



STAR features

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Version 1.1

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The STAR project at HouseMark has been led by Vicki Howe, Business Data Analyst, with support from her colleagues across the organisation.

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1. Introducing STAR

HouseMark is delighted to launch this new, voluntary approach to tenant and resident¹ satisfaction measurement for the social housing sector. Such an approach is essential if social housing providers² are to have a means of comparing key satisfaction results – both benchmarking with others and trends over time. Our approach has been widely consulted on and is available for any social housing provider to follow.

After English government departments and regulators signalled the ending of requirements to conduct the former standard (the STATUS survey), HouseMark was inundated with requests from our members to devise a standardised approach to measuring satisfaction that could replace STATUS on a voluntary, self-regulatory basis. We have worked with our members, as well as the National Housing Federation (NHF), Chartered Institute of Housing (CIH), Tenant Participation Advisory Service (TPAS) and Tenants and Residents Organisations of England (TAROE) to develop STAR, and received over 260 responses to our consultation paper, *STAR points*. Some tenants, residents and market research companies also gave their views.

Our extensive consultation was important because STAR, unlike STATUS, does not carry the weight of a regulatory requirement. We are very pleased that the overwhelming message from the feedback we have received is that social housing providers will be adopting STAR. Out of the social housing providers who participated in the consultation, we believe that well over 200 plan to conduct STAR surveys. Others, who did not take part in the consultation, have since contacted us and said they will also adopt STAR. We know many are preparing to carry out STAR surveys in the autumn of 2011.

Although our consultation found extensive support for our proposals, there were some differences of opinion and practice in certain areas. To reflect this reality, STAR is more flexible than STATUS was. Social housing providers were most divided on the method by which STAR surveys should be conducted (by post, telephone, face-to-face, on-line). This split was evident not only on the method by which they are willing to conduct surveys in the future but also how they are carrying them out now.

In response, STAR is more flexible on method than STATUS was. However for comparative purposes, social housing providers undertaking HouseMark STAR/STATUS benchmarking will be able to filter to remove those who have adopted a different method, should they so wish.

This *STAR features* is one of a series of free STAR publications available at www.housemark.co.uk/star. Together they provide the necessary information and guidance to enable you to create and run your STAR surveys – either in-house or by commissioning specialist market researchers:

¹ We use the terms tenant and resident throughout the STAR publications as surveys can apply to tenants of rented properties (typically, general needs, housing for older people and supported housing) and home-owning residents of leasehold and shared ownership properties.

² We use the term social housing providers throughout the STAR publications to describe social housing landlords and their managing agents. This term emphasises that where ownership and management are split between different organisations, it is usually the manager (i.e. the provider) of the housing service who organises surveys of the tenants and residents.

- **STAR features**
This outlines the key elements and benefits of STAR and explains why HouseMark took the lead in this initiative. It is intended for anyone who wants to find out more about STAR and is essential reading for anyone who commissions or runs their own STAR surveys.
- **A guide to running STAR**
This detailed guide on how to run a STAR survey covers questionnaire design, selecting representative samples, checking returns are representative, different survey methods and more. This is useful reading for anyone commissioning or running STAR surveys.
- **STAR count**
This is a comprehensive report of the results of the consultation exercise which HouseMark undertook when developing STAR. It provides background information on why particular decisions were made as a result of the consultation in relation to STAR.
- **STAR questions**
This is a full listing of STAR's core and optional satisfaction questions and the suggested demographic questions, grouped according to theme. This is a useful resource in deciding which questions should make up STAR surveys to suit your needs.

The original March 2011 consultation document (*STAR points*) can also be downloaded for reference purposes, but is now superseded by the publications listed above.

2. STAR in brief

2.1 Building your survey

You build up your own questionnaire from core, optional and demographic questions contained in our library of *STAR questions*. As a minimum, it should include the core satisfaction questions, plus core demographic questions (unless you already hold the exact same demographic data elsewhere). The core questions cover the key measures of satisfaction and are the basis for comparisons. You can add additional questions – by choosing from the optional ones in *STAR questions* or you can devise your own.

