



Purpose and Structure of the Customer Insight Panel

Vision

We want to place our customers at the heart of everything we do. We believe that through meaningful engagement, listening to our customers and understanding what really matters to them, we will be able to continually improve our products and services for them.

Our customers can help us make local communities as best they can be. We need to understand what this looks like and our customers are in a unique position to help us do this. Every customer has an opinion or view about us and the communities they want to live in. Listening and acting upon these voices will enable Freebridge to provide a reliable, good quality customer experience that meets the diverse needs of our customers. It is through working together with our customers we will co-create better homes, communities and local spaces to be proud of.

The vision for the Customer Insight Panel is to ensure as many voices as possible within Freebridge have been heard, that these voices scrutinise and challenge us and that their views are incorporated into strategic decision making: shaping our strategies, policies and services.

With the Community Voices working alongside them, providing the customer insight, they will be able to make recommendations to the Board. They will be advocates for inclusive engagement and facilitators for change.

Purpose

The Customer Insight Panel will support the Freebridge Community Housing Board by providing customer-based assurance that the Regulator of Social Housing Consumer Standards are being met; value for money is being achieved in service delivery to all Freebridge Customers; and service delivery is in line with Freebridge's vision for Building Better Futures. Through the Customer Insight Panel, members are in a position to influence strategic decisions to make a difference for the diverse group of tenants they represent.

Aims

The Panel will:

- Create and promote effective partnerships between Freebridge Tenants, Leaseholders, the Freebridge Community Housing Leadership Team and Board,
- Represent the interests and views of all tenants and Leaseholders of Freebridge Community Housing
- Take part in developing and influencing Freebridge Community Housing Strategies & Capital Programmes and in the review of finances, policies and practices that determine the provision of housing services
- Act as a consultative body to the Board, providing a residents perspective on all aspects of housing services for tenants and Leaseholders
- Promote awareness of the Customer Insight Panel and its work to all Freebridge tenants and leaseholders

The Panel's Chair will:

- Take responsibility for ensuring that information which provides insight regarding customer satisfaction (TSMs), service quality and performance is reported regularly to the Board.

Activities

Freebridge's Customer Charter provides an excellent starting point for understanding when services to customers are working well, as it is based on extensive consultation with Freebridge Tenants and other key stakeholders as to what is important to them.

Through developing and maintaining a strong meaningful and influential relationship with the Freebridge Board the Customer Insight Panel will ensure that The Charter is used as a vehicle to facilitate and influence change based upon thorough scrutiny and customer insight.

In addition, the Customer Insight Panel will ensure that agreed service delivery standards as set out in the Customer Charter are being achieved for all customers and that Freebridge meets the expectations and outcomes of the:

- The Housing Ombudsman's Complaint Handling Code
- Tenant Satisfaction Measures
- Building Better Futures Strategy

The Customer Insight Panel will do this by:

- Being involved in the decisions about how services are delivered, including the development of Service Standards and new strategies
- Monitoring complaint performance based upon actual Freebridge data and insight
- Ensuring the Customer Influence Policy is inclusive and supported by tenants through evidence that regular engagement is happening across Freebridge's portfolio of homes
- Participating in Freebridge events when required to promote the work the Customer Insight Panel does and to provide the opportunity to hear first-hand from tenants about what is working well for them and where improvements can be made
- Monitoring Key Performance Indicators from Freebridge's Performance Management Framework to provide insight and commentary to the Board.
- Review and comment on other forms of information and insight identified through Customer feedback and Tenant Satisfaction Measure Surveys to obtain a holistic view
- Identifying areas of Customer Satisfaction and escalating areas of Customer Dissatisfaction to the Freebridge Board
- Agreeing and delivering a Scrutiny Programme that is linked to business objectives and customer priorities
- Monitoring the implementation and outcomes of Service and Scrutiny reviews
- Producing an annual review to be reported to the Freebridge Board, to all Freebridge customers and staff detailing the impact of its activities

Complaints Oversight

Accountability and transparency are integral to a positive complaint handling culture. Freebridge will report back on wider learning and improvements from complaints in our annual report and more frequently to customers and colleagues. Our Customer Insight Panel plays an important part in the Freebridge Complaints process as they will:

- Ensure they receive regular updates on the volume, categories and outcomes of complaints, alongside complaint handling performance including compliance with the Ombudsman's orders from the Complaints Manager

- Review arising issues and trends from complaint handling and make recommendations for further Scrutiny to identify the root causes
- Ensure that management responses are tracked and are delivered within the agreed timescales

Reporting & Escalation

When the Customer Insight Panel prepares a report for consideration, the relevant Team members and the Leadership Team shall receive a copy of their findings prior to submission to the Board to provide a response.

