

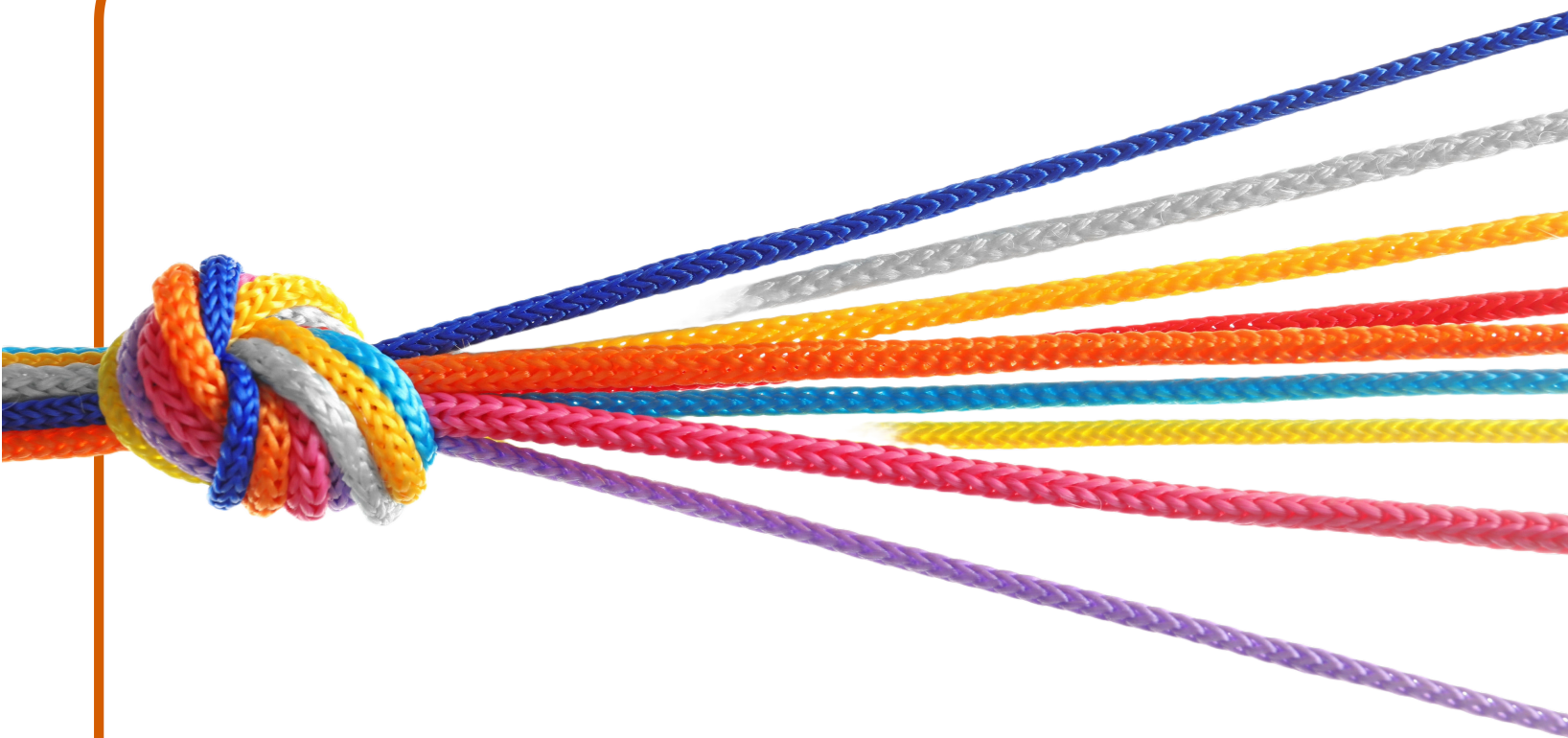


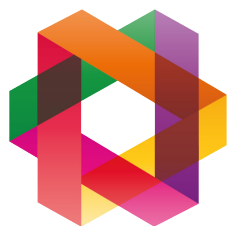
THE ENGAGEMENT EXPERTS
tpas



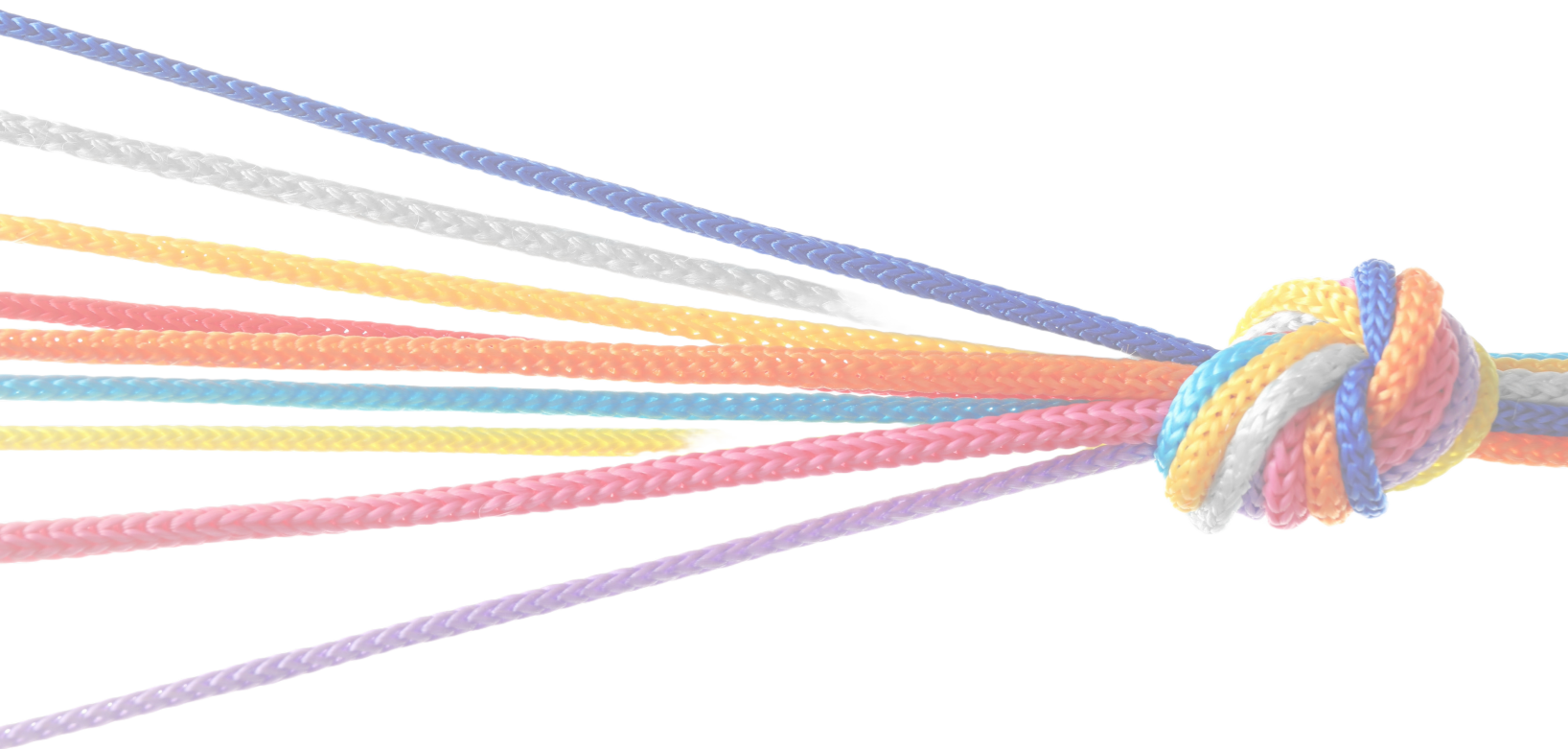
Effective Tenant Engagement

Procurement Toolkit





THE ENGAGEMENT EXPERTS
tpas





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Introduction

The Procurement Act, which came into effect in February 2025, marks a significant shift in how public contracts are awarded and managed. This presents a crucial opportunity for social housing landlords: not just to meet regulatory requirements but to embed procurement practices that genuinely reflect the needs and priorities of the communities they serve.

At Tpas, we have long championed the value of tenant engagement in decision-making. Lived experience is not just a voice at the table, it is the foundation of better, more effective procurement choices. By actively engaging tenants, landlords can ensure that the services and contracts secured genuinely align with tenants' needs, expectations, and lived realities.

However, meaningful engagement requires more than just an invitation to participate. It demands a commitment to training and support, equipping tenants with the knowledge and confidence to contribute effectively.

While the Procurement Act does not explicitly require social housing landlords to engage with tenants or evidence their contribution, wider regulatory expectations and best practice principles emphasise the importance of tenant engagement. Ensuring residents have a voice in procurement decisions, fosters a culture of collaboration, accountability, and better outcomes for all.

This toolkit has been co-created by Tpas and Echelon to support landlords in embedding best practices in tenant engagement within procurement. By combining the expertise of Tpas in tenant engagement with Echelon's deep understanding of procurement, we have developed a practical resource to help landlords ensure that tenants are not only consulted but empowered to shape the decisions that impact their lives.



Julie Butterworth
Head of Commercial Partnerships, Tpas

Foreword

We were delighted to be asked to write this toolkit in collaboration with Tpas.

Echelon has always advocated for meaningful tenant engagement through all stages of the procurement process, from scoping requirements from a tenant's perspective as the end user, to active contribution in the procurement stages, and ongoing scrutiny of the contract(s) procured.

This toolkit draws on our experience, not as only as consultants but also through our team's lived experience working as clients and contractors.

The toolkit emphasises our continual belief that tenant engagement is not an "add on", or "nice to have" but should be the foundation stone of every successful contract procurement.

We would like to thank the many tenants that we have worked with over the last twenty years, who have given us the experience and insight to be able to develop this toolkit and look forward to working with many more of you in the future.



Mathew Baxter
Group CEO, Echelon Group

Why Tenant Engagement Matters

