

The logo features the word "BERNICIA" in a yellow, sans-serif font above the word "effect" in a large, bold, dark purple font. Below "effect" is the tagline "Supporting Opportunity" in a smaller, dark purple font. The text is centered within a series of concentric, overlapping circles in various colors including purple, orange, green, and yellow. The circles are of varying thicknesses and are arranged in a way that they appear to radiate from the center.

**BERNICIA**  
**effect**  
Supporting Opportunity

**Tenant Engagement Framework**  
**2026-2031**

# Contents

- 1 Introduction**
- 2 Where are we now.**
- 3 Where do we want to be**
- 4 How will we get there**
- 5 Implementation roadmap**
- 6. Conclusion**
- 7 Monitoring and review**
- 8 Appendices**
  - a. Relationship Map**



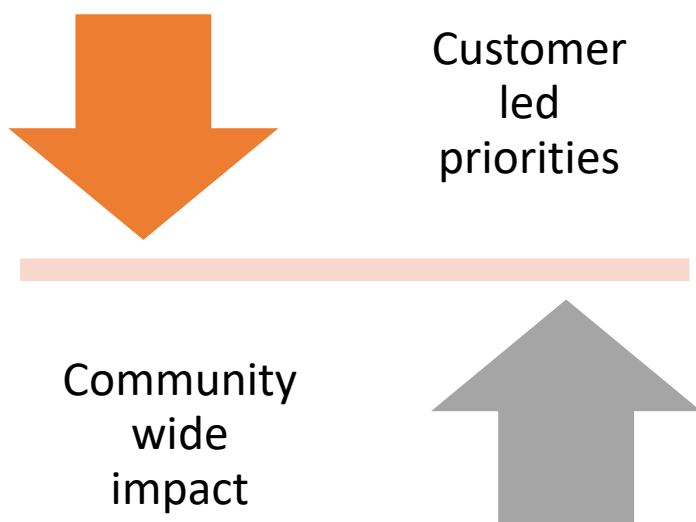


## Introduction

Our new corporate strategy ambitions, recent regulatory developments and TPAS (Tenant Engagement Experts) independent review findings, recognise opportunities to enhance and further strengthen our engagement activities. Meeting evolving expectations and demonstrating genuine tenant influence have driven this fresh approach to Customer Insight and Engagement.

This 2026-2031 framework clearly demonstrates how tenant engagement activities will adapt and expand beyond current methodologies, to continue to provide tenants with increased opportunity and choice to have their say, providing Bernicia with meaningful, collaborative learning opportunities to help shape business decisions.

The framework builds upon the vision of:

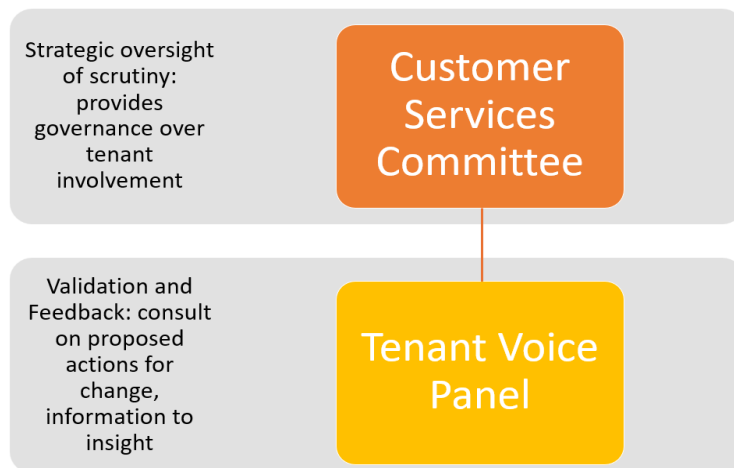


This ensures tenant voices don't just inform our decisions, they drive them.



## Where are we now: our approach

Bernicia has a long and successful track record of empowering and engaging tenants to influence decision making. This is achieved primarily, but not exclusively, through the Customer Services Committee (CSC) and Tenant Voice Panel (TVP).



We are pleased with the success and impact of our existing engagement framework, which helped us achieve top quartile performance in relevant tenant satisfaction measures, and resulted in several areas of good practice being identified by TPAS.

Areas of commendable strengths in our existing framework include.

- Established Tenant Voice Panel with committed members
- Established Customer Services Committee providing governance oversight
- Customer insight processes generating valuable data
- Community investment programme supporting local priorities
- Commitment to listening and learning from tenants
- Strong Tenant Satisfaction Measure (TSM) results



To maintain that level of success, and demonstrate authentic engagement however, we need to continually review and revise our approaches, specifically in response to the following challenges and opportunities:

- Limited diversity in engaged tenant base, with traditional approaches attracting similar demographics
- Scrutiny activities often reactive rather than proactive and evidence-based
- Unclear distinction between governance assurance (CSC) and operational scrutiny (TVP) roles
- Strengthened integration between customer insight data and engagement activities
- The potential and impact of digital engagement
- Shifting local, consultation-based engagement, to be more influence-focused.



