

## Homes in Sedgemoor

### Scrutiny Session:

### Customer involvement within the procurement process Report December 2022



## Background

Fourteen Homes in Sedgemoor (HiS) customers met in person to review customer involvement within the procurement process. The session was led by Sarah Mees, Housing Team Leader who provided an overview of scrutiny and the current customer involvement opportunities within procurement.

Jo Hutchins, Procurement Manager provided an in-depth session and presentation around procurement. This session was an introduction to procurement, the purchase of all goods and services, which explained the process and legislation behind it and highlighted the ways customers can be involved, why it is important that customers are involved and the impact it has.

Naomi Macey, Director of Asset Management & Safety, Claire Tough, Director of Communities & Customer Service and Rachel Palmer, Customer Focus Manager were present to support with knowledge and examples around recent procurement activities.

Customers were also supported throughout the day by Sharon Collard, Community Enabler and Kaylun Henson, Community Enabler & Neighbourhood Assistant.

It was a very productive day with excellent engagement, and we would like to thank everyone for their involvement.

## Methodology

The scrutiny review was carried out over a full day with 13 HiS customers and 1 non-HiS customer. This is the first occasion where we have invited a non-HiS customer to provide a wider perspective. This customer lives in a highly populated area and works closely with our customers.

- The procurement presentation presented by Jo Hutchins included:
  - Public Procurement Regulations and main requirements; transparency, fairness, and best value/quality & service
  - How customers can be involved in the process
  - Why customers should be involved
  - What experience/skills are required
  - Information around the tender process
  - What support & training for involved customers is available
  - When the result is not what was wanted
- An overview of the current involvement opportunities available to HiS customers and the types and values of contracts procured.

- Review of a case study with three different experiences of when a tenant has been involved in the procurement process. These experiences ranged from a very good to very poor experience. This opened a discussion from the attendees on their thoughts and own personal experiences.
- Sarah Mees highlighted the importance of customer voice and influence and provided information around the findings from the “Involving Residents in Procurement” report written by Fusion21 and Tpas.
- What does good look like to you? - The attendees moved into smaller groups to discuss and note down all the things that support good tenant involvement practice. The current involvement opportunities were tested against the following themes linked to procurement:
  - Different stages or opportunities for involvement
  - Admin and preparation around involvement
  - Communication
  - Training
  - Feedback
- Sarah Mees presented the group with a good practice example from Stockport Homes. This gave useful insight to what things help good tenant involvement.
- Jo Hutchins led a group exercise looking at redacted tenders to highlight the sorts of things that would be considered in a tender and how the customer, being the receiver of the service, can help to ensure the finer customer service and customer experience details are not missed.

## Summary of Findings

The main themes noted through the sessions were:

- Starting involvement earlier in the procurement process and consider continuing through the mobilisation stage of a contract.
- Accessibility - Increasing the variety of involvement opportunities including online daytime and evenings and in person sessions.
- Providing more information and training on what is involved.
- Keeping the process and information provided simple.
- Providing feedback to involved customers including the impact of their involvement.
- Making the opportunities attractive to people of all ages and backgrounds.

- Time requirements to complete the procurement exercise

## Recommendations

<b>Recommendation</b>	<b>Comments</b>	<b>HiS Response</b>
1. Ensure a variety of involvement opportunities to ensure diversity, accessibility and to maximise engagement.	<p>Involvement opportunities should include:</p> <ul style="list-style-type: none"> <li>• In-person at convenient times and locations</li> <li>• Online</li> <li>• Surveys</li> <li>• Paper based</li> </ul> <p>All ages should feel welcome. Find out tenants' interests and tap into existing skills</p>	<p>AGREED by 31<sup>st</sup> March 2023 – We will create a forward plan of upcoming procurements for the year and list the opportunities for customers to be involved.</p> <p>We will survey our current involved and potential involved customers regarding their interests and existing skills.</p>
2. Improve the language used.	Use plain English and avoid technical jargon.	AGREED by 31 <sup>st</sup> March 2023 – We will use plain English throughout our publications and documents.
3. Ensure staff/tenant ratio is balanced.	Tenants do not want to feel intimidated by numbers of staff present.	AGREED by 31 <sup>st</sup> March 2023- Create a SOP (Standard Operating Procedure) for procurement involvement which includes evaluation for staff/tenant ratio per specific event.
4. Advertise opportunities well.	<ul style="list-style-type: none"> <li>• Update noticeboards</li> <li>• Advertise well in advance</li> </ul>	AGREED by 31 <sup>st</sup> March 2023 – Communication

