
Overview

This standard is about organising meetings with customers and stakeholders either individually or in groups. The meetings may take place in person or virtually through digital platforms or devices. It covers agreeing the purpose of meetings, conducting them in a manner which is acceptable to customers and recording agreed actions and outcomes.

You should operate within housing sector requirements of each devolved nation.

Performance criteria

You must be able to:

1. agree the aims of the meeting with customers and stakeholders and prepare an agenda
2. obtain the relevant information to organise the meeting
3. identify and confirm a time, date and place for the meeting with the relevant customers and stakeholders
4. provide participants with the relevant information and documentation for the meeting
5. confirm you have all the required information available to achieve the aims of the meeting
6. explain the aims of the meeting with meeting attendees
7. support attendees to ask questions and seek further clarification where required
8. complete the meeting within the identified meeting timescale
9. keep notes of the meetings and records agreed actions with timescales for completion
10. ensure that the results of the meeting are recorded in accordance with organisational and relevant legislative requirements

Knowledge and understanding

You need to know and understand:

1. the different types of meetings, formats and procedures for your organisation
2. the variety of digital tools and platforms for running the meetings
3. the range of technologies for conducting the meetings and keeping notes
4. the aims and agenda of the meeting
5. how to organise meetings and make the best use of time and resources
6. the information and devices required to set up the meetings
7. the information packs that may be required by meeting attendees
8. the types of requirements for attendees regarding access to virtual meetings, or facilities at available venues
9. the timing of the meeting and available support
10. the relevant health and safety requirements
11. how to maintain confidentiality in accordance with the relevant data protection legislation
12. the actions of the meeting and timescales for completion
13. the types of barriers to communication and how these can be minimised
14. the records which must be produced and kept of the meeting in accordance with your organisational procedures
15. your organisation's appeals and complaints procedures
16. the role of Housing Ombudsman in relation to handling complaints
17. your organisation's procedures for dealing with problems identified by customers
18. your organisational customer service standards and equality and diversity policy
19. your organisational standards which help the customers with their equality and diversity challenges
20. the relevant nation-wide and nation-specific legislation and regulations in the housing sector

INSHOU12

Organise meetings with customers and stakeholders in the housing sector



Developed by	Instructus
Version Number	1
Date Approved	06 Jan 2026
Indicative Review Date	31 Jan 2031
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	INSHOU12
Relevant Occupations	Housing Advisors, Housing Manager, Housing Officer, Housing Support, Supported Housing Officer, Housing Strategy Officer, Housing Assistant, Housing Administrator, Assistant Housing Administrator, Housing Support Officer/Assistant
Suite	Housing
Keywords	customers; colleagues; risk; safety; security; support; vulnerable; services; agreements; legislation; documentation; queries; accommodation; organise; property; interpreting
