

# Indicators to Insight: How to get the most out of your Charter Indicator Survey

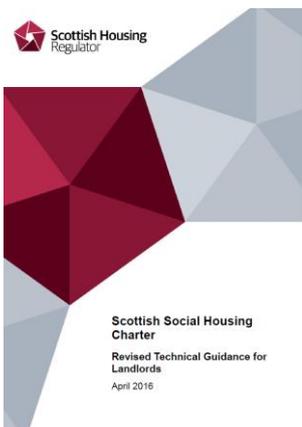
## Charter indicators – chore or opportunity?

BMG Research has an extensive track record of delivering high quality tenant research to social landlords in Scotland. Our experience of such surveys, and of surveys for housing providers elsewhere the UK, means that we are well placed to advise on how to maximise the value your next Charter Indicator Survey delivers. Although these surveys are statutory, we feel that a survey consisting of just the core indicator questions required by the Scottish Housing Regulator is a wasted engagement opportunity, particularly when budgets are tight and when residents' willingness to participate in research is finite.

Importantly, a basic core indicator-only survey will also be limited in its explanatory power. If indicator scores are disappointing, this kind of survey will not be much help in identifying how tenant perceptions might be improved.

This document provides a summary of how we feel Charter Surveys can be positioned alongside wider engagement efforts and how their content can be enhanced to maximise the value they offer to Scottish landlords.

## Compliance with guidance is a minimum requirement



At BMG we are fully aware of the Regulator's requirements for gathering information on the required indicators. New guidance on the Scottish Housing Charter was published in [April 2016](#).

While this has not affected the survey related indicators, feedback on the guidelines for running the required satisfaction surveys has recently been sought. Using any updates to the guidance we will ensure you are asking the right Charter Indicator questions to the right people in the right way, giving you the time to consider what else you want to get out of your survey.

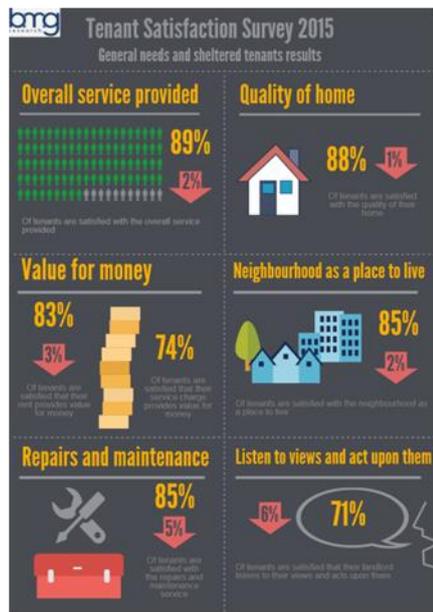
## Make your survey a communications tool with your tenants

Your Charter Indicator survey should be more than a box ticking exercise. Used properly, it can be used as a tool to boost resident involvement and prove that you are really listening. For example:

- The survey can give tenants the opportunity to give their opinions in their own words, as well as answering closed questions. In an indicator led survey there is a risk that residents don't feel that they have been sufficiently consulted on the issues that matter to them. We frequently include open-ended questions within our surveys, offering tenants the opportunity to give the comments they would like to make;
- Tenants can be offered the chance to be contacted about their responses to particular questions. For example, in a recent Tenant Satisfaction Survey BMG conducted for a Scottish housing association, tenants expressing an interest in participating in decision making were asked if they would like to be called about this. Follow up activity by the

landlord in question has boosted tenant participation levels, and in the latest survey, satisfaction with opportunities to participate in decision making processes has increased by 6-percentage points - a sign that tenants are noticing the difference;

- BMG present our survey findings in a highly visual way using infographics. The feedback we have received on these infographics is that they are very well received by tenants. Using such presentation techniques alongside clear messages about what will be done differently as a result of survey feedback, helps to generate a virtuous circle whereby tenants realise that their feedback makes a difference to the service they receive.



## Adding value to the core indicator questions

Below are just a few of the ways that value and insight can be maximised from an indicator survey, and how BMG can help you do this.<sup>1</sup>



### Indicator 1: Satisfaction with the overall service provided

#### Link overall satisfaction levels with other service measures

We will always analyse overall satisfaction levels in the context of how tenants rate other aspects of service delivery elsewhere in the survey. For example, our in-house statisticians frequently run 'key driver' analysis. This enables us to tell which aspects of the service that landlords provide are most associated with high satisfaction overall. This technique also quantifies the potential impact of each driver, providing clear messages to decision makers regarding where investment will produce the maximum impact. By linking the importance of each service with how satisfied tenants currently are with each service, we can establish which areas you need to focus on improving, in order to drive up overall satisfaction levels.

<sup>1</sup> For the sake of brevity we have not covered Indicators 28, 33, and 37 here (quality of temporary/emergency accommodation; factoring service; gypsy/traveller sites), but are happy to advise on these indicators if they apply to your organisation.

## Make the most of what you already know

Information that you already hold on your residents can help us to pinpoint areas or groups where your service levels require improvement. We can split responses by management area/patch/etc - we do this to pinpoint areas where there are pockets of dissatisfaction. Simply through using the postcode information you provide us, we can also group your tenants into different segments using the Scottish Index of Multiple Deprivation (SIMD). This will enable you to assess the needs and perceptions of your tenants in the most deprived areas within your stock. Similarly, the information you hold on property type (flat, house, etc) can enable us to determine which parts of your stock are most satisfied and most dissatisfied.