	<ul style="list-style-type: none"> <li>• Provide good communication throughout the process</li> </ul>	plan to be built into the SOP.
5. Tenants being involved from the very start of the Procurement process.	<ul style="list-style-type: none"> <li>• Tenants to be involved at pre-tender stage</li> <li>• Tenant satisfaction/complaints and insight data to be used to inform the process</li> <li>• Tenants reviewing the satisfaction scores</li> <li>• Tenants involved in the service standards to be delivered</li> </ul>	AGREED by 31 <sup>st</sup> March 2023 – Will be included in the SOP.
6. Tenants being involved during mobilisation	<ul style="list-style-type: none"> <li>• Consider continuing tenant involvement through the mobilisation stage of a contract.</li> </ul>	AGREED - Regular updates/feedback will be provided. Consider involvement opportunities where possible.
7. Improved preparation	<ul style="list-style-type: none"> <li>• Information provided about the specific procurement; what the service will deliver</li> <li>• Clear selection of opportunities for taking part in the specific procurement</li> </ul>	AGREED by 31 <sup>st</sup> March 2023 – Will be included in the SOP.
8. Training for tenants	<ul style="list-style-type: none"> <li>• Training beforehand on procurement</li> <li>• Mock training exercises of reviewing tenders</li> <li>• Mock training exercises on scoring tender bids</li> <li>• Support and additional training throughout the process</li> </ul>	AGREED by 31 <sup>st</sup> May 2023 - Training re procurement with Jo Hutchins Consider appropriate practical training <ul style="list-style-type: none"> <li>• Overview</li> <li>• What's actually involved</li> </ul>

		<ul style="list-style-type: none"> <li>• How to read tenders</li> <li>• How to score tenders</li> <li>• Confidence building with their conclusion and what they can and can't say</li> <li>• We support their decisions</li> </ul> <p>Will include in SOP.</p>
9. Annual procurement plan	<ul style="list-style-type: none"> <li>• List upcoming procurements for the year ahead so tenants can choose what to be involved with</li> <li>• Bespoke training or insight sessions for involved tenants on specific business areas being procured for to be held in advance of procurements</li> </ul>	<p>AGREED by 31<sup>st</sup> March 2023 – An annual procurement plan will be created and made available to involved customers.</p>
10. Providing feedback	<ul style="list-style-type: none"> <li>• Provide feedback to involved tenants and all customers on the impact their recommendations have had</li> <li>• Summarise the changes that have been made as a result of tenant involvement in the procurement process</li> </ul>	<p>AGREED – Will include in SOP.</p> <p>Produce feedback report from procurement exercises.</p>

### Appendix

Customer notes and comments from the group sessions:

- Good preparation beforehand with information on works and the type of procurement

- Training for customers to understand the process of procurement
- Good communication using different types including phone, e-mail etc
- Explain level of involvement
- Timings and locations of meetings and use online as outreach
- Keep technical jargon to a minimum
- Simplify process for more customers to be involved
- Annual procurement plan
- Use only information that is necessary – not too much legal documentation
- Finding out customers interests and tap into existing skills
- Paperwork sent well in advance
- Maximum tenant involvement numbers
- Feedback of result to understand tenant impact
- Incentives for tenant involvement:
  - Convenient times and places
  - Welcoming and respectful
  - Language – avoid technical jargon
- Tenants not to feel intimidated by staff and numbers
- Emphasise/advertise for all ages – social media profile
- Updated noticeboards with engagement incentives
- Being included in the satisfaction scores
- Being involved at tender stage
- Being made to feel like it's ok for everyone to be involved (any age) and opinions valued
- Social media links that take you to the right pages