable insights when supported by consistent data capture methods.

Whilst the level of resource needed to sustain this level of contact is not sustainable far into the future, there are ways to sustain the newly strengthened relationships with residents as many continue to be impacted by the ongoing pandemic and other long term social, health and economic issues. Some housing associations are looking to adapt their neighborhood model, community investment strategy and resident engagement to reflect this shifting relationship.

CASE STUDY: Co-designing feedback

Feedback can also be a way to empower residents to take a more engaged role in shaping services. Some of the organisations we spoke to worked with representative bodies to shape feedback methodology, and review findings.

If feedback is to work for residents, the right questions need to be asked, and in the right way. One organisation regularly consulted its resident panel about the design of feedback surveys. Bringing residents into the decision making on the tone of voice, terminology and script for calls and surveys improved its dialogue with residents. In reviewing the findings of transactional surveys with the panel, they were able to bring resident engagement into the task of selecting new contractors. The result was improved satisfaction with planned works.

Another organisation identified a problem in the way complaints were raised. It was a problem highlighted by their resident panel, complaints manager and in surveys. Working with the panel, the organisation changed the process for raising complaints on their website, improving the user experience as well as response times.

Behavioural insights can shed light on the best ways to contact and engage residents in feedback. But this case study also shows its also valuable to bring the service user into the decision making process for a resident feedback methodology.

Every interaction is an opportunity to influence and improve resident wellbeing, as seen since March 2020. Social housing organisations that have taken a more personal approach during the crisis need to consider how to maintain this relationship and build on the increased levels of trust they are now enjoying. It's critical that all parts of the business buy into this approach, so that engagement can take on a more interactional, rather than predominately transactional nature.

One housing association told us they wanted to move away from "let's do a quarterly satisfaction survey" to one where "every contact counts".

Resident sentiment analysis is one approach that can facilitate this.
Resident sentiment analysis is one approach that could help facilitate this. Leveraging digital tools enables easier and less resource heavy analysis, thereby providing more opportunities for timely insights.

CASE STUDY: Proactive experience tracking

Whilst welfare calls during Covid-19 represented an unprecedented level of contact between residents and housing associations, they were not entirely unique. Many organisations invest considerable resources in their contact centres, through which there is a continued dialogue with residents on a range of issues.

One of the organisations we spoke to wanted to implement a new CRM that enabled daily reporting. They wanted to move beyond using insights that were several months old. Acknowledging that some insights do make their way back to managers, they nonetheless saw an opportunity to better utilise the learnings from these routine calls.

Social media is also an area where existing contact could be used more effectively to gather insights.

This organisation wanted to expand its definition of feedback from a formal process limited to periodic surveying, to an ongoing dialogue.

Changing the priorities of the contact centre is one way of doing this. Analytical tools are another way, using technology to more efficiently pull learnings from calls.

While sentiment analytics are becoming more common across other sectors, more work needs to be done to create a resident sentiment taxonomy based on the experience of social housing residents.

Sentiment analysis techniques involve extracting emotional insights from interactions with customers and using natural language processing to gather data on the emotional experience. Its been used in a range of sectors and contexts, from airlines to online retailers and by researchers.

For sectors where relationships matter, sentiment analysis techniques have opened the door to increased insights about the emotions underpinning relationships. In social housing, these relationships are incredibly important. Trust, reliability and a sense of community are common goals for housing associations, and are all inherently emotional.

It's by no means a tried and tested solution, but there is an opportunity for the sector to be proactive in setting the agenda, conducting research and trials to ensure innovative solutions work for social housing and the nature of the engagement between residents and their housing provider. Rather than being limited to software solutions designed for other sectors, the social housing sector can be proactive now about defining how these solutions should work for residents and the business.

There are increasing opportunities to utilise tools that can support feedback as a proactive exercise. Real-time insights and sentiment analysis are two forms of feedback that sit outside of the traditional model of surveying. Alongside more traditional methodologies, these feedback approaches can allow housing associations to take proactive action, but also react and adjust retrospectively.

The key learning from the UK Housing Data Standards project is that its easier to do the groundwork now, rather than be limited by off-the-shelf solutions down the line. HACT is seeking interested partners to conduct research and run a pilot to explore these emerging opportunities, such as sentiment analysis.

3.4 Stage 4: which metrics do you need to use?

Some organisations continue to use overall satisfaction scores to measure the resident experience. Such limited and simplistic metrics don't provide the scope for a more complex feedback that accommodates the role housing associations play in creating communities and delivering services.

Other organisations use net promoter scores (NPS), which acts as a loyalty metric asking residents if they would be likely to recommend the housing association to their family or friends. While NPS provides some

insights into the reasons for residents being promoters or detractors, they do not have the same degree of consumer choice and there is a need to acknowledge and account for this difference.

The metrics you use should be those that best provide actionable insights to improve the lives of your residents. Whilst there are some important learnings to take from non-housing approaches to customer engagement and feedback, social housing is different. And the metrics you use should reflect this.

