

Customer Engagement Policy

Version: 1.7

Date created: July 2023

Date of review: July 2029

Author(s): Community Creator

1. Our policy statement

- 1.1. Customer engagement plays a key role in shaping the way Sage Homes develops its communities and delivers its services. We want our neighbourhoods to be well looked after, safe, secure and attractive environments with vibrant, diverse and stable communities.
- 1.2. Sage aims to ensure services are high quality, represent value for money and are delivered in a friendly, efficient and helpful way that addresses customer needs. We will maintain an open dialogue with customers so they can influence and scrutinise how landlord services are delivered and hold us to account.
- 1.3. Our Customer and Community Engagement Strategy sets out our vision for co-creation and co-design and how we connect with customers through clear objectives and a delivery plan.

2. Purpose and scope

- 2.1. This policy sets out how Sage Homes ensures customers have a meaningful and influential voice in shaping services, scrutinising performance and holding Sage to account.
- 2.2. This policy applies to all Sage customers and to all colleagues, contractors and partners delivering services on our behalf.
- 2.3. It covers engagement, involvement and scrutiny across landlord services, communications and community facing activity, including service design, review and improvement.

3. Our commitment to customers

- Treat customers with fairness, respect and professionalism.
- Provide clear, accessible and timely information about services, decisions, performance and what customers can expect from us.
- Offer a wide range of meaningful opportunities for customers to influence and scrutinise strategies, policies and services.
- Use customer feedback, insight, complaints and scrutiny to inform service design, improvement and strategic decision making.
- Close the feedback loop by showing what has changed as a result of customer input e.g. 'You said, we did'.
- Meet the requirements of the Regulator of Social Housing's consumer standards, including the Transparency, Influence and Accountability Standard.

4. Principles guiding engagement

- **Inclusive** – Engagement is accessible to all, with reasonable adjustments and targeted support where needed.
- **Transparent** – Customers can see how decisions are made and how their input is used.
- **Proportionate** – Engagement is tailored to the scale, impact and risk of the issue.

- **Responsive** – We will listen to and consider all feedback and we will act on it where appropriate. Where we cannot take something forward, we will explain why.
- **Collaborative** – Customers are partners in shaping services.

5. Engagement opportunities and channels

- 5.1. We will be guided by customers in deciding how they wish to be involved and will capture and understand their views through a range of channels suited to individual needs.
 - 5.2. Digital services are delivered through the customer portal and website while ensuring there are accessible, non-digital options are available for customers who need them.
- Customer Scrutiny Panel (CSP) and Specialist Scrutiny Groups e.g. Homes (Asset Management) and Diverse Needs.
 - Focus/steering groups and thematic customer insight groups.
 - Digital Experience and inclusion through Tech Talks.
 - Surveys and feedback tools (transaction, perception and topic specific surveys; polls and digital feedback forms).
 - Local conversations, neighbourhood/site walkabouts and doorstep feedback
 - Community groups, events and community drop ins (including online/hybrid options where appropriate).
 - Service specific co-design sessions and workshops (early stage engagement on policies, processes and communications).
 - Compliments, complaints and service feedback routes (including learning and service improvement actions).

6. Customer feedback, actions and governance

- 6.1. Sage will ensure that feedback gathered through customer engagement and involvement is translated into clear actions, with accountability for delivery and oversight through established governance arrangements.
- 6.2. Actions arising from customer feedback, scrutiny activity and consultation will be recorded, tracked and reviewed through agreed action logs and reporting mechanisms. Progress, outcomes and impact will be reported internally through the Customer Scrutiny Panel, Customer and Assets Committee and Sage Homes Board and externally to customers through newsletters, digital communications and the Annual Customer Report.
- 6.3. We will provide regular updates to customers on how their feedback has influenced decisions and service improvements, including 'You said, we did' reporting to support transparency and continuous improvement.

7. Roles and responsibilities

- **Sage Homes Board:** Provides overall assurance that engagement is effective, learning is acted upon and customers can hold Sage to account.
- **Customer and Assets Committee:** Provides governance oversight of customer engagement, scrutiny and performance information; receives updates and assurance

from CSP and management.

- **Sage Homes senior officers:** Owns the customer engagement framework, ensures resources and capacity and acts on insights and scrutiny findings. Manages customer involvement routes (including CSP), maintains action logs, supports co-design/scrutiny activity and reports outcomes.
- **Customer scrutiny (CSP and Specialist Scrutiny Groups):** Provide customer-led scrutiny of services and performance, making recommendations for improvement and supporting customers to hold Sage to account.
- **Customer Services and service teams:** Deliver day-to-day engagement, gather feedback, respond to customers and implement improvements.
- **All colleagues, contractors and partners:** Engage respectfully with customers, capture feedback appropriately and follow this policy when delivering services.

