**OAK TREE HOUSING ASSOCIATION**

**Protocol for Engagement with Elected Members**

Approved: January 2026 Review Date: January 2028

## 1. Purpose & Governance Alignment

Oak Tree Housing Association (OTHA) is committed to maintaining a professional, transparent, and structured approach when engaging with elected members, including MPs, MSPs, and Councillors. This protocol ensures that all interactions align with OTHA's governance framework, regulatory requirements, and GDPR obligations.

This protocol aligns with the following

Internal policies:

- OTHA Data Protection Policy (GDPR Compliance)

- OTHA Customer Engagement and Complaints Handling Procedures
- Code of Conduct for Staff and Committee Members

External guidance:

- Scottish Housing Regulator (SHR) Regulatory Standards
- Data Protection Act 2018

## 2. Communications Channels

To ensure integrity and a single organisational voice, staff should not correspond directly with elected members through personal or work emails. All engagement must be coordinated through Oak Tree Housing Association's approved channels, overseen by the relevant Director or the Chief Executive.

*Designated Inbox for elected members* – all correspondence must be directed to the dedicated Elected Members Inbox (electedmembers@oaktreeha.org.uk). All responses should be sent from the elected members inbox by the administration team.

*Phone & In-person contact* – staff should log enquiries and ensure GDPR compliance before sharing any tenant-related information.

To maintain transparency, consistency, and professionalism in all external communications, Oak Tree Housing Association staff must adhere to the following protocol when engaging with elected members (e.g., Councillors, MSPs, or MPs):

- *Communication Route*: All correspondence with elected members should be managed through formal Association channels. Staff should not engage directly with elected members via personal or individual work email accounts unless expressly authorised by a Director or the Chief Executive.

- *Authorisation*: Any direct contact initiated by an elected member should be reported immediately to the relevant line manager or Director. The response will then be coordinated and issued through the approved corporate communication pathway.
- *Purpose and Tone*: Communications should remain factual, professional, and limited to information that has been approved for release. Staff must not provide comment or opinion on policy matters, operational decisions, or individual cases without prior authorisation from a member of the Executive Team.

## 3. Recording & Data Protection Compliance

Record Keeping: All communications with elected members will be logged on to the elected members register centrally, to ensure a consistent audit trail and to support transparency in decision-making.

Maintaining the