2.2 Rating scales

For all the core satisfaction questions and most of the optional satisfaction questions, the standard response options are:

Very satisfied, Fairly satisfied, Neither, Fairly dissatisfied, Very dissatisfied

For certain questions these response options are not appropriate. See *STAR questions* for the response options for each individual question.

2.3 Representative sample surveys

It is not feasible for most social housing providers to survey all tenant and resident opinion (i.e. carry out a census). Sampling will have to be carried out in the majority of cases. For all STAR surveys, samples need to be representative and we provide advice in *A guide to running STAR* on how to achieve this including the important step of checking and correcting for unrepresentative sub-groups. We also advise on the required minimum number of survey returns for a given population size to ensure statistical validity.

2.4 Permitted survey methods

As long as the requirements for a statistically robust and representative survey are met, STAR can be conducted by post, telephone or face-to-face. While on-line surveys can also be used, in view of the likelihood that these would not be representative of the wider population, we recommend that they should only be used to supplement one of the other three main survey methods.

2.5 Links to HouseMark benchmarking services

Data from the STAR core questions will replace STATUS data in HouseMark's core benchmarking service, its STAR/STATUS benchmarking service and other specialist benchmarking services including PI Tracking. We will develop our current STATUS benchmarking service into a STAR/STATUS service.

2.6 Costs of STAR

Our STAR guidance is freely available to anyone and our benchmarking services incorporating STAR data are included in our standard subscription fee. HouseMark has resourced the development of STAR ourselves and this new initiative will not impact on our subscription fee levels. All social housing providers adopting STAR principles into their surveys have to resource the running of these surveys themselves. As was also the case with STATUS, you can carry out STAR surveys in-house or outsource to specialist market researchers.

2.7 Survey frequency

For the purposes of HouseMark benchmarking, we will require that satisfaction data derived from STAR surveys is not more than two years old. We anticipate many social housing providers will choose to conduct STAR surveys more frequently. Data from on-going surveys will also be accepted into HouseMark benchmarking provided samples are representative and minimum numbers of returns are achieved over a year.

3. Why measure satisfaction using STAR?

STAR surveys are about measuring tenant and resident satisfaction and as such they are about identifying whether social housing providers are meeting, exceeding or failing expectations. Satisfaction measurement is also about gathering robust, actionable data to inform business decisions on changes to service delivery. Without subsequent action, satisfaction measurement has no purpose. Without the robustness, any action may be misdirected.

A key element of the STAR framework is that it provides a standardised approach to satisfaction measurement that enables providers to make meaningful performance comparisons with the hundreds of other providers working in the sector and monitor trends over time. The flexibility built into the STAR approach ensures that providers are able to measure what they need to in ways that best suit their organisational and tenant and resident needs.

In the emergent environment of co-regulation, and tenant and resident-led self-regulation, access to satisfaction data has become more rather than less important to social housing providers. In the absence of close regulatory scrutiny or housing inspection, satisfaction measurement is the single most useful source of data for reporting tenant and resident-focused outcomes and engaging tenants and residents in what their social housing providers do. Put together with cost and performance data in HouseMark's core benchmarking service, it provides the basis upon which value for money can be judged (i.e. not just whether providers are doing the right things but also whether they are doing things right) and identify the best opportunities for improving performance.

STAR is intended to provide an overview of tenant and resident satisfaction with the general services they receive from their social housing provider. STAR is not ideally configured to conduct feedback surveys of *specific* services where only a proportion of tenants or residents receive those particular services. Rather, we would encourage social housing providers to conduct regular or even continuous surveys of specific services as the most effective means of identifying weaknesses in service delivery and identifying the necessary improvements. These surveys can be used to complement the more general attitudes about the social housing provider that are explored in STAR surveys. However, where a social housing provider judges that their whole survey population experiences a service or problem, the flexibility of the STAR system allows for questions on those topics to be included.

4. The essentials

4.1 Building your survey

A key feature of our STAR framework is that providers can decide what and how many questions they wish to ask. Unlike STATUS, there are no standardised survey questionnaires within STAR, and social housing providers choose the detail and length of their questionnaires themselves. In doing so, the following steps should be followed to build a STAR survey.