8. Diverse needs, accessibility and reasonable adjustments

- 8.1. Sage is committed to making sure services and engagement opportunities are accessible to all customers. We will take action to understand and respond to diverse needs, including needs arising from protected characteristics, language barriers and additional support needs.
- 8.2. Customers can request support via any channel. On request, we will provide information in alternative formats (for example, large print or braille) and can arrange translation or interpreting support. Customers can also be supported by a representative or advocate in interactions about landlord services.
- 8.3. Where we provide online services, we will publicise how to access support to use those services and provide non-digital routes where needed.

9. Complaints, compliments and service feedback

- 9.1. Complaints are a key route for customers to raise concerns and help us learn and improve. We will ensure our complaints approach is simple, accessible and publicised and that complaints are handled fairly, effectively and promptly.
- 9.2. We will provide customers with clear information about how to complain, what to expect from the complaints process and what to do if they remain dissatisfied after our response (including routes for escalation).
- 9.3. Customers can raise compliments and service feedback via any channel, including digital routes, telephone, in writing and in person and we will record and use this insight to support learning and service improvements.

10. Performance information and scrutiny

- 10.1. We will collect and publish performance information to support effective scrutiny by customers. This includes tenant satisfaction measures, survey results and other performance data relevant to landlord services.
- 10.2. We will make performance information timely, clear and easy to access and will explain what we are doing to improve where performance is below expectations.

11. Consultation on significant change

- 11.1. Where Sage is considering a change that materially affects customers (for example, a change in landlord for one or more customers or a significant change in management arrangements), we will consult affected customers at a formative stage. Consultation will be fair and accessible, allow adequate time for customers to respond, set out advantages and disadvantages (including costs) and show how views have been taken into account.

12. Data protection and confidentiality

- 12.1. We will handle customer data used for engagement and insight in line with Sage Homes' privacy notice and applicable data protection requirements. We will only use data for legitimate purposes, keep it secure and minimise unnecessary collection.

13. Equality and diversity

- 13.1. Sage is committed to making sure all services are accessible to all our customers. Our staff are trained to make sure they are communicating appropriately with our customers and they have the skills and knowledge to provide relevant information.
- 13.2. This policy will be applied in a way that makes sure we treat all customers with fairness and respect. We recognise our duty to advance equality of opportunity and prevent discrimination or victimisation on the grounds of age, sex, sexual orientation, disability, race, religion or belief, gender re-assignment, pregnancy and maternity, marriage and civil partnership and any other protected characteristic defined within the Equality Act 2010.
- 13.3. On request we will endeavour to provide translations of our documents, policies and procedures in various languages and formats including braille and large print wherever possible.
- 13.4. Sage Homes is committed to providing fair, accessible services for neurodivergent customers and customers with mental health conditions. We make reasonable adjustments based on individual needs, including preferred communication methods, clear information, and flexible engagement options. We encourage early disclosure and work collaboratively with individuals and relevant professionals to agree suitable adjustments. Our aim is to ensure neurodivergent people and customers with mental health conditions can engage confidently and without disadvantage.

14. Delivery of this policy

- 14.1. This policy should be read alongside:
- Antisocial Behaviour Policy
 - Communal Areas and Balcony Policy
 - Hate Crime and Harassment Policy
 - Domestic Abuse and Violence Against Women and Girls Policy
 - Complaints Policy
 - Customer and Community Engagement Strategy

- Annual Customer Report

15. Policy review

15.1. We will review this policy at least once every 2 years to ensure it remains relevant and accurate unless:

- Legislation/regulation or industry changes require otherwise, making sure that it continues to meet our aims and industry best practice.
- We identify any problems or failures in this policy as a result of customer and stakeholder feedback, complaints or findings from any independent organisations.

15.2. We will use customer feedback, complaints learning, scrutiny findings and independent reviews to identify where improvements to this policy or our engagement approach are needed.

16. Legislation and regulatory alignment

16.1. This policy aligns with:

- Social Housing (Regulation) Act 2023
- Regulator of Social Housing – Transparency, Influence and Accountability Standard (effective 1 April 2024)
- Equality Act 2010.

Version	Date	Amendments	Approved at/by	Checked by	Published by	Date of Review
1.5	July 2023	Strategic review and update to the corporate template		Community Creator		July 2025
1.7	April 2026	Added clear purpose and scope (including contractors/partners); strengthened principles, roles/responsibilities, complaints and performance information for scrutiny; added consultation on significant changes; clarified accessibility and diverse needs expectations.		Community Creator		April 2029
1.7	April 2026	CSP reviewed and signed off		CSP members		April 2029