



**Equality, Diversity and Inclusion (EDI) Scrutiny Report and
Recommendations**

December 2024

1. Introduction

- 1.1 Following the launch of Our Sustainable Future in July 2023, and the introduction of the new values and competencies, Salix Homes restructured the organisation to place a greater focus on customers and hearing the customer voice.
- 1.2 Equality, Diversity and Inclusion (EDI), whilst not a service area in itself, rather an overarching principle and commitment that customers should expect to see running through every service area, is a hugely important consideration for Salix Homes and achieving good outcomes remains a priority across all GMHP peers, with the Regulator and Housing Ombudsman.
- 1.3 The topic of EDI for scrutiny in 2024/25 was agreed at the Customer Committee meeting on 5th March 2024 as this area has not been scrutinised previously. In addition, it was considered an important way of assessing progress with the Getting to Know You work and its outcomes around service adjustments.
- 1.4 A group of five scrutineers were selected from Salix Homes' wider scrutiny pool. The purpose of this review was to:
- Understand and scrutinise the accessibility of our services
 - Understand and scrutinise our customer communications in the context of EDI
 - Understand and scrutinise the use of customer data relating to EDI
 - Understand and scrutinise our processes in place when considering and making reasonable adjustments

2. Scrutiny Scope

Subject	Equality, Diversity and Inclusion (EDI) - Customers <ul style="list-style-type: none"> • How accessible are our services to all customers? • Do our customer communications cater for a wide range of diverse customer needs? • How effective is our use of customer data around EDI, including vulnerability data, in service delivery? • How effective are our processes when considering and making reasonable adjustments?
Commissioned by	Customer Committee
Panel	To be sourced from Salix Homes' Scrutiny Pool between 4 and 6 members).
Aims /objectives/outcomes	The purpose of this review is to: <ul style="list-style-type: none"> • Understand and scrutinise the accessibility of our services. • Understand and scrutinise our customer communications in the context of EDI.

	<ul style="list-style-type: none"> Understand and scrutinise the use of customer data relating to EDI. Understand and scrutinise our processes in place when considering and making reasonable adjustments.
Areas out of scope	<ul style="list-style-type: none"> Equality, Diversity and Inclusion among Salix Homes' employees
Key service area involvement	<ul style="list-style-type: none"> Customers and Communities Directorate
Links to corporate plan	<ul style="list-style-type: none"> Ensure a strong and influential customer voice through our new customer engagement arrangements.
Indicators of success	<p>Percentage attendance of the scrutiny panel</p> <ul style="list-style-type: none"> Target: 100% <p>Number of recommendations made</p> <ul style="list-style-type: none"> Target: 8 (approx. 2 per objective) <p>Number of recommendations implemented</p> <ul style="list-style-type: none"> Target: 100% <p>Satisfaction of the process from Scrutiny Panel:</p> <ol style="list-style-type: none"> On a scale of 1-5 how much do you think that Salix Homes has listened to your views? On a scale of 1-5 how much do you think that Salix Homes has acted on your views? On a scale of 0-10 rating, would you recommend being involved with Salix Homes to your neighbours?
Timescale	See proposed key dates below.
Resource commitments	Proposed cost: £1,500, excluding colleague time.

3. Methodology

3.1 The methodology for the scrutiny was agreed with the scrutineers at a meeting on 29th October 2024 and tasks/activities allocated according to preference and scrutineer/colleague availability.

3.2 Agreed tasks were:

- Presentation by Director of People and Inclusion, plus Q&A **Appendix 1**
- Desktop Review of policy documents, including TSM data and ICS accreditation report **Appendix 2**
- Website Review

- My Salix customer portal review
- Customer Survey
- Colleague Survey
- Customer Relationship Management (CRM) shadowing
- Housing Manager interview
- Benchmarking review
- Complaints Data by protected characteristics **Appendix 3**
- Customer Service shadowing

3.3 Colleagues who contributed their time, either by being interviewed/shadowed or by providing evidence were:

- Sarah Henderson, Director of People and Inclusion
- Samantha Foster, Customer Communications Manager
- Pete Modral, Customer Communications Manager
- Laura Flint, Complaints Manager
- Andy Hilton, Customer Service Supervisor
- Kerry Parr, Housing Manager (High Rise and Sheltered)
- Sarah Gibbons, Systems Digital Engagement Manager

4. Findings

4.1 Overview

The scrutiny panel identified that there is a genuine commitment to providing accessible services to all Salix Homes customers that is underpinned by a clear strategic approach, as described by the Director of People and Inclusion and running through several policies and service areas.