1. Build the survey around the core satisfaction questions, including the rent and service charges value for money questions as appropriate (see section 4.2).
2. Review the library of STAR optional satisfaction questions by reference to the characteristics of the survey population and decide which are to be included in the survey (see *STAR questions*).
3. Identify any additional satisfaction questions of your own to be included.
4. Adopt the appropriate rating scale for each question (see section 4.3 and *STAR questions*).
5. Identify any additional data collection to be included (e.g. email addresses).
6. Add the core demographic and any optional demographic questions (see *STAR questions*). Social housing providers who have a complete set of exactly matching and current demographics in their tenant profiling database can choose to omit these questions and instead link their survey returns with their profiling data.
7. Determine the order of the survey questions and what if any headings are to be used.
8. If you wish, add an open-ended question towards the end of your questionnaire (for example, Is there anything else you would like to say about your home and/or services [your social housing provider] provides?)

The result of this could be a survey questionnaire ranging from just the core questions to a more extensive questionnaire incorporating core, optional and additional questions.

Throughout the STAR questions, we use the general term '[your social housing provider]'. This is not the term to be used in the actual questionnaire: social housing providers should insert the name of their organisation here.

4.2 Core questions

All STAR surveys should include the following core satisfaction questions:

Table 1: the STAR core satisfaction questions excluding the value for money questions

Code	Question
Cor1	Taking everything into account, how satisfied or dissatisfied are you with the service provided by [your social housing provider]?
Cor2	How satisfied or dissatisfied are you with the overall quality of your home?
Cor3	How satisfied or dissatisfied are you with your neighbourhood as a place to live?
Cor6	Generally, how satisfied or dissatisfied are you with the way [your social housing provider] deals with repairs and maintenance?
Cor7	How satisfied or dissatisfied are you that [your social housing provider] listens to your views and acts upon them?

The set of core STAR questions is completed with the addition of one or both of the following value for money questions:

Table 2: the STAR core value for money questions

Code	Question
Cor4	How satisfied or dissatisfied are you that your rent provides value for money?
Cor5	How satisfied or dissatisfied are you that your service charges provide value for money?

We believe that it will be useful for providers to understand satisfaction that 'rent provides value for money' and satisfaction that 'services charges provide value for money' separately. We have also taken the view that, in general, tenants understand service charges are for specific services and are able to distinguish between the value for money they receive from their rents and the value for money they receive from service charges.

Providers will need to review their survey population to identify whether one or both questions should be asked. For STAR surveys involving rent payers (e.g. tenants of rented properties), providers will need to ask:

- Only the rent question if there are no service charges
- Both questions if tenants pay service charges which are distinct from their rent

Of course, where no rent is charged (e.g. leaseholders) providers will need only to ask the service charge question.

Things get a little more complicated when a survey includes both rent payers and leaseholders, or some tenanted properties have service charges and some do not. We advise that both questions have a 'not applicable' option inserted in these circumstances, as is shown for these questions (Cor4 and Cor5) in *STAR questions*.

4.3 Rating scales

The core STAR satisfaction questions and the majority of the optional STAR satisfaction questions are phrased 'How satisfied or dissatisfied are you ...' and have a five-point descriptive rating scale (i.e. Very satisfied; Fairly satisfied; Neither; Fairly dissatisfied; Very dissatisfied)³. We have included the 'Neither' option since this provides respondents with an opportunity to state they are neither satisfied nor dissatisfied and hence encourage a response to the question in all cases. Without this option, respondents may choose to miss out certain questions altogether because they feel they are not being provided with an option relevant to them. The five-point descriptive scale also retains the ability to compare trends over time with the STATUS survey.

However, we recognise that in exceptional cases certain providers have invested in establishing surveys based around an alternative rating scale. For this reason we have built in limited flexibility in the use of rating scales where it is not feasible for the provider to adopt the five-point descriptive ratings.