When tenants are actively involved in the procurement of new services, they can ensure that the services provided are more likely to meet their needs and that of the communities they live in.

Better Quality Service

Tenants are the ultimate end users of the services being procured. Their insight and feedback is invaluable as it provides a first-hand account of how the services are being delivered. This includes an understanding of both the quality and suitability of the services.

By actively seeking and incorporating tenant feedback, we can address specific issues and make improvements that directly impact tenants daily lives. This process not only helps in enhancing service delivery but also ensures that the services remain aligned with tenant needs and expectations.

Increased Accountability

Engaging tenants creates transparency and accountability for service providers. Tenant contributions in monitoring and reporting ensures commitments are met and standards upheld, or explanations provided when they aren't.

This ongoing engagement allows tenants to give real-time feedback, identify areas for improvement, and highlight successful services for efficiency and enhancement.

Higher Satisfaction

When tenants feel heard, their satisfaction with services increases. This involvement fosters a deeper connection with service providers. Seeing their feedback acted upon creates a cycle of improvement and mutual respect, leading to higher satisfaction and stronger, more engaged relationships.

The Benefits:

- Better quality service
- Increased accountability
- Higher satisfaction
- Earned trust
- Increased efficiencies

Earned Trust

Building trust between tenants and service providers is essential for successful social housing services. When tenants feel heard and valued, it fosters mutual respect and understanding. This engagement bridges gaps, empowering tenants to ensure services meet their needs and those of their communities.

Tenant contributions in decision-making provides insights into their challenges and preferences, improving service quality and building trust. Seeing their feedback leads to tangible improvements, strengthens the tenants' belief in their landlords and service providers, creating a cohesive and supportive environment.

Potential Efficiencies

Effective tenant engagement highlights urgent issues and prevents unnecessary expenses by streamlining processes and ensuring efficient resource allocation.

Tenants also provide insights into which services are the most valuable to them, helping providers focus on what matters most.

Additionally, utilising data from the Tenant Satisfaction Measures (TSMs), complaints and monthly management reports will also provide effective insights.

How To Engage With Tenants

Engaging tenants effectively requires a broad approach that includes multiple methods and tools to ensure that tenants of all backgrounds and capabilities, with varying degrees of time and capacity have access to be involved. We have listed below some of the ways we believe meaningful engagement can be achieved.