Housing associations face the challenge of communicating to residents the scope of their work, from placemaking to repairs. It is difficult to neatly separate this work and capture its value in a simple metric scale. Wellbeing and behavioural performance measures can provide a route around this problem, by focusing on the real impact services have on residents' lives.

At the same time, we need to recognise that social housing organisations come in different shapes and sizes. Some will be

CASE STUDY: Perception and trust

The relationship between a housing association and a resident is not easy to define. It's broader than a single transaction and residents are unlikely to interact with staff across the business. Putting a value on that relationship is a challenge, but is nonetheless important. As one organisations noted, the relationship can last generations, with perceptions and trust shaped by multiple experiences. This organisation wanted to make great customer experience a core strategy goal.

They surveyed residents about the relationship, asking how they felt about the prospect of contacting the housing association. The results provided a baseline from which the organisation could measure its efforts to improve the overall experience. By using an ICS survey and randomly selecting residents, the organisation is looking to create an honest baseline understanding of this relationship.

Ultimately a good relationship means residents are more likely to engage, provide feedback and feel supported by their housing association. We've heard many organisations speak about the impact of Covid-19 on that relationship. As they stepped to the plate to provide essential support, perceptions about the purpose and commitment of housing associations improving the lives of residents has changed.

focused on placemaking, others will be specialists in supporting vulnerable residents. Currently, it is conceivable that a social landlord can fulfil its social purpose whilst scoring poor satisfaction scores, purely because of repairs transactions.

This does not invalidate their need to improve the experience of these transactions, but there is a danger that housing associations become too tied to metrics that result in improvements in easily quantifiable parts of service delivery (such as repairs) at the expense of efforts to build thriving communities and happy homes. The current choice of metrics means we are in danger of missing the bigger picture.

We need to develop a new set of metrics that cover the breadth of their potential activities as social housing organisations. And these then need to be available to housing organisations as a menu of options rather than a checklist that they have to complete.

CASE STUDY: Transparency and accountability

The organisations we spoke to included small, place-based ones and national providers. Each had different sets of financial and capacity resources. Everyone we spoke to was working to address the issue of reliability, trust and transparency in different ways.

A place-based housing association with limited staff didn't have the ability to outsource all surveying to an external provider. By embedding a culture of accountability and ownership of mistakes, they worked to ensure feedback continued to function as an objective insight into the quality of services and areas for improvement.

Their small feedback team operates at a slight remove from the rest of the business, empowered to be an advocate for the resident but with a collaborative relationship with the rest of the business. In practice this means working with each department to provide insights from the resident. With the board's backing, the culture around feedback and complaints has moved towards one of continuous improvement.

When it comes to complaints, their mantra is "what was the actual complaint, were we at fault, and did we get things wrong?" These same principles underpin feedback, and have led to a more productive relationship with their residents.

3.5 Stage 5: what are you doing with resident feedback?

With clarity about the why, who, and how of resident feedback, as well as the metrics you're using, the final stage is what you then do with the results. Almost 90% of those taking part in our survey said they actively participated in benchmarking approaches, including Housemark, sector scorecard and UK CSI. However, beyond their use in annual reporting or reporting headline measures back to residents, we heard of little practical use of these satisfaction measures to inform day-to-day operations, apart from their use when bidding for contracts.

When we discussed sector wide benchmarking, we found that many expressed reservations about its value, especially where the context could be so varied, as well as the type of service being provided. For example, drawing a meaningful comparison between the overall satisfaction reported by a large London-based housing association with a smaller, place-based community-led housing association ignores the differences that define each organisation.

When benchmarking was reported as a priority, we heard that the impetus for this tended to come from board level.

CASE STUDY: ESG

Environmental, Social, and Corporate Governance (ESG) criteria have been growing in importance over recent years as investors look to map the impact of investments across a range of key areas from carbon footprints to social impacts. These help inform where and how money is invested and are meant to incentivise more responsible and ethical business decisions.

The wider adoption of ESG in social housing reflects an increased expectation of transparency of the social and environmental impact of organisations in communities as well as set against local, national and global environmental measures. Social housing organisations can, for example, incorporate ESG criteria within procurement decisions, thereby creating wider positive impact.

In November 2020, the ESG Social Housing Working Group published the Sustainability Reporting Standard for Social Housing, covering 48 criteria within ESG from resident voice to placemaking and supply chain management. Many of these criteria are measured using qualitative feedback, which will require an adaptation of existing feedback methodologies.

Operational teams, by contrast, found less value in the benchmarking exercise. Indeed, if abstract benchmarking measures are overly prioritised, this can result in the wrong internal incentive culture with the business geared towards the pursuit of measures that don't reflect the real experience of residents.

For engagement teams with limited resources, preparing benchmarking returns can be time consuming, with less time available for learning. Where satisfaction is the benchmark of success, organisations might solely focus on maximising that metric at the expense of making real and lasting change in communities. It tends to encourage short-term thinking, rather than longer-term, strategic planning.