# Where do we want to be?

There are three fundamental drivers of change influencing the development of this framework.

## 1. Organisational Ambition:

Our corporate vision of providing value for money homes and services through listening to tenants requires an engagement framework that:

- Provides the Customer Services Committee with robust assurance about tenant involvement
- Enables evidence-based scrutiny of performance and service delivery
- Creates genuine opportunities for tenant influence at strategic and local levels
- Demonstrates clear value for money in engagement investment

## 2. Regulatory Requirements:

The Consumer Standards Code of Practice (April 2024) establishes clear expectations that all registered providers must meet the following:

- **Point 39:** "Registered providers should take reasonable steps to ensure that **all tenants have an equitable opportunity to be involved** in influencing and scrutinising strategies, policies and services, taking into account the **diverse needs** of tenants."
- **Point 42:** "Consultation with tenants must be meaningful, which includes **engaging** with affected tenants **in a range of ways.**"

These requirements reach beyond consultation and require providers to demonstrate genuine influence and scrutiny opportunities accessible to all tenant demographics.

## 3. TPAS Review Recommendations:

We undertake a triennial, independent assessment, of our engagement approach. The most recent review, whilst highlighting several areas of good practice, recommended the following areas for development:

- **Clear roles and responsibilities** for the Tenant Voice Panel with a **more robust approach to scrutiny** - ensuring effectiveness, influence, and challenge across the organisation
- **Digital offer for engagement** to include **diverse range of voices** in service improvement - moving away from one-size-fits-all approaches and traditional channels
- **Proactive local engagement** enabling tenants to review, monitor, and influence local services as part of the broader service improvement framework.



## How will we get there?

### Defining roles; Customer Services Committee and Tenant Voice Panel distinction.

The TPAS findings recommend providing greater clarity between the role of the Customer Services Committee (CSC) and the Tenant Voice Panel (TVP). Therefore, this relationship needs to be addressed as it is the core foundation of scrutiny, and the platform on which we build all tenant engagement.

There is a clear distinction to be made between the roles of the CSC and the TVP:

## Customer Services Committee

Role: Governance and Assurance

Provides governance oversight and assurance to the Board that tenant engagement is effective, compliant, and delivering value

### What it does:

- Receives assurance that tenants have been appropriately involved in service development and review
- Monitors compliance with Consumer Standards and regulatory requirements
- Approves engagement strategy and resource allocation
- Reviews performance of the engagement framework itself
- Responds formally to TVP recommendations within required timescales
- Escalates strategic issues identified through tenant engagement to Board level

### What it does not do:

- Conduct operational scrutiny activities
- Determine what should be scrutinised (this is evidence-led through TVP)
- Replace tenant voice in service improvement decisions



# Tenant Voice Panel

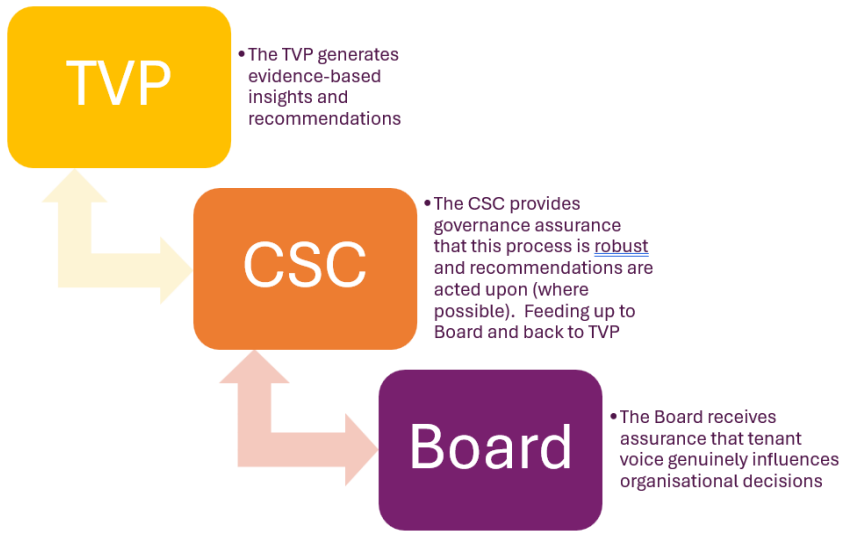
Role: Operational Scrutiny and Evidence

Independently identifies, investigates, and makes evidence-based recommendations for service improvement through robust scrutiny