Surveys and Questionnaires
Ad-hoc or Informal Groups
Existing Engagement Groups, Panels or Committees
Digital Platforms
Bespoke Workshops and Training Sessions

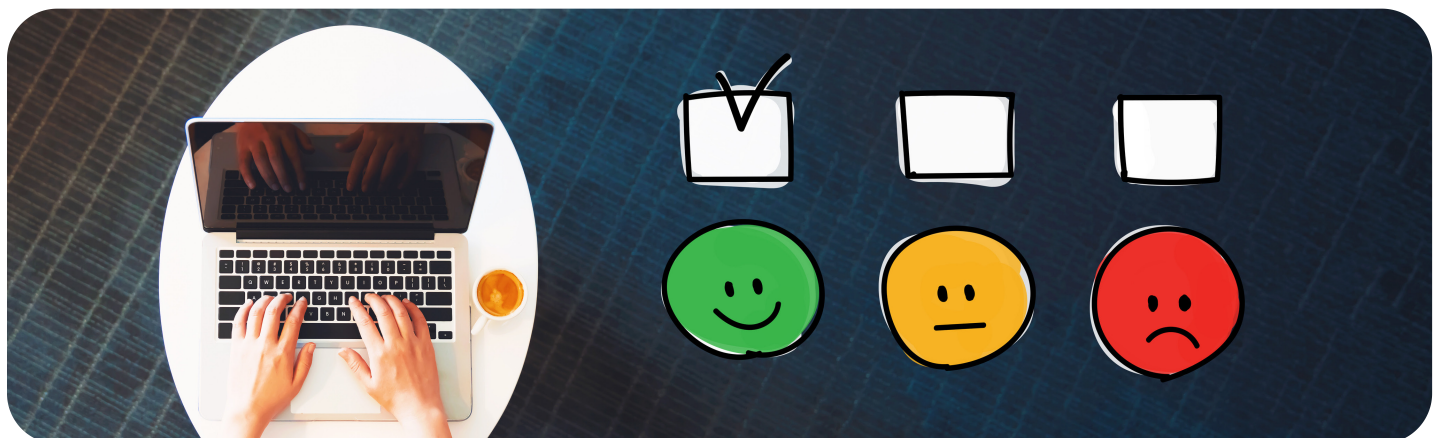
Surveys and Questionnaires

Surveys and questionnaires are commonly used to engage tenants as they don't require immediate responses or attendance, making them suitable for many tenants. They can be easily sent to large groups and adapted with multiple-choice, ranked, or open-ended questions.

Typically sent via email or surveying software like Slido or SurveyMonkey, these tools often yield higher response rates and encourage honest feedback due to anonymity. Responses generated can often be presented quickly using the reporting facilities offered as part of the surveying software. However, electronic surveys may be overlooked or forgotten, and anonymous responses can't be tracked for follow-up. Phone surveys allow for more engagement but are time-consuming and costly, especially with external organisations.

Points to be taken into consideration:

- Making surveys available as 'hard paper copies' posted to tenants as well as being sent electronically.
- Ensuring when shared electronically, that email addresses are hidden or 'bcc' is used to ensure that the requirements of GDPR are met.
- Making surveys available in large print or as an audible link for tenants who may be visually or hearing impaired.
- Keep phone surveys shorter, to ensure only significant information is asked for and tenants remain engaged in the process.



Existing Engagement Groups, Panels or Committees

The use of focus groups for tenant engagement is already widely used. Many landlords already have an established group of engaged tenants, which can provide a quick and efficient way to form a focus group. This can be carried out either as an additional agenda item if meetings/sessions are held regularly or at a specially arranged extra meeting.

We would generally always advocate for face-to-face meetings of focus groups, but it is entirely possible to hold these virtually, via MS Teams, Zoom or other similar platforms. This, of course, does require all members of the group to have access to an appropriate device e.g. computer, tablet or mobile device, and access to internet services. Virtual sessions can also be recorded, so those who are unable to attend can view later at their own convenience.



Points to Remember

- ▶ Make sure that the focus group (if already in place) has the relevant knowledge and context to be able to actively participate in the engagement process.
- ▶ Using an independent facilitator helps encourage openness and ensures that all attendees are included and respected, promoting active participation from everyone.
- ▶ If you intend to hold focus groups face-to-face, consider arranging transport to improve accessibility and/or offering incentives for tenants to attend e.g. vouchers or refreshments.
- ▶ Whether held face to face or virtually, consider holding these at various locations and different times of the day, or even evenings or weekends to ensure that tenants who have work, or other commitments during the day can still participate.
- ▶ Sessions should be a maximum of 1.5-2 hours to keep the conversations focused.
- ▶ Share an agenda in advance and clearly outline what topics are appropriate for discussion. While it's acceptable to talk about services in general, tenants should not raise individual repair issues related to their own properties.

Ad hoc or Informal Groups

As well as structured and organised tenant groups, informal or ad hoc groups are often a good method of effective engagement, examples of these could be a mum & toddler session at a community centre, a drop-in coffee morning in the communal space of a block or estate or a fish & chip evening at a sheltered scheme.

These events tend to encourage engagement with specific or targeted groups due to the way they are advertised and set up, they can be held to supplement other engagement activities and are especially useful if feedback from a particular tenant group is being sought.

You should always ensure that you aim for a cross section of tenants covering different ages, household types, diversities and vulnerabilities, to capture a wide range of views and opinions.

The interactive nature of focus groups tends to allow for more engaging conversations and therefore a deeper understanding of tenant concerns and values than surveys alone. It also begins to build a relationship between tenants and those procuring the services at a very early stage.

Focus groups are generally most effective when they are structured and involve smaller groups of around 6 to 12 attendees. These sessions give tenants a platform to share their experiences and opinions - either in general or around specific themes related to services or procurement.

If you don't already have a focus group in place, there are several ways that these can be set up. Advertise widely using multiple methods like websites, newsletters, text alerts, social media or notices in community centres.

Bespoke Workshops and Training Sessions

Where there are no focus groups already in place, or these are not relevant to the procurement being carried out, bespoke workshops and training sessions can be held to help tenants understand the procurement process, the scope of the proposed contract and how they can contribute effectively to the process.

Attendance would usually be sought from already engaged tenants, or those who may have particularly insightful information into the services being procured.



We recommend that all training sessions are evidenced and a record of attendees and outcomes are recorded.



Echelon has proven that including tenants who have had cause to complain in the procurement process can be very effective. They can provide real-life examples of situations where the service promise and service delivery did not align.