Instead of focusing on using resident feedback for external audiences, **focus on how you use it to improve your services**. One organisation implemented a culture of transparency and accountability to their residents through a simple complaints process that recognised they were at fault. The aim was to demonstrate that complaints were an opportunity to learn and improve, so they were willing to uphold resident complaints rather than pass culpability elsewhere, creating a greater sense of trust amongst residents.

CASE STUDY: You Said, We Did: getting the comms right
One of the common complaints with feedback (not just in housing) is the lack of trust that anything will be done with the feedback. The first step is to let residents know the results of a feedback exercise. The second is to let them know what you've done about it.

Through quarterly and annual reporting, most organisations said they were sharing some evidence with residents, but most also identified the need to do something more meaningful.

One organisation had developed a communications strategy, through which residents would receive updates on surveys and overall satisfaction, alongside details of actions taken. The challenge was to share this information in a way that empowered residents to take a more active role in their homes and communities. There are ways to empower your feedback team to work for both residents, and the business. Because in reality their interests are aligned.

Another way of achieving this is in **showing residents how their input has led to a change in service delivery – closing the feedback loop**. For many, this only meant sharing overall satisfaction measures with their residents through newsletters, annual reports or on their website.

A more meaningful, granular and individualised feedback would create the sense that feedback was being heard. Several organisations talked about using the *You Said, We Did* approach, whether through personal contact with residents following an individual complaint, or through online summaries of how they had responded to specific issues.

The aim here is to shift the focus of your attention away from benchmarking and onto your residents so that you create a virtuous circle of feedback. You provide a service, they respond, you improve, you tell them how you've improved the service, they respond, and so on.

This, after all, is the primary aim of resident feedback: so it can be put to more meaningful operational use.

It's also what the regulator wants to see: organisations listening to what residents want to tell them, taking away that feedback and taking action. Whilst we can't easily compare like for like across the sector, we can be held to this common standard, and be accountable to our residents and the regulator.

The ability to do this is in our hands. Our research has shown that many organisations are striving to achieve this core purpose of resident feedback.

4   Next steps

To make feedback work for your residents, board, and the regulator, your organisation should be able to answer the five core questions identified in the framework.

Our research showed that there are a range of different approaches to resident feedback in use which have emerged to fit a range of different organisational, contextual and regulatory landscapes.

Nonetheless, it's important to be able to speak to the principles identified in the framework: to be able to ensure your approach to feedback is fit for purpose, speaks to your priorities and leads to action. To ensure you are measuring success by the right metrics.

We've built this framework based on conversations with social housing organisations across the country. Learning from existing good practice is essential, while simultaneously being critical of barriers and gaps in existing models. Many of the organisations we spoke to were happy to be self-critical as to the improvements they could make and were in the process of reviewing and improving feedback.

This paper hones in on some of the key themes those organisations are looking to address, and are a starting point for organisations looking to review and improve their approach to resident feedback.

Aligning purpose

A variety of stakeholders are engaged in the feedback journey. From the resident asked to complete a survey, through contact centre staff, feedback and insight teams, to the executive teams, board and regulator.

One of the key issues is that each stakeholder has a different set of priorities, limitations and strategic objectives.

Understanding the role of others in the feedback journey is important to align these objectives. Operational teams need to be able to support strategy, at the same time as the strategic team recognise the everyday limitations frontline staff face in gathering and actioning feedback.

This framework aims to help organisations build a unified approach to feedback. Internal discussions, as well as dialogue with your residents can help to build a culture of transparency and trust in resident feedback, and empower stakeholders along the journey to deliver on their objectives.

Be self-critical

The questions identified in the feedback framework are a starting point for organisations looking to align their feedback methodology with their core purpose.

Several of the organisations we spoke to were in the process, or had recently been

through a review of their feedback approach. We've seen real value in this exercise. It's a chance to re-align the operational side of the business with the strategic, and ensure feedback is providing a common thread of insights across the business.

Look at where feedback insights enter the business. How are they formatted and distributed? Which parts of the business use these insights to take action, and why? What prevents some members of the team from taking action, are you gathering insights which can inform decision making?

Identify the blockages; are they operational, related to data or cultural? Use some of the good practice examples in this paper to learn from other organisations about how to address these barriers to action.

The five questions in the framework might seem self-evident. That's why its essential to get them right, and have a clear rationale.

Involve stakeholders and be transparent
The point of the framework is to ensure that the way you collect and use feedback is aligned with the priorities of your residents, your board and the regulator.

Bring them along in the journey. We heard excellent examples of organisations bringing resident voices into the heart of the design of their feedback methodology.

When making decisions about your approach to feedback, you should be prepared to share that rationale with those key stakeholders.

Get the data right
Even with the best will and intention, your insights are only as reliable as the data you gather. Some of the biggest barriers to making more use of feedback are rooted in the data.

Build an integrated approach to data that creates efficiencies, saves time for your feedback team to speak to residents, and insight teams to analyse and take action. Leverage the potential of tools and platforms that decrease the leg work, whilst increasing the analysis.

Getting the data right is also vital in enabling you to be transparent to your residents and the regulator.

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