## What it does:

- Identifies scrutiny priorities based on performance data, customer feedback, and strategic importance
- Provides oversight of all scrutiny activities, whether TVP-led or staff-led
- Makes formal recommendations for service improvement to CSC and Executive Team
- Monitors implementation of agreed recommendations
- Assures quality of scrutiny processes and evidence gathering

This distinction firmly establishes where scrutiny will be conducted. The following relationship embeds this principle:





## **Four Principal Scrutiny Categories.**

Scrutiny will largely fall into one of four categories:

1. Performance (corporate and local)
2. Policy and process
3. Procurement
4. Regulatory

### **Category 1: Performance Scrutiny**

This type of scrutiny will be originated by the TVP through the analysis of data, whether that be operational performance or insight gained through customer voice such as TSMs, complaints or surveys. Performance has been further divided into 'corporate' and 'local' as some issues identified will affect all tenants, and some might only affect a small discreet audience. Some examples might be:

#### **Corporate Performance:**

- Complaints handling effectiveness and learning ('What happened here')
- Repairs service delivery and satisfaction
- Allocations process fairness and efficiency
- Customer satisfaction trends and benchmarking
- Value for money in core services

#### **Local Performance:**

- Estate services quality and responsiveness
- Neighbourhood management effectiveness
- Local service delivery variations eg Northumbria Lodge, heat networks, sheltered schemes, supported living
- Shared ownership
- Community facility management eg Pelaw View community centre

### **Category 2: Policy and Process Scrutiny**

This type of scrutiny will often be generated by Bernicia as we continue to review our policies and processes through a program of continuous improvement. However, they may also be identified by tenants because of performance scrutiny. Examples include:

#### **Service Standards Review:**

- Customer service policies and their implementation
- Service level agreements and performance against them
- Complaint and feedback process



**Process Effectiveness:**

- How well processes serve tenant needs
- Clarity and accessibility of procedures
- Continuous improvement mechanisms
- Communication effectiveness

**Category 3: Procurement Scrutiny**

The Social Housing (Regulation) Act 2023 and its associated Transparency, Influence and Accountability Standard require landlords to provide meaningful opportunities for tenants to influence and scrutinise their landlord's strategies, policies, and services, including procurement processes.

There are several stages of the procurement process where tenants can become involved, which will largely be dictated by the size and nature of the procurement project. This could be at negotiation stage, at supplier presentations or even conducting site visits. Tenants can help to ensure suppliers are:

- Delivering value for money
- Maximising public benefit
- Transparent and accessible
- Acting with integrity
- Providing social value

**Category 4: Regulatory Scrutiny**

Bernicia is accountable to the Regulator of Social Housing and the Housing Ombudsman, therefore, has several legal requirements it needs to meet. To ensure we are meeting those effectively, tenants can hold us to account and ensure we are compliant across each measure. Examples of this are:

- Consumer Standards self-assessment validation
- Tenant Satisfaction Measures (TSM) accuracy and trends, and annual regulatory return.
- Annual Complaints Performance and Service Improvement Report.
- Housing Ombudsman recommendations implementation
- Health and Safety compliance from tenant perspective
- Data protection and information handling.

Commented [AM1]: Should there be mention of Housing Ombudsman there too?



# Implementation Roadmap

To deliver any change effectively takes time, so we have developed a five-year roadmap of activity to help us achieve this. We will, however, reflect on the pace and impact of change throughout our activities, to ensure we continue to meet tenant need and expectation.

## **Year 1 (2026): Foundation Building**

In the first year we will be focused on building upon the foundations of our successful engagement program, to include the following steps:

### **1. Structure and Clarity**

- Re-establish the clear distinction between the role of the CSC and the role of the TVP
- Revise TVP Terms of Reference with clear scrutiny mandate
- Re-establish or re-create CSC and TVP reporting requirements
- Develop a more inclusive approach to TVP meetings trialling different dayparts and channels (daytime/evening, face-to-face/online)
- Recruit additional TVP members if required, focusing on diversity and skills
- Implement revised quarterly performance data provision to TVP
- Review digital engagement options and how they might fit within our program of activity
- Conduct TPAS audit to determine compliance against TPAS accreditation

### **2. Capability Development**

- Deliver comprehensive scrutiny training to TVP members
- Establish evidence-gathering processes and tools
- Create annual workplan methodology based on data analysis
- Implement first formal scrutiny project (TVP-selected)
- Begin local engagement network development in pilot areas (estates services)
- Continue to implement 'lived experience' approach to scrutiny where relevant to do so
- Undertake priority policy reviews using a variety of methods (TVP/Lived Experience)
- Undertake 2 procurement reviews (Responsive Repairs Contractor, TSM Provider)