You can also mix tenants who have raised complaints and satisfied tenants together to ensure the procurement process reflects diverse perspectives, helping to avoid complacency and uncover blind spots in future planning.

Digital Platforms

Using Facebook groups or a private forum-based platform can greatly enhance tenant engagement by improving accessibility, visibility, and convenience. These tools help reach a broader and more diverse tenant base, particularly those who may feel uncomfortable speaking up in meetings or focus groups.

Digital platforms are best at supporting and presenting eye-catching visuals and short videos to explain processes or share information in plain language. Subtitles and captions can further improve accessibility, especially for tenants whose first language is not English.







“
Tenants need to be empowered to ask lots of questions to get that clear understanding, otherwise the project is pointless
Involved Tenant - CHS
”

However, it is essential that digital engagement is supported by robust moderation. Comments and questions should be verified, acknowledged, and responded to professionally. Safeguards must also be in place to protect tenant identities and prevent the sharing of sensitive information in public forums.





Ultimately, digital engagement should complement traditional methods. It remains important to offer offline and face-to-face options to ensure inclusive experience.

In addition, organisations should consider co-designing digital engagement strategies with tenants themselves. Collaborating with tenants in shaping how these platforms are used, ensures the tools reflect the real needs and preferences of the community. This collaborative approach can lead to more effective communication, stronger relationships, and better outcomes for both tenants and housing providers.

Community & Forum-Based Platforms

-  Slack
-  Circle Platform
-  Hivebrite
-  Get Involved Network

Survey & Polling Tools (for hybrid use)

-  Slido
-  Mentimeter
-  SurveyMonkey
-  Typeform

Incorporating Tenant Engagement into Procurement

Tenants can and should have an input at all stages of the process, even before any formal procurement activity has taken place. Ensuring the final contract truly meets tenants' needs, improves service delivery, delivers on its promises and builds trust between tenants, their landlord and service providers.

Each of the key stages below are an opportunity to engage with tenants, with a summary of how this can be done.

Options Appraisal

If, as part of the overarching process (before the procurement process proper starts), an options appraisal or service review is being carried out, this should be the first opportunity to seek tenants' views and opinions.

We would suggest a face-to-face 'visions & values' workshop, broken down into three separate themes:

- What is working well in the current service
- What is not working so well
- Aspirations/wish list for the new service

These would be captured and discussed, ensuring each attendee has an opportunity to give their views, and then summarised for the final options appraisal/service review report.

Seeking tenants' views in this way, alongside those of staff and the current service provider(s), can often highlight where expectation and reality differ, indicating where the gaps in service delivery are, and should be referenced diligently when the scope of the new service is being designed.

Scoping

Following on from an options appraisal (if an options appraisal has not been carried out, it is assumed that there will be an initial scoping workshop), the information gathered at these sessions will be used to shape the scope of the new service(s).

Tenants play an important role as the people who use these services every day. This is a chance to create new services that truly meet their needs, focus on tenants, and lead to better satisfaction and outcomes.

Tenants have a lived experience of service delivery and as such understand how these work in practice, not just how they're described on paper.

Their insights help identify gaps, inefficiencies, or unmet needs in the current service and early engagement in this process builds ownership and trust in the process, where they may previously have lost faith or felt let down.

Tenant concern	Influence on procurement/scope
"Repairs are always delayed"	Set stricter response times and KPIs
"We don't get updates"	Incorporate regular communications from service providers into the process
"Jobs take multiple visits"	Prioritise first-time fix performance
"Operatives are rude or untidy"	Include conduct, training, and behaviour standards on an ongoing basis
"I don't know how to report issues"	Communicate and implement a simpler, multi-channel reporting approach

Specification Review

This stage of the process sets out exactly what is expected of the contractor. Involving tenants in writing and reviewing the specifications of the service helps make sure the contract is clear, realistic, and focused on their needs.

Specifications for repairs contracts, in particular, can be lengthy, and 'jargon' heavy, so there are several ways to approach this with tenants:

Start with tenant outcomes and work backwards to define what needs to happen and how contractor performance should be measured.

Map out a 'good service' with tenants, identifying pain points and improvements that can be added to the specification (e.g., step-by-step journey for a repairs service).

Break down specifications into smaller, tenant-focused parts, avoiding unnecessary technical detail. Check if they reflect current services and are easy to understand.

Link specifications to complaints data to identify areas for improvement and update content to address recurring issues.

Use small groups to review specific sections, then bring ideas back to the main group for discussion and agreement.

An example of where Echelon has used tenant engagement in the writing and reviewing of specifications has resulted in appointment slots being redefined to better suit the overall needs of tenants.



Although the previous contractor had underperformed, no alternative bids were received. We re-awarded the contract with significantly enhanced performance measures, directly informed by tenants. The engagement team, alongside involved tenants, applied consistent pressure throughout the procurement process. Their advocacy not only championed the needs of their community but also led to a marked improvement in service delivery.

Staff Member - Live West

Don't forget to record and evidence any training delivered, as well as data garnered from scrutiny panels.

Question Design (All Stages)

Engaging tenants in the development of method statements and quality questions during procurement helps ensure the contract reflects their priorities and expectations. It also supports the selection of a contractor whose values align with those of the tenants.

This collaboration adds authenticity to the process, builds tenant confidence in procurement, and helps contractors better understand what truly matters to tenants. As a result, the quality and relevance of bidders' responses are significantly improved.

Tenants are most commonly involved in shaping questions related to customer experience, communication, vulnerability, complaint handling, and social value. However, their input can also be valuable in other areas such as, operational delivery or health and safety; where they may offer fresh perspectives on what questions should be asked.

Designing questions with tenants works best through a live conversation, either in person or via a virtual session. This interactive approach allows for real-time discussion, clarification, and collaboration. In most cases, we recommend tenants design just one or two questions.



By involving tenants in shaping quality questions/method statements, you can ensure the procurement process goes beyond technical compliance and truly focuses on delivering a service that meets the day-to-day needs of tenants.

It's a practical, meaningful way to embed the tenant voice in the contractor selection process and lay the foundations for a more accountable, tenant-focused contract.

A helpful way to begin is by identifying a current issue or a desired outcome. This can guide the group in shaping questions that are relevant, focused, and impactful. **For example:**

'How will you ensure that tenants are effectively and consistently communicated with when repairs can not be completed at the first appointment? What methods of communication will you use, and at what points during the process will this happen?'