In these circumstances, data from providers using a five-point or a ten-point numeric scale will be accepted into HouseMark benchmarking systems for STAR questions specified by the five-point descriptive scale if converted as follows:

Table 3: converting HouseMark rating scale to numerical scales with base five

HouseMark scale	10 point scale (10 high, 1 low)	5 point scale (5 high, 1 low)
Very satisfied	9,10	5
Fairly satisfied	7,8	4
Neither	5,6	3
Fairly dissatisfied	3,4	2
Very dissatisfied	1,2	1

We will, however, flag such data so that other benchmarking users are aware that a different rating scale was used. Scales not compatible with a base number of five (e.g. four-point, seven-point, 11-point, zero to ten scales) will not be accepted into HouseMark benchmarking for STAR questions specified by the five-point descriptive scale.

In addition to the main five-point verbal scale, a number of STATUS questions used a different rating scale (Easy/Difficult/Neither and Helpful/Unhelpful/Neither). In the interests of continuity we have retained these scales where appropriate in the STAR optional questions. The same conversion and compatibility principles as above apply.

³ Core STAR satisfaction questions Cor4 and Cor5 can have a 'not applicable' option added in certain circumstances as described in section 4.2. This is also the case for some of the optional STAR questions. However, the main rating scale for these questions is still the five-point descriptive scale.

4.4 Permitted survey methods

A degree of flexibility is built into the survey methods used to collect STAR data. Consequently, providers may choose to use postal self-completion, telephone interviews or face-to-face interviews. We anticipate most social housing providers will select a single method, perhaps with 'top-ups' of an alternative method appropriate for certain 'hard-to-reach' groups. On-line methods are also permitted as a supplementary method, rather than the primary method, unless there is strong evidence for the majority of provider's tenants and residents using on-line methods to communicate. Otherwise, the results from an on-line survey method would carry significant response bias (i.e. where the respondents are not representative of the whole tenant and resident population).

We have adopted this flexible position for a number of reasons:

- There are advantages and disadvantages to each of the available survey methods, and providers should be able to choose which method best meets their business needs and the needs of their tenants and residents. Furthermore, there is no firm evidence either way on whether postal self-completion and telephone interviews (the two main survey methods used by providers) produce significantly different results for identical satisfaction questions.
- Some providers have developed a preference for gathering satisfaction data through telephone and/or face-to-face interviews and have already adopted such methods. Indeed, a few have invested in telephone systems to aid this purpose and are reluctant to change their approach.
- We wish to maximise the inclusiveness of STAR surveys, the number of providers participating in STAR, and the availability of comparative performance by limiting the exclusion of data on the grounds of the collection method used.

We accommodate this flexibility in survey methods within our benchmarking services by requiring providers to identify the method or combination of methods used when submitting STAR data to HouseMark, by flagging the methods used in our output results and, in our STAR/STATUS benchmarking service, by providing an option to filter results by survey method. This means providers have the ability to compare like-for-like methods only if they so choose or to compare across the pooled methods.

In practice, at least initially, we think it likely that STAR surveys will be primarily conducted using a postal self-completion approach. Over time, the most common choice may move to postal with an option to respond on-line. Providers may choose to supplement these two methods with telephone and/or face-to-face data collection, particularly for certain groups of tenants and residents (e.g. those whose first language is not English) who may need greater levels of assistance in completing the STAR questionnaire. In a smaller number of cases, we expect providers will choose to use telephone and/or face-to-face interviews as their primary survey method. Others may choose different methods for different tenure types (e.g. postal for general needs tenants, face-to-face for supported tenants, telephone for leaseholders or shared owners).

All of this comes with two important caveats. Firstly, in sample surveys, whatever method is used the samples need to be randomly selected (see section 4.6). Secondly, the prescribed wording of the STAR survey questions needs to be adhered to whatever method is used if it is to be included within HouseMark's benchmarking data (see *STAR questions*).

4.5 Survey frequency

In deciding how frequently to carry out STAR surveys, providers need to take into account three main considerations:

- Data validity (i.e. whether their satisfaction data remains valid in making comparisons with previous surveys and with other organisations)
- Utility value (i.e. whether their satisfaction data remains useful in informing business decisions and action to improve services)
- Costs (i.e. whether expenditure of resources on satisfaction measurement would represent good value for money).