- Establish approach to complaints scrutiny 'what happened here'
- First annual regulatory compliance scrutiny (Consumer Standards Self Assessment)
- Menu of options for engagement clearly displayed on Bernicia website

**Year 1 Outcomes:**

- Clear role distinction between CSC and TVP operational
- TVP conducting evidence-based workplan development
- First formal scrutiny recommendations delivered to CSC
- Enhanced diversity in tenant representation
- Digital engagement options available and tested
- Gap analysis and plan in place for TPAS accreditation
- Insight into action shared externally via engagement webpage on Bernicia website.

**Year 2 (2027): Embedding Evidence-Based Scrutiny**

The focus for year 2 will be to take the learnings from year one and ramp up activity to cover a wider spectrum of engagement activities across a diverse tenant audience.

**Focus Areas:**

- TVP leading 2 major scrutiny projects across different categories
- Bernicia-led scrutiny with TVP oversight in remaining categories
- Additional local engagement network development (TBC)
- Digital engagement mainstream adoption

**Key Developments:**

- Established rhythm of quarterly TVP meetings with clear agenda structure
- CSC receiving regular assurance reports on engagement effectiveness
- Performance data analysis driving scrutiny priority selection
- Local networks feeding evidence to strategic scrutiny processes
- Measurable service improvements from implemented recommendations – insight into action
- Progress against TPAS gap analysis towards accreditation



### **Year 3 (2028): Optimisation and Integration**

At this point we will be mid-way through our 5 year plan, so it is important that we consult with tenants and colleagues alike and review progress against our aims. This review will cover:

- Comprehensive evaluation of framework effectiveness
- Tenant and staff feedback on engagement experience
- Performance impact assessment of implemented recommendations
- Resource allocation review and optimisation
- Framework adjustments based on learning and experience

At this point we will also be displaying:

- More sophisticated data analysis supporting scrutiny selection
- Multi-channel engagement providing diverse tenant voices
- Local influence demonstrably affecting service delivery
- Strong integration between insight, engagement, and service improvement
- TPAS accreditation achievement

### **Year 4 (2029): Maturity and Excellence**

By year 4 our revised engagement approach will be fully established and embedded, the robustness of which will be demonstrated by:

- TVP operating as a highly effective independent scrutiny body
- CSC receiving robust assurance enabling confident Board reporting
- Service improvements clearly attributable to tenant engagement
- Digital engagement reaching previously unengaged tenant groups
- Local networks integral to service delivery decision-making
- Benchmarking as exemplar of effective tenant engagement
- Best practice sharing with other registered providers
- Innovation in engagement methods and scrutiny approaches
- Strong regulatory compliance with evidence of continuous improvement



### **Year 5 (2031): Continuous Evolution**

The final year of this strategy we will take all the learnings and adapt them to the ever-changing environment, be that regulatory or tenant needs-based influence, to create a forward vision for the future. This will be evidenced by:

- Framework operating seamlessly with continuous refinement
- Next 5-year framework development with comprehensive tenant involvement
- Demonstrated long-term impact on service quality and tenant satisfaction
- Sustainable engagement model with proven value for money
- Organisational culture continues to be genuinely driven by tenant voice



## Conclusion

This framework represents a positive and proactive evolution from consultation-based engagement to a more open, authentic partnership between Bernicia and our tenants.

The five-year journey recognises that meaningful change requires sustained effort, adequate resources, and continuous learning. By starting with clear role definition and capability building, we create the foundation for long-term success in authentic tenant partnership.

By clearly distinguishing governance assurance (CSC) from operational scrutiny (TVP), establishing evidence-based approaches to service improvement, and creating multiple pathways for tenant influence, we will deliver on both our organisational ambitions to tenant voice, and regulatory requirements.



## Monitoring, and review

Success will be measured not just in compliance achievement, but in demonstrable service improvements that matter to tenants' daily lives, delivered through their direct influence and evidence-based scrutiny of our performance.

The success of implementing this framework will be overseen jointly by the Customer Services Committee (CSC) and the Tenant Voice Panel (TVP), in line with their distinct roles. The CSC will provide governance assurance, ensuring the framework delivers value and meets regulatory standards. The TVP will lead operational scrutiny, monitoring how tenant feedback drives service improvements. Together, they will ensure the framework is embedded effectively and continues to reflect tenant priorities.

# Appendices

## Appendix a - Relationship Map

### Tenant Voice Panel, Customer Insight and Engagement Team and Customer Services Committee