This is impacted by a lack of available, reliable customer data that enables Salix Homes to know where to direct its resources and make service adjustments.

Colleagues are well trained and appreciate the need for them to understand who customers are and how their needs might be met but are often prevented from doing this fully or effectively by the lack of information and some simple system design processes that could be improved.

4.2 It was clear to the panel that, for the most part, where gaps have been identified regarding information about customers, there are already plans in place for this to be addressed.

4.3 Presentation

All scrutineers attended the presentation by the Director of People and Inclusion and found it useful context setting for the rest of the scrutiny. The presentation is at **Appendix 1**.

Comments from scrutineers:

“The Equality, Diversity and Inclusion Policy presentation given by the Director of People and Inclusion was very insightful and allowed us to understand how all the policies are interlinked and as such, EDI is embedded in all Salix all key strategic plans and objectives.”

“Further to Sarah’s most enlightening presentation - I’d just like to reconfirm my satisfaction with the fact that:

- Salix *already* has a most robust tradition of EDI awareness running throughout it’s current in-house processes - so much so it could well be considered to be thoroughly ‘*Baked In*’ to the organisations general ethos of operations.
- Though EDI considerations were always acknowledged - I was much relieved by Sarah’s assurance that any/all fulfilment of recruitment within the organisation was (first-and-foremost) awarded only upon merit; and *not*, purely to satisfy what might be the most currently *fashionable* quota system etc.”

“I thought the presentation was very informative and gave a good insight into how things have been done and how you look to be diverse. Sarah covered any questions that I had and I didn’t have anything further.”

“I thought the presentation was good but rather self-congratulatory rather than addressing areas where Salix Homes doesn’t do so well or is doing more.”

4.4 **Desktop Review**

The Desktop Review covered the following:

- Equality, Diversity and Inclusion Policy
- Customer Engagement Strategy
- Customer Feedback and Complaints Policy
- Vulnerable Customer Policy
- TSM Responses 24/25
- Service Mark Assessment Report, September 2024

Policies in this area are thorough and clearly link together in a framework that enables the business to be confident that EDI remains at the heart of decision making and service provision.

A more detailed review of the policy documents is at **Appendix 2**.

Conclusion

The employment of these policies and embedding in strategic plans confirms Salix Homes’ commitment to responding positively to social diversity in the delivery of their services, as a landlord, an employer and partner and confirms their commitment to

tackling inequality, underrepresentation, discrimination and disadvantage. The above policies are interlinked with each other and show the focus on supporting & advising tenants and how these will be achieved. In addition, strategies such as the integration of inclusion in all their policies allows to have an 'inclusive' mind in decision making.

No recommendations relate directly to this area.

4.5 **Website Review**

One scrutineer undertook the website review and their comments have been discussed with the Customer Communications Manager and are at **Appendix 4**.

Conclusion

The website is welcoming, straightforward and accessible to anyone viewing it as an existing or potential customer.

No recommendations relate directly to this area although there are links to the Benchmarking Review at 4.10 and **Recommendations 7 and 8**:

Promote the use of Language Line and other comms methods e.g. SignVideo for customers who require the service & within the business specifically targeted to customers whose first language is not English

Explore options for live chat/virtual assistant

4.6 **My Salix customer portal review**

Initially, two scrutineers undertook a My Salix portal review, attempting to report a repair or instance of ASB, without actually raising a case.

Feedback is at **Appendix 5**.

The two scrutineers then participated in the User Acceptance Testing that was being undertaken at that point, testing the newly accessible online repairs reporting tool.

This part of the scrutiny was somewhat limited as it was very much a 'work in progress' but led to the conclusion below:

Conclusion

The new areas of the portal represent an improvement in reporting repairs in particular, and the pictorial elements should help with diagnosis, particularly for those with limited English or other communication difficulties.