'Where a tenants vulnerability is identified, either prior to the repair being carried out or at the point of the appointment itself, how will you ensure that the service is suitably adapted? Provide examples of what adaptations to services you have made for specific vulnerabilities and how you have ensured this information is fed back appropriately to the client'

Evaluation (All Stages)

Tenant contribution in the evaluation of the contractor's responses/method statements is an effective way to ensure that the potential service aligns with tenants' expectations. This is called the tenant evaluation panel.

The tenant evaluation panel will normally consist of the tenants who have contributed from the start, as they will have a clear understanding of the process and the services being procured. But it is possible to include tenants who have had no previous engagement, as the responses are scored directly in relation to the question being asked.

It is vital that prior to any evaluation process being carried out, full training is provided to all of the involved tenants. It may be helpful to hold any training sessions outside of usual working hours to suit the tenants' availability. Virtual training sessions should be recorded for tenants to review if they need to.

The panel should be clearly informed of the process and the requirements, including being open and clear about how much time will be required to carry out the evaluation properly. You can reassure tenants that if they don't have the time, they can still contribute in other parts of the process. Whether they will be evaluating all responses or just a selection and if their scores will be used as the final scores, or contribute to the overall moderation of that particular question.

Training sessions should cover:

- ✓ **Understanding the question:** Review and break down questions so tenants know what's being asked and what a good answer looks like.
- ✓ **Scoring guidance:** Explain how to apply the scoring criteria, with examples for each score (e.g. 1–5 scale).
- ✓ **Avoiding bias:** Emphasise that scores must be based only on written responses, not personal opinions of contractors.
- ✓ **Justifying scores:** Stress the need for clear notes to support each score - vague comments like “good answer” aren't enough for moderation.

Tools and accessibility requirements:

Large print or reading support available for those who need it.

Opportunity to ask informal questions outside of meetings or training sessions:

- A WhatsApp group has worked well in the past (with tenant consent for sharing personal info).
- Some groups have stayed in touch even after the process ended!

Plain English score sheet provided to help tenants record scores and comments clearly:

- See **Appendix 01** for an example tenant evaluation score sheet.



On a recent procurement exercise, Echelon used only the moderated score from the tenant panel to provide the overall score for a quality question that they had previously designed.

By not diluting the tenant score as just one moderated score within the overall client evaluation team, and making bidders aware that this was the case, it gave greater emphasis to the value that the client placed on tenant engagement within the process and accentuated to tenants how important their role within the process was.

Dialogue/Negotiation/Supplier Presentations/Visits

Dialogue/negotiation

The Procurement Act 2023 sets out the definitions for dialogue and negotiation as below:

Dialogue – aimed at improving all parties’ understanding of the requirement, can happen at any or all stages of the procurement
Negotiation - a strategic discussion aimed at improving the supplier’s offer and creating an agreeable set of terms

The benefits of tenant engagement in the dialogues and negotiations stage:

- Enriches the conversations
- Encourages contractors to take early accountability for their commitments
- Builds transparency, trust, and shared ownership of the outcomes
- Adds authenticity to potential contractor selection
- Allows tenants to test whether bidders truly understand tenants’ needs
- Encourages contractors to take tenant focus seriously

The standards for tenant engagement in this stage are consistent with the previous stages:

- Managing tenant expectations
- Provide full training and role description
- Accessible in-person sessions
- Transport and refreshments

If you choose to include tenants in either dialogue or negotiation, you will need to ensure that they are fully briefed on the basic principles of this aspect of the procurement process, as below:

- Keep all discussions confidential, don’t share or compare proposals between bidders.
- Treat all bidders equally, giving them the same time and topics to discuss.
- Dialogue/negotiation isn’t scored and shouldn’t influence later scoring, only written submissions count.
- Keep conversations informal; tenants should ask open, honest questions to encourage dialogue.

Important measures to put in place



While tenants may volunteer to take part in the dialogue and negotiation, not all will feel comfortable speaking. Encourage active contribution by assigning each tenant a pre-agreed question to help them engage during the session.

If a tenant prefers not to speak, they can still attend as an observer and share feedback in a follow-up session.

You can assign a dedicated contact for the dialogue process (either the same contact throughout or specific to this stage) to ensure tenants know who to approach with questions or issues.

These measures help tenants feel confident and supported, enabling meaningful engagement that benefits everyone, and ideally, makes the experience enjoyable.

Supplier Presentations (Interviews)

The Procurement Act 2023 sets out the definition for supplier presentations as below:

Aimed at confirming that the proposals being made are deliverable.

Involvement in supplier presentations will be similar to the principles for dialogue and negotiation, with the main difference being that these will generally be scored, so tenants should be provided with the additional information and tools that will enable them to do this effectively and in line with the pre-determined criteria set for this part of the process.



Site Visits

The Procurement Act 2023 sets out the definition for site visits as below:

Aimed at identifying whether key supporting processes have been developed, necessary equipment has been obtained or configured or that systems and processes are in place to deal with the required demands/volumes.

Site visits to a contractor’s existing contract can give tenants valuable insight into how the contractor delivers services in practice and allows for interaction with wider members of the potential contractor's workforce.

As well as the formal discussions, tenants also have an opportunity to see working practices, and potential contractors approaches to some of the ‘softer’ aspects, such as cleanliness, working conditions and interactions between staff.

Points to consider and remember for sites visits are as below:

- ✓ Arrange logistics ensuring this meets all tenants needs e.g., transport, health and safety briefings
- ✓ Consider making visits more structured so tenants are clear on the intent of the visit and their role e.g., a checklist of things to observe
- ✓ Assign a staff lead to guide and support tenants during the visit.

I took real pride in being part of the selection process. Working alongside other involved tenants, I genuinely felt that our voices made a difference.

Involved Tenant - CHS

Echelon's client wanted to actively involve tenants in site visits. While client staff were shown the operational aspects of the contractor’s site offices, the contractor arranged for tenants from an existing contract to meet with the visiting tenants. This peer-to-peer discussion took place without the contractor present, helping the tenants feel more at ease and encouraging open, honest conversations

Post-Contract Award

Tenant engagement should not end once the contract has been awarded. The ongoing contract management and performance monitoring over the full term is an opportunity for tenants to continue to influence and shape the ongoing delivery and ensure quality is not only maintained but continually improved.