The Customer Insight Panel will then prepare its formal report, along with an agreed improvement plan (where applicable) and submit to the Board for review.

Where the Customer Insight Panel findings raise concerns of a serious and material nature, these will be reported directly to the Board by the Chair of the Customer Insight Panel.

Accountability

The Customer Insight Panel meets monthly and will update the Board quarterly on their outcomes and progress incorporating the findings from wider Community Voices. This information will be available to residents through a annual tenant scrutiny report presented to the Board, with a documented Board response, as well as more regular updates being reported on the Digital Engagement Platform, Streets Ahead Magazine and on the website.

A system of regular self-review/assessment of the Panel's effectiveness and impact will be undertaken and shared with Board, the Leadership Team and tenants, to include:

- Annual Impact Assessment
- Annual health checks including training and development assessments

Powers and Access to Information

The Customer Insight Panel will have appropriate authority to execute the requirements of their role, including but not limited to:

- Commissioning additional reviews to inform findings and provide evidence
- Requiring Leadership Team members to attend its meetings to provide information, subject to provision of a minimum of 10 working days' notice.
- The Customer Insight Panel will be enabled to request reports and information from the Leadership Team to carry out its duties, within agreed timescales. The Leadership Team have a duty to provide requested information within 10 working days of receipt of the formal request (subject to conditions set out in Confidentiality and Data Protection section).
- Making a formal request for a response to its recommendations, triggering a duty on the Leadership Team to respond within 28 calendar days by way of an improvement plan including actions to be completed, lead staff member and anticipated timescale for completion
- Signing off the improvement plan as addressing all recommendations or returning it to the Leadership Team for further improvement, within 28 calendar days of receipt.
- Any final and agreed Improvement Plan will be presented to the Freebridge Leadership Team and/or Board and progress monitored by the most appropriate Involvement Group within the Customer Influence Framework.

Confidentially and Data Protection

All information acquired for the purposes of carrying out the Panel's duties is confidential to Freebridge Community Housing.

The Customer Insight Panel must not release information, either during their appointment or following termination (by whatever means), to third parties without the express clearance from the relevant member of the Leadership Team. Customer Insight Panel members are required to sign a confidentiality agreement prior to being given access to confidential information.

Customer Insight Panel members will be bound by the provisions of the UK GDPR and the Data Protection Act 2018. At times access to information may be restricted if it contains personal or personal sensitive data, where the provision of that data to the Customer Insight Panel would breach Data Protection legislation.

Membership and Remuneration

The Customer Insight Panel will consist of:

- at least 4 and up to 8 tenants. A maximum of 2 may be either resident leaseholders¹ or shared owners; and
- 2 Board Members – both of whom must have lived experience of Freebridge's services

The Board shall nominate a Board Member with lived experience as Customer Insight Panel Chair; the Panel shall appoint a Vice Chair at their discretion.

Given its role, importance and profile, The Customer Insight Panel requires high standards. These will be maintained utilising the following:

- A clear role profile and set of standard competencies, along with a selection process which focuses on key skills and commitment.
- Successful applicants, whilst volunteers by nature, will nonetheless be expected to adhere to any Code of Conduct adopted by the Board, a Confidentiality Agreement and make a commitment to undergo training and development (including Equality & Diversity) as part of their role.
- Successful applicants will be selected by a recruitment panel comprising of a member of the Freebridge Leadership Team, the Panel Chair and the Head of Communications and Engagement
- Appointment will be made from those considered to best meet the role profile and person specification following the recruitment and selection process. Those deemed unsuccessful or who do not meet the necessary requirements will be offered training, support and encouragement to build their capacity and confidence to get involved.

Terms of office for these voluntary roles will be up to two years, with a maximum tenure of four years or two terms, as confirmed in a separate Terms Protocol. A preferred composition will be developed, with priority given to achieving a composition that, as far as possible, reflects the customer demographic.

Customer Insight Panel Members are volunteers and are not entitled to any fees or salary for the time they spend in these roles. As gratitude for their invaluable service, they will be given gift vouchers, of such quantum and of such frequency as set out in a separate Remuneration

¹ Freebridge define 'Resident Leaseholders' as Leaseholders who occupy the leasehold property as their main or principal home

Protocol (and which protocol Freebridge can at their absolute discretion amend or withdraw from time to time).