No recommendation relates directly to this area.

4.7 **Customer Survey**

A customer survey was planned, aimed at finding out a wider range of customers' experiences with Salix Homes, in the context of EDI. However, due to time constraints

and the limited availability of reliable data to enable targeting to specific customer groups, this wasn't undertaken.

It was agreed that instead, each scrutineer would submit their own reflections on their experiences with Salix Homes through the lens of EDI, and that at a later date a wider survey would be commissioned aimed at understanding these experiences more fully. Customer Committee is asked to consider recommending this to be undertaken.

The collated personal experiences of the scrutineers is at **Appendix 6**.

No recommendation relates directly to this area.

4.8 **Colleague Survey**

A short colleague survey was also planned, aimed at finding out from a range of customer facing colleagues where they feel Salix Homes does well at understanding and responding to the diverse needs of its customers and where it could improve. However, again, due to time constraints, it wasn't possible to undertake this element of the scrutiny.

It is worth noting that the timeframes for this scrutiny piece were particularly tight and that consideration should be given to extending timeframes in future scrutiny pieces to enable bespoke elements like surveys to be undertaken to strengthen the findings and ensure that they reflect a wide range of views.

No recommendation relates directly to this area, however, in regard to colleagues and how they should be reflective of the customer base in terms of diversity, it did lead to **Recommendation 9**:

Monitor colleague demographics, including at recruitment stage, to ensure that the workforce reflects the demography and diversity of the customer base.

4.9 **CRM Shadowing**

One scrutineer shadowed the Systems Digital Engagement Manager, attending the office to review the CRM system and how it's used to provide the framework for providing and tailoring services to our customers, where required.

The focus of this area was to find out whether the CRM holds up to date information on customer vulnerabilities in the most effective way and to find out about the work underway to improve this information and use it more effectively.

The short report outlining the scrutineer's findings is at **Appendix 7**.

This area became the main area of focus for the scrutineers, also linking into the Housing Manager interview 4.9 and Customer Service Shadowing 4.12.

Conclusion

Customer data is incomplete and not readily available to customer service and other colleague at the time this was reviewed. Some 'Getting To Know You' (GTKY) data is in the system but not all has been uploaded which should be addressed as a matter of priority.

In addition, various improvements could be made to alerts to request the information and to advise customers why Salix Homes requires the information, what they will do with the information and how it will improve the service provided.

This links to **Recommendations 1, 2, 3, 4 and 5:**

Prioritise the configuration of CRM to allow for uploading of the existing captured GTKY data into CRM so the fullest information is available to colleagues.

Upload the existing captured GTKY data into CRM.

Where no contact has been made with Salix after 12 months or personal details/household circumstances including vulnerabilities have not been updated on CRM, introduce a flag to initiate contact.

Create and utilise a flag/pop up for Customer Contact colleagues to identify when no GTKY data has been uploaded and offer to send link to customer for completion/or other preferred method.

Undertake a series of mini comms campaigns to inform/remind customers to provide their EDI information, and how it will assist/benefit with providing a higher standard of service.

4.10 Housing Manager interview

The Housing Manager for High Rise and Sheltered Schemes was interviewed online over Microsoft Teams.

The report outlining questions asked and responses is at **Appendix 8.**

Conclusion

As indicated above at 4.8, and at 4.13 the information available to colleagues to enable them to adjust their communication style, to provide support or to make service adjustments relies on having up to date customer insight.

This links to **Recommendation 7:**

Promote the use of Language Line and other comms methods e.g. Sign Video for customers who require the service & within the business specifically targeted to customers whose first language is not English.

4.11 **Benchmarking Review**

A benchmarking review was undertaken against six other registered providers in the Greater Manchester area for comparison. Registered providers' websites were reviewed for accessibility and contact options and to confirm that EDI-related information is easily available online.

The report outlining these findings is at **Appendix 9**.

Conclusion

As already indicated at 4.4, the Salix Homes website is welcoming, interesting and has numerous accessibility options. The Recite Me software makes navigation significantly easier and provides options for font size, language, read aloud etc.

As a 'window' into Salix Homes and the services it provides, the website is good. An improvement that could be made is for options regarding live chat and/or a virtual assistant function.