Continued engagement also ensures that tenants voices are central to the day-to-day service delivery and decision making (where relevant) and can help to identify issues early and then collaboratively shape solutions. This engagement also further reinforces the trust and transparency between the landlord, contractor and tenants.

Opportunities to continue tenant engagement post-contract award:

Tenant-Led Contract Monitoring/Scrutiny Panel

A formally appointed group of tenants who regularly review contractor performance. Their role is to hold both the landlord and contractor accountable, identify areas for improvement, and represent the wider tenant community. The panel plays a key role in post-award contract management, ensuring the tenant voice is consistently heard and acted upon.

Typically, the panel includes 6–12 tenants of diverse ages, backgrounds, and property types from across the contract area. Membership usually lasts 1–2 years, with rotation encouraged to broaden participation, while allowing reapplications to maintain continuity.

Supported by staff, the panel agrees on clear terms of reference or a service level agreement with the landlord and contractor. Meetings are held every 2–3 months, with relevant documents shared in advance for review.

Panels may choose to focus on specific service areas such as empty homes, call centres, or key performance indicators (KPIs). Their findings are compiled into formal reports, highlighting trends and recommending improvements. These are presented to the landlord and contractor for discussion and agreement on implementation. The panel then monitors progress and reports on outcomes. A sample agenda is available in Appendix 02.

Benefits for landlords	Benefits for tenants
Balanced perspective on performance monitoring	Greater influence over services
Earlier warning of emerging issues or dissatisfaction trends	Build understanding and influence
Better alignment with Tenant expectations, bringing credibility to the process	Increases trust and transparency
Stronger relationships with Tenants	Encourages wider Tenant Involvement

Final reports may be published independently or as part of the annual review. Key findings can also be shared online as “You said, we did” updates, showcasing improvements made.

Panel members receive training on the contract structure and relevant service areas (e.g., KPI definitions), along with practical skills such as reading dashboards, interpreting data, and applying constructive challenge techniques.



Strategic Core Groups or Contract Management Review Meetings

Tenant engagement in strategic core groups or contract review meetings is similar to that of scrutiny panels, with the key difference being that these meetings are led by the landlord and typically include just one tenant representative.

Rather than attending as observers, tenant representatives should actively contribute by:

- Verifying that reported contractor performance reflects real tenant experiences
- Highlighting systemic or emerging issues from a tenant perspective
- Advocating for clearer communication and tenant-focused improvements

They serve as the “tenant lens” in the room, ensuring the contractor is not only contractually compliant but also responsive to the needs of tenants.

Training for these meetings should mirror that of scrutiny panels, covering key contract terms, roles and responsibilities, confidentiality, conduct, and how to interpret reports and performance data.

Providing clear, ongoing support helps ensure tenant representatives feel confident, enabling their input to be honest, valued, and impactful.

To prepare tenants for participation in meetings, Echelon has previously:

- ✓ Provided a ‘jargon buster’ as a reference guide when reviewing documents
- ✓ Converted key contract documents to plain English and/or remove abbreviations or ‘jargon’
- ✓ Held short pre-meetings to run through the meeting agenda and ensure a full understanding of each agenda item
- ✓ Identified/prepared and rehearsed any key questions to be asked
- ✓ Where appropriate, ensures reports are available in an accessible form
- ✓ Provided a key contact to act as a liaison and co-ordinator
- ✓ Held a short de-brief after the meeting to provide clarity on any areas that may not have been clear

Mystery Shopping

Mystery shopping requires tenant volunteers to act as regular service users (without revealing their role) to test how well specific services are delivered. It's ideal for tenants who may have limited time but still want to contribute meaningfully on an adhoc basis.

This approach captures the real tenant experience, helping landlords identify gaps between policy and practice, and complements formal contractor performance data.

Mystery shoppers can assess any part of the customer journey across all service channels, such as:

Repairs Booking – Ease of reporting a repair, phone wait times, website/app usability, and appointment availability.

Call Handling & Communication – Promptness, politeness, clarity of information, and accuracy of follow-ups.

Repair Delivery & Follow-Up – Punctuality, ID checks, respect for the home, first-time fix rates, and post-repair communication.

Complaint Handling – Clarity and fairness of the process, and timeliness and appropriateness of responses.

Tenant mystery shoppers can be recruited via website ads, newsletters, forums, or tenant panels. Aim for a diverse group to reflect a range of tenant experiences and perspectives.

Training should cover:


- **Process Overview** – Clarify the objectives, expected outcomes, and how the findings will be used.
- **Observation & Assessment** – Explain the scoring method (e.g., 1–5 scale or descriptive ratings like excellent/satisfactory/poor), and ensure everyone understands what each rating means for consistency.
- **Recording Findings** – Use a standard template with prompts for key information (see example in Appendix 03).



It's important to set clear boundaries for tenant volunteers, making it clear that these exercises are not a forum for raising personal issues.

Findings from mystery shopping should be summarised in a report and reviewed alongside complaints data and service trends to identify recurring issues, customer service strengths, standout staff, and gaps between promised and actual service delivery.

Top tips for effective mystery shopping exercises:

- 
- Keep the exercises/programme manageable—start with one or two key focus areas
 - Brief tenant volunteers in advance – a 'role play' of a typical mystery shop is often useful
 - Ensure tenant volunteers understand boundaries and roles
 - Use a formalised feedback form or online survey
 - Use insights alongside, not instead of, data and complaints trends
 - Ensure mystery shoppers see the outcomes of the information they have provided

Tenant Forums

Tenant forums, whether in-person, online, or hybrid, offer tenants a regular opportunity to engage directly with their landlord and contractor. These forums cover all aspects of service delivery, including performance, quality, and overall experience.

They serve as:

- A space for feedback and collaborative service design
- A platform for testing new ideas or technologies (e.g., video diagnostics, operative tracking)
- A way to build trust, relationships, and shared ownership of services
- The focus is on listening and problem-solving, not assigning blame.

Setting Up a Tenant Forum

It’s important to clearly define the forum’s purpose and structure from the outset:

Purpose: Is the forum advisory, decision-influencing, or purely for feedback? Will it focus on one service or cover a broader range?

Structure: How often will it meet—monthly, bi-monthly, or quarterly? Will meetings be in-person, online (e.g., Zoom or MS Teams), or hybrid?