Conflicts of Interest

In accordance with Freebridge policies and procedures, Panel members are expected to declare any conflicts of interest and any interest that may be relevant to the work of Freebridge Community Housing or any item that may be considered by the Panel. If a conflict of interest arises, the member must promptly advise the Chair. Potential conflicts of interest that may arise include Board membership and employment with Freebridge Community Housing. A conflict may also arise if employment is obtained with a major contractor of Freebridge Community Housing. Receipt of a particular service from Freebridge Community Housing does not generally constitute a conflict of interest.

Close relatives will not be permitted to serve together on the Panel. This is because of concerns around independence of judgement, conflicts of interest (actual and perceived) and diversity of representation. Should a situation occur whereby the relationship between two existing Panel Members changes to the extent that it falls within the definition of 'close relatives', one of them would be expected to step down from the Panel. The term "close relatives" refers to spouse, partner, parents, grandparents, children, grandchildren, brothers, sisters, and similar relations by marriage or civil partnership, but not including estranged relatives where there has been no contact for a number of years.

Training and Personal / Group Development

A training programme will be developed and delivered to support the learning and development of the Customer Insight Panel to fulfil its purpose and aims to a high standard. The training programme will be reviewed regularly to make sure it is fit for purpose and may be added to on an ad hoc basis should a specific training need be identified.

All Panel Members undergo an annual appraisal to assess individual performance against the role profile and development needs. Appraisals will be conducted by the Panel Chair, with the Chair's appraisal carried out by the Chair of the Board, and the results will be used to develop individual training and development plans.

All new members will undertake an induction training programme and complete a training and development skills and needs self-assessment.

Frequency of Meetings

Generally, meetings will be held month

Additional activities are expected. These include, but are not limited to:

- Meeting preparation including reading reports/information
- Presenting recommendations to the Board and or the Leadership Team
- Individual research/benchmarking
- Attending Out & Abouts
- Attending events to promote the work of the Customer Insight Panel and to offer Face to Face interaction with the tenants they represent

Support and Resources

Freebridge Community Housing will allocate and make available to the Customer Insight Panel:

- The Communications and Engagement Team will provide administrative support (when required by the Customer Insight Panel)
- Meeting Minutes will be carried out by the Governance Coordinator
- Access to appropriate equipment and meeting room facilities
- A budget for reasonable expenses, training and development, commissioning additional research and independent mentoring support
- Clear routes of access to the business, its team, contractors and Board

Minimum Attendance

The minimum number of attendees required for a meeting to be valid will be four Customer Insight Panel members or half of the total membership, whichever is the lower. In addition, there must always be more panel members present than Board Members

Electronic means of communications will be used to involve Panel members in the business of the Panel, providing that all those participating are able to participate fully and comment on the proceedings. In this instance those members participating through video, conference call or other electronic facilities will contribute to the count in determining whether the meeting is valid.

Expectations of Membership

Customer Insight Panel members agree to:

- Work together as a team
- Understand and respect the views and rights of all members
- Listen to each other
- Allow others to express their views and be sensitive to their needs
- Support each other and treat each other as equals
- Do what they say they will
- Abide by decisions made and adhere to the principles of collective responsibility
- Listen to what tenants want (through performance information and involved tenant groups)
- Share the workload
- Recognise the abilities and shortcomings of others, rather than labelling them
- Not discuss or divulge any sensitive or confidential information that is raised during meetings

Membership may be withdrawn if a panel member:

- Fails to meet the above expectations; or
- Fails to attend 3 consecutive meetings without good reason and prior notice to the Chair (except in the case of sitting out a review); or
- Acts in an aggressive or offensive manner.

The withdrawal decision will be made jointly by The Chair and a member of the Leadership Team, acting at their absolute discretion.

Aggressive or offensive behaviour could include (but is not limited to):

- Interrupting others and disregarding their opportunity to speak
- Dominating conversations thereby excluding or marginalising the contributions of others
- Refusing to listen or engage respectfully with differing viewpoints
- Apportioning blame or making disparaging remarks about colleagues or panel members

- Using discriminatory or offensive language, including but not limited to remarks or behaviour based on race, ethnicity, gender, age, sexual orientation, disability, religion, or any other protected characteristic

Panel members are expected to uphold principles of equality, diversity, and inclusion by fostering a respectful environment where everyone feels valued and able to contribute. Discrimination, harassment, or exclusion of any kind will not be tolerated.

Should it become necessary during the life of The Customer Insight Panel, for Freebridge Community Housing to take action to enforce the terms of tenancy of a Panel Member, they will be required to stand down for any period of that action.

Review

This document will be reviewed at least every two years.

Date of last review: 09/04/2026