For these reasons, and in line with what most providers have told HouseMark, we have decided that for benchmarking purposes there should be no more than a two-year gap between surveys. Thus, HouseMark will only accept satisfaction data collected within the past two financial years (i.e. when core benchmarking data is collected for 2011/12, satisfaction data will be accepted if the fieldwork took place during the 2010/11 or 2011/12 financial years). The same applies to subscribers to Skills & Projects' benchmarking (SPBM) service for smaller providers.

We are aware that some providers will choose to conduct their surveys more frequently than every two years, and they are of course free to submit updated data to HouseMark on an annual basis should they wish to do so. For surveys which are conducted more frequently than once a year, the annual submission to HouseMark should be the aggregated total for the year.

4.6 Representative sample surveys

Sampling is the process that selects a representative proportion of tenants or residents to be surveyed. We provide guidance on sampling and applying the specific requirements for STAR in *A guide to running STAR*. This guidance also explains confidence levels and margins of error, which for STAR are being set (as a minimum) at:

Table 4: STAR margins of error at 95 per cent confidence level

Population size	Required margin of error
0 – 1,000	+ / - 5 per cent
1,000 – 10,000	+ / - 4 per cent
10,000 and above	+ / - 3 per cent

A minimum number of replies is necessary to achieve the required margin of error, and this minimum varies according to the population size. Table 2 of *A guide to running STAR* provides the minimum numbers for a range of population sizes and you should refer to this table when preparing your sample. For example, a population size of 1,000 would require 275 returns as a minimum; a population size of 2,000 would require 470 minimum returns; a population size of 5,000 would require 525 minimum returns; a population size of 15,000 would require 975 minimum returns.

Note that these minimum numbers of replies only apply for an analysis across the whole stock covered by a survey. If you want to analyse your results at the level of sub-groups (e.g. by area office or stock type) while retaining the desired margin of error then the minimum number of replies across the whole stock would have to be increased (see *A guide to running STAR* for more details).

Once the survey fieldwork is complete, checks need to be carried out to ensure the distribution of responses is representative of the survey population as a whole. For example, checking by number of bedrooms in the property is a good test because all providers should have this information and it is a useful proxy for family size. Often responses from one-bed properties can be lower than elsewhere and satisfaction expressed by households without children (typically in one-bed properties) can be different from those with children (typically in larger properties). Where bias has been introduced through different response rates for different sub-groups, then either extra surveys should be conducted for the under-represented sub-groups (booster samples) or weighting should be applied to help correct the bias. Weighting is the application of correction factors to make the received responses representative of the whole survey population. Suggested processes for applying weighting are described in *A guide to running STAR*.

It is important that sampling and checking for representative responses is carried out for your STAR survey, as this is a key criteria that will be validated when HouseMark members submit their core STAR results for benchmarking. Those social housing providers wishing to conduct their STAR surveys in-house that do not have any internal statistical expertise may need to invest in some sampling advice from a market research company or a statistician in order to ensure their sample is representative. There are a number of organisations providing this type of service and support to the sector, including HouseMark. For a discussion on this with HouseMark, contact consultancy@housemark.co.uk or 024 7647 2703.

4.7 Which stock types to survey

Social housing providers manage a variety of types of housing stock (e.g. general needs, housing for older people, supported housing, leaseholder, shared owners). We have designed the core and demographic STAR questions so that they can be applied in surveys of any stock type. Some of the optional STAR questions also apply to any stock type, whereas other optional questions are specific to certain types of stock (e.g. questions about alarm call systems to tenants of housing for older people). The *STAR questions* library indicates the relevant stock type for each individual question.

Current government proposals for social housing reform will lead to an increase in the number of tenancies offered by social housing providers in England at sub-market rents (including affordable rents). Providers with reasonable numbers of affordable rents and/or market rents can use their stock records to split their STAR satisfaction results for internal reporting purposes by, say:

- Affordable rent
- Market rent
- 'Traditional' social housing rent

The *STAR questions* library does not currently contain questions specifically for affordable rent and market rent tenants, but we will develop this area should demand arise.