Increasing Engagement

Start small with a few committed tenants and grow as interest builds. To increase accessibility and engagement:

- Hold meetings in community centres or on estates, not just at client offices
- Vary meeting times to suit different schedules
- Offer incentives:
 - Coffee mornings for older or isolated tenants
 - Activities for children to help young parents attend

Creating a Welcoming Environment

Regardless of format, forums should be:

- Inclusive and informal
- Well-facilitated
- Safe and welcoming spaces where tenants feel confident sharing their views

A valuable way to ensure continued interest and make use of the vast array of skills tenants have to offer, is to include a variety of tasks and activities at forums, rotating these for refreshed views from different groups. Some of examples of how you can facilitate this are below:

Suggested Activity	Example
Experience sharing	Collect ‘real’ stories – “How was your last repair”
Themed discussions	Focus on a single topic such as damp & mould, missed appointments or follow on work
Test new ideas	Workshop proposed changes to services or processes to gauge views
Surveys and polls (Email or text)	Quick one-off surveys or snap polls e.g., “What are your thoughts on the use of video calls for diagnostic repairs?”
Q&A sessions	Invite contractor representatives, or key service leads for open discussions and questions
Mini projects	Ask the group to co-design a new information leaflet or website page

Top tips for success:

- Avoid making forums formal or stuffy – keep sessions light and friendly
- Always follow through on actions – listen to what’s been said and show the impact/outcome
- Offer both online and offline ways to attend/engage
- Keep the groups open to new members

Procurement Act 2023

The Procurement Act 2023 (PA23), introduced on 24 February 2025, is a new law that will significantly change public procurement in the UK. With the aim to simplify and improve the procurement process by introducing a single set of regulations for all public procurement.

Overview and Scope

The Procurement Act 2023 is a major reform of the UK's public procurement system, designed to make it simpler, more transparent, and more flexible. Its goals include delivering better value for money, encouraging innovation, and improving access to public contracts; especially for small businesses and social enterprises.

A key feature of the Act is its strong emphasis on transparency and accountability in public spending. This focus presents an opportunity for landlords to involve stakeholders (particularly tenants) in procurement decisions, ensuring that services better reflect their needs.

One of the most significant changes introduced by the Act is the Competitive Flexible Procedure (CFP). This new approach replaces older multi-stage methods (such as the Restricted and Competitive Dialogue procedures) with a single, adaptable framework. Under the CFP, contracting authorities can design bespoke procurement processes tailored to their specific needs. This may include multiple stages, negotiations, and dialogue with suppliers, allowing for more dynamic and collaborative procurement.

The CFP is especially valuable for clarifying requirements and co-developing solutions, making it an ideal mechanism for engaging tenants in shaping services. It also helps reduce barriers for diverse suppliers, including SMEs, by allowing processes to be more responsive to market conditions.

It's important to note that while the Act applies across the public sector, it is not housing-specific. As a result, much of its language is generic, with limited direct reference to tenant involvement. However, the flexibility it offers can be leveraged to embed tenant engagement meaningfully within procurement strategies.



Objectives

Several of the objectives set out within the Act should encourage Contracting Authorities (in this case Housing Associations and Local Authorities) to consider engaging tenants to ensure alignment with the requirements of the Act. Several of these points are considered below:

Delivering Value for Money

The Act mandates that contracting authorities prioritise efficiency and the best mix of quality and value when procuring goods, services, and works. This means not just choosing the cheapest option but considering the overall long-term benefits.

Maximising Public Benefit

Procurements should be designed to have a positive impact on society, the economy, and the environment. This includes considering the broader social and economic impact of the procurement decision.

Transparency and Accessibility

The Act promotes a "transparency by default" approach to procurement, meaning that contracting authorities should share information about their procurement policies and decisions, making it easier for suppliers to understand and engage with the process.

Acting with Integrity

All procurement decisions must be made ethically and fairly, ensuring that the process is transparent and open to scrutiny.

Adhering to the National Procurement Policy Statement (NPPS)

The NPPS outlines the UK government's procurement priorities and provides guidance to Contracting Authorities on how to deliver projects and engage with suppliers. The NPPS encourages public bodies to prioritise social value in their procurement decisions, focusing on creating high-quality jobs, fair working conditions, and opportunities for progression.

Strengthening Oversight

The Act introduces new measures for oversight to ensure compliance with the regulations and promote best practices in public spending.



Conclusion

Although the Procurement Act 2023 does not explicitly require tenant engagement, its underlying principles suggest that meaningful involvement of tenants throughout the procurement process is encouraged to help achieve the Act's objectives.

Summary

Meaningful Tenant Engagement: A Non-Negotiable for Service Excellence

Tenants live the day-to-day reality of housing services such as, booking appointments, waiting for operatives, managing disruptions, and assessing the quality of completed work. Their first-hand experiences often reveal issues that data alone can miss, such as poor communication or a lack of respect from operatives. Engaging tenants directly provides a more accurate picture of how services perform in practice.

Engaging tenants in monitoring, decision-making, and evaluation helps hold landlords and contractors accountable. When tenants have a voice in contract meetings, scrutiny panels, and service reviews, it increases transparency in performance discussions and ensures better contract compliance.

Co-designing services with tenants ensures they are inclusive, accessible, and fit for purpose. Tenants can help test new tools (like video diagnostics), refine communications (such as appointment letters), and improve processes (like feedback loops) based on real-world usability.

Meaningful engagement (especially with underrepresented groups) ensures services work for everyone, not just the digitally confident or vocal minority. It also creates opportunities for volunteering, skill development (e.g. scrutiny, interviewing, data analysis), and employment pathways, aligning with broader goals around social value, empowerment, and place-making.

Engaged tenants can identify barriers faced by digitally excluded tenants, older people, or those with language challenges. This shared oversight builds trust, particularly where services have historically underperformed or received complaints.

Proactive tenant engagement shows that tenants are valued not just as service users, but as partners in shaping public services. It shifts relationships from transactional or complaint-driven to ones based on mutual respect and collaboration.

In a sector under constant scrutiny, meaningful tenant engagement is essential to demonstrating good governance, transparency, and community responsibility.

Working closely together and having direct contact with heads of service during the procurement, broke down the 'us and them' divide. It felt like genuine collaboration, not just consultation.