### Indicator 3: Rating the landlord as good at keeping residents informed

Many of the techniques outlined for Indicator 1 above are also applicable for this indicator, and the other indicators discussed below. However, it's also important here to find out whether your communications take into account tenants' communication preferences. With this in mind we frequently include questions asking tenants how they prefer their landlord to keep them informed of services and decisions - telephone call, email, etc; whether they are online; and if so through what means (smartphone, PC, tablet etc). We can also use the survey to help you update contact details, in particular email addresses, for tenants who agree to pass this information back.



### Indicator 6: Satisfaction with opportunities to participate in decision making processes

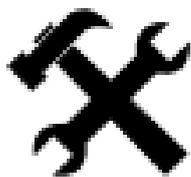
Valuable context here is how *interested* tenants are in such opportunities. Typically, a high number respond 'neither satisfied nor dissatisfied' at this question. We believe that many such responses are from residents who are not interested in such opportunities or who aren't sure what opportunities exist. In a recent piece of Charter Indicator research we supplemented the Indicator question with a second question asking "In general, how interested are you in opportunities to participate in [landlord's] decision making processes?" By asking this, we were able to establish that even though overall satisfaction with participation opportunities was low, satisfaction amongst those interested in such opportunities was much higher. In such cases, we would recommend that more effort goes into making residents aware of the opportunities that are already available, rather than overhauling tenant participation altogether.



### Indicators 9 & 10: Satisfaction with the standard of home when moving in/Satisfaction with the quality of home

Again, it's important to use the information you already hold to analyse responses by key variables such as property type, area, etc; or even, for respondents agreeing to be identified, individual property. We have also asked which aspects of their home (if any) tenants most consider need improvement. By focussing on the responses of those not satisfied with the quality of their home, we can pinpoint whether the work required to improve quality of home perceptions is major (in terms of new bathrooms, kitchens, etc), or whether perceptions can be improved by relatively small scale work. We can also assess

whether space is an issue by asking whether individuals feel their property has too few (or even too many) bedrooms.



### **Indicator 16: Satisfaction with repairs and maintenance service amongst those having a repair/maintenance carried out in the last 12 months**

For this indicator question, a series of follow-up questions can be asked to probe residents' experience of specific aspects of the service they received, from arranging the call through to whether contractors arrived at the right time and did work of a high quality. This will enable you to pinpoint areas for improvement either in terms of service delivery or communication/managing customer expectations. For instance, we typically find that satisfaction with the process of arranging the repair, including the time between reporting the repair and an appointment date, attracts lower levels of satisfaction than the service from the repairs contractors.



### **Indicator 17: Satisfaction with the management of the neighbourhood**

Again, the area information you hold is important in helping us to identify where satisfaction with the management of the neighbourhood is lowest. We can also probe the reasons for dissatisfaction by using other questions such as your handling of ASB complaints and the seriousness of neighbourhood problems such as litter and crime.



### **Indicator 29: Rating rent as good value for money**

We typically see higher levels of satisfaction on this measure amongst tenants who receive housing benefit, i.e. who do not directly pay some or all of their rent. With the transition to Universal Credit we believe that landlords will see satisfaction with this aspect of their service fall. We can use key driver analysis to determine which aspects of the service you deliver are most important in driving value perceptions. Similarly, communications around rent are important: if you have recently implemented rent increases we can ask questions around whether the reasons for the increase were adequately communicated. We also find that tenants do not always realise the full range of services provided in exchange for their rent: by asking whether they are aware of services such as financial and benefits advice, energy saving advice, etc we can gauge whether you should aim to raise awareness of such services.

## General guidance - what works and what doesn't

You need to make your ARC survey as **concise and engaging** as possible - the Scottish Housing Regulator recommends a *maximum* questionnaire length of 4 pages/8 sides for a postal survey, or an average survey length of 10 minutes for a telephone interview/20 minutes for a face to face interview. This encourages more residents to participate, and keeps them engaged when completing the survey. To do this it is important to:

- Avoid long series of consecutive questions that use the same answer scale (e.g. very satisfied through to very dissatisfied). Respondents will tend to think less about their answers towards the end of such a series of questions;
- Ensure that the survey is phrased in a way that makes sense to all your residents. For instance, asking for perceptions of corporate goals that residents see as vague, or not directly relevant to them will lead to a high number of 'don't know' responses;
- Ask about recent experience where possible - e.g. experience of repairs handling in the last 6-12 months, not just perceptions of repairs and maintenance in general. This will ensure that answers better reflect your services as they are delivered currently;
- For service-specific questions, consider how many residents use the service. Where a low number of residents use the service, it may be that a survey targeted at these service users will achieve a higher number of responses than trying to reach them via a general indicator survey.

Boosting **response rates** is also key in delivering results that are truly representative of your tenant population. The regulator recommends a response rate of 40%. Strategies that we have successfully implemented to achieve this include:

- Telephone follow ups to an initial postal survey, calling residents who have not completed the postal survey in order to conduct the survey by telephone.
- A prize draw for those completing the survey;
- Publicising the survey in advance, via communications such as your website, social media, newsletter, etc, as well as ensuring that your staff are all fully aware of the survey.

## Exploring findings in even greater depth

On occasion the survey will raise further issues that you may wish to investigate further outside the framework of a quantitative survey. BMG's qualitative specialists can help in terms of conducting more detailed research amongst small groups of tenants - for example we recently conducted focus groups amongst younger tenants of a Scottish housing association that delivered recommendations on how to communicate better with younger tenants. Similarly, a core part of our work involves transactional surveys amongst those using core services such as responsive repairs, ASB handling, planned maintenance, etc. These surveys capture experiences of the customer journey for each service much close to the point of service delivery. We use these surveys to deliver weekly, monthly, or quarterly feedback on service areas that our clients have identified as important to their overall service.

If you would like to discuss any of these issues further, please contact:

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