5. STAR and HouseMark benchmarking services

Data from the STAR core questions will replace STATUS data in HouseMark's core benchmarking service. This annual benchmarking exercise collects cost, performance, satisfaction and contextual data to help participants form value for money judgements through comparisons with others.

HouseMark's STAR/STATUS specialist benchmarking service focuses on comparable satisfaction data allowing participants to conduct a more in-depth analysis of their satisfaction results. We plan to extend this service beyond the core STAR questions to incorporate some, if not all, of the optional STAR questions from our extensive library.

The outputs of our STAR/STATUS benchmarking also indicate the survey method, season of survey, survey provider (including whether in-house or outsourced), rating scales, whether the survey was a one-off or part of an on-going continuous survey, whether weighting has been applied to the results and whether the required margin of error has been met.

HouseMark collects data from the social housing provider's most recent STATUS or STAR survey, provided that survey took place in the last two years. As STAR replaces STATUS over time, this satisfaction dataset will move from being purely STATUS to purely STAR. The following table shows the expected transition from STATUS to STAR data by data collection year.

Table 5: STATUS or STAR in HouseMark's benchmarking datasets

Data collection year	STATUS	STAR
2010/2011	✓	
2011/2012	✓	✓
2012/2013	✓	✓
2013/2014		✓

HouseMark collects STAR/STATUS, PI Tracking and core benchmarking data through our E-form. One of the benefits of the E-form is it speeds up and simplifies data collection by removing unnecessary duplication of data entry. Once you have completed your STAR survey you can enter the results in the STAR/STATUS section of the E-form. You will be able to compare satisfaction results in the STAR/STATUS benchmarking service immediately after you have input your data. The data for core STAR questions will also pre-populate the relevant parts of our annual core benchmarking and PI Tracking exercises so you do not need to enter it again when these submissions are due.

The essential criteria for a STAR survey and questionnaire as outlined in this document will be checked by HouseMark validators as part of our process for checking core benchmarking data.

HouseMark's E-form collects STAR/STATUS satisfaction data broken down according to the stock types⁴:

⁴ Currently the HouseMark definition for general needs and housing for older people stock incorporates 'traditional' social rents plus affordable rents. This is under review.

- General needs
- Housing for older people
- Supported housing
- Leaseholders
- Shared owners

with the option for general needs / housing for older people to be combined if the survey has not been conducted in a way to allow separate reporting. Wherever possible we recommend that general needs and housing for older people are reported separately as this will allow you to compare and analyse your data at a more detailed level. If you do enter separate figures for these two stock types, the E-form will automatically calculate the combined figure for you.

The satisfaction data that you enter in the E-form broken down by stock type must meet our required margins of error (see table 4 and section 4.6). In practical terms this means you need to achieve the required minimum number of responses for each separately reported stock type in your E-form entry.

6. STAR in Wales

Building up the satisfaction questions in the STAR survey from core and optional questions provides an opportunity for similar social housing providers to work together in a group to ask identical optional questions. Within that group, they will therefore have a greater number of questions to benchmark than the standard core questions.

During the development of STAR, some social housing providers in Wales quickly realised the benefits of this approach and helped generate a set of questions to test out tenant and resident opinion on the Welsh regulatory delivery outcomes. HouseMark consulted extensively with social housing providers, Community Housing Cymru and the Chartered Institute of Housing Cymru to define questions relevant to the delivery outcomes.

The resulting questions are contained in the Wales section of *STAR questions*. Social housing providers in Wales choosing to adopt this approach will be able to compare satisfaction across the UK using the core STAR questions and additionally satisfaction in Wales using the relevant questions linked to the Welsh delivery outcomes.

Further information

For further information visit our website

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About HouseMark

HouseMark is the leading provider of performance improvement and value for money solutions to the social housing sector and is jointly owned by the Chartered Institute of Housing and the National Housing Federation; two not-for-profit organisations which reinvest their surpluses in the social housing sector.