This links to **Recommendation 8**:

Explore options for live chat/virtual assistant.

4.12 **Complaints Data by protected characteristics**

This data was reviewed as part of the Desktop Review. The data set and analysis provided by the Complaints Manager indicates that there is no trend towards dissatisfaction with the complaints handling service by any particular group and that Salix Homes' approach to EDI isn't, in itself, something about which complaints are made.

However, this became the topic of discussion amongst the scrutineers regarding more work that could be done across other service areas to understand satisfaction/dissatisfaction with services like repairs, ASB and the sign up process. Are there groups, however small, who don't traditionally complain but might be just as dissatisfied as those who do? Is language or culture a barrier to making complaints, reporting a repair or ASB?

As a result, a request was made for analysis to be undertaken of this satisfaction data, against known demographic data, to start to understand where there might be greater dissatisfaction in certain groups and why this might be. The same analysis was requested against the TSMs, so that this can be mined further for intelligence that will help to target colleague time and resources.

This early analysis has now been provided so whilst it doesn't form a significant part of this scrutiny piece, it is a starting point for internal teams to work with Salix Homes' Business Intelligence team to use data that exists in the business to improve what we know about customers and further shape service provision.

Conclusion

The Complaints data provided for this scrutiny piece was good and indicates satisfaction with the Complaints service is roughly on par with the wider customer base. The business would benefit from carrying out similar analysis across the other service areas that are surveyed and with the TSM data, to understand the 'bigger picture' from an EDI perspective.

This links to **Recommendation 6**:

Continue to fully analyse satisfaction data to ensure parity of service to all customers regardless of demography to identify any increased/decreased satisfaction amongst certain EDI groups.

4.13 Customer Service Shadowing

The Customer Service Supervisor was interviewed and shared his screen to show the scrutineer numerous different CRM views and discuss upcoming process changes that will improve communication with customers and the ways in which service adjustments can be made.

The report outlining these findings is at **Appendix 10**.

Conclusion

As already outlined at 4.8, the system is in place for customer information to be provided and stored. It depends on this information being reliable, up to date and that all colleagues interacting with a customer have appropriate access to it prior to and whilst speaking to a customer.

This data is currently incomplete but the scrutineers were comfortable that once the data is uploaded to CRM and routinely used, updated and refreshed, that this will be a big step forward in understanding customers, beginning to make service adjustments and shape services.

The upcoming customer service training, plus the ongoing training that is provided, will help to ensure that this remains a priority for colleagues.

This links to **Recommendations 1, 2, 4 and 7**:

Prioritise the configuration of CRM to allow for uploading of the existing captured GTKY data into CRM so the fullest information is available to colleagues.

Upload the existing captured GTKY data into CRM.

Create and utilise a flag/pop up for Customer Contact colleagues to identify when no GTKY data has been uploaded and offer to send link to customer for completion/or other preferred method.

Promote the use of Language Line and other comms methods e.g. Sign Video for customers who require the service & within the business specifically targeted to customers whose first language is not English.

5. Recommendations

Recommendation number	Recommendation details
1	Prioritise the configuration of CRM to allow for uploading of the existing captured GTKY data into CRM so the fullest information is available to colleagues
2	Upload the existing captured GTKY data into CRM.
3	Where no contact has been made with Salix after 12 months or personal details/household circumstances including vulnerabilities have not been updated on CRM, introduce a flag to initiate contact.
4	Create and utilise a flag/pop up for Customer Contact colleagues to identify when no GTKY data has been uploaded and offer to send link to customer for completion/or other preferred method.
5	Undertake a series of mini comms campaigns to inform/remind customers to provide their EDI information, and how it will assist/benefit with providing a higher standard of service.
6	Continue to fully analyse satisfaction data to ensure parity of service to all customers regardless of demography to identify any increased/decreased dissatisfaction amongst certain EDI groups.
7	Promote the use of Language Line and other comms methods e.g. SignVideo for customers who require the service & within the business specifically targeted to customers whose first language is not English.
8	Explore options for live chat/virtual assistant.
9	Monitor colleague demographics, including at recruitment stage, to ensure that the workforce reflects the demography and diversity of the customer base.