Involved Tenant - CHS

Practical steps for tenant engagement	
Recruit tenants early and as widely as possible	Use website, newsletters, Facebook pages, community notice boards etc and ensure diversity and accessibility.
Define roles	State clearly what tenants are required to do, how their input will be used and what training will be provided .
Provide training	Cover procurement basics, how to observe objectively, how to ask questions, how to score or provide feedback and ensure that training is adapted to suit all needs, and regularly repeated and refreshed.
Set expectations	Be clear about the commitment of time that will be required, the number and location of sessions and what support is available.
Provide support	Assign a dedicated member of staff or key contact, ensure all materials are offered in accessible formats, and ensure tenants feel comfortable and confident to ask questions if something isn't clear.
Gather and use feedback and broadcast successes	Collect tenant observations, incorporate findings into reports and reviews, celebrate successes “you said, we did” and ensure tenants can see the outcome of their input in practice.
Recognise and value tenant's contributions	Thank tenants for their involvement, keep them updated on actions and next steps of ongoing issues, and encourage them to share their contributions and engagement journey with other tenants and groups.



Appendix 01

1 Instructions

SERVICE PROVIDER	
SCORER	

Each question will be scored 0-5

To enable us to provide constructive feedback to all contractors please provide comments, both positive and negative against each section. Comments on why a score is given **MUST** be provided for each question

The following 0 to 5 scoring system will be used:

Score	
0	No answer provided.
1	Very weak answer and unable to demonstrate an understanding of the client's requirements and little or no evidence of how the contractor will meet them.
2	Weak answer with limited demonstration of understanding of the client's requirements and very limited evidence of how the contractor will meet them.
3	Satisfactory answer demonstrating satisfactory understanding of the client's requirements and some evidence of how the contractor will meet them.
4	Good answer demonstrating a good understanding of the client's requirements and good evidence of how the contractor will meet them.
5	Excellent answer demonstrating a deep understanding of the client's requirements, excellent evidence of how the contractor will meet and exceed them, with no areas of improvement suggested.

2 Questions

Question number	
Question theme/name	

[Question text here]

[Page limit for question here]

SCORE	
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COMMENTS

Positives to note in relation to response submission:

If the Service Provider did not achieve a 5 – what could they have done to have scored a higher mark?

Appendix 02

Example tenant-led contractor monitoring panel agenda

Agenda

Date: [Insert Date]
Time: [Insert Time]
Venue: [Insert Location / Virtual Link]
Chair: [Tenant Panel Chair Name]
Facilitator: [Client Lead Name]

1. Welcome, Introductions and Apologies (5 mins)

- Chair to welcome attendees
- Apologies noted
- Confirm agenda and objectives of the meeting

2. Review The Minutes From The Last Meeting and Matters Arising (10 mins)

- Approve previous minutes
- Update on agreed actions
- Address any carry-over issues

3. Contractor Presentation: Current Performance Overview (15 mins)

- KPI performance (e.g. completion rates, satisfaction scores, time to attend/complete)
- Volume of repairs raised and completed
- Appointments kept vs. missed
- Complaints and learning
- Health and safety incidents

4. Tenant Feedback and Case Studies (15 mins)

- Summary of recent tenant feedback from surveys, complaints, compliments
- Case studies or real examples of service experience
- Tenant stories presented anonymously (with permission) to highlight success or areas of concern

5. Deep Dive: Key Service Area (e.g. Damp and Mould/Missed Appointments) (20 mins)

- Panel to explore a specific issue in detail
- Contractor response and discussion
- Identify possible recommendations

6. Action Plan Review and Improvement Tracker (10 mins)

- Review progress against previous recommendations
- Identify what has improved and what still needs addressing

7. Resident Priorities and Future Focus Areas (10 mins)

- Panel to agree priority issues for next quarter
- Confirm theme/focus for next meeting (e.g. emergency repairs, vulnerable residents, digital access)

8. Any Other Business (AOB) (5 mins)

- Open floor for panel members
- Note any questions or suggestions for contractor or client

9. Date of Next Meeting and Close (5 mins)

- Confirm next meeting date/time
- Summarise agreed actions and responsible parties

Supporting Documents (to be circulated in advance):

- Latest KPI report
- Contractor performance dashboard
- Complaints and feedback summary
- Case studies
- Action/improvement tracker
- Any relevant policy updates or repairs strategy changes

Appendix 03

Tenant Mystery Shopping Template - Responsive Repairs Service

Mystery Shopper Name:

Date of Mystery Shop:

Time:

Contact Method Used (Phone / Online / App / In Person):

Repair Type (e.g. leaking tap, broken light switch):

1. Initial Contact and Accessibility

Question	Yes	No	Comments
Was the contact method easy to use (phone line answered promptly, website easy to navigate)?			
Were you given clear instructions on how to report the repair?			
Was the person you spoke to polite and professional?			
Did they ask relevant questions to diagnose the issue?			
Did they confirm your contact details accurately?			

2. Repair Appointment Booking

Question	Yes	No	Comments
Were you offered a suitable appointment date/time?			
Were your needs or preferences (e.g. access issues, working hours) considered?			
Was the appointment confirmed (e.g. verbally, by text/email)?			
Were you told what would happen next?			

3. Pre-visit Communication

Question	Yes	No	N/A	Comments
Did you receive a reminder before the visit (e.g. call, SMS, email)?				
Were you told who would be attending (contractor name, ID, etc.)?				
Were you informed about any delays or changes to the appointment?				

5. Repair Visit Experience

Question	Yes	No	Comments
Did the operative arrive on time (within appointment slot)?			
Did the operative show ID and introduce themselves?			
Was the repair completed during the first visit?			
If not completed, were next steps explained clearly?			
Was your home treated respectfully (e.g. tidy, no damage, polite conduct)?			
Did they wear appropriate uniform/PPE?			

6. Overall Assessment

Rating	Score (1 = Poor, 5 = Excellent)	Comments
Ease of reporting the repair	1 2 3 4 5	
Quality of communication	1 2 3 4 5	
Operative professionalism	1 2 3 4 5	
Quality of the repair	1 2 3 4 5	
Overall experience	1 2 3 4 5	

7. Recommendations/Observations

Use this space to note anything that stood out — good or bad — and suggest improvements or examples of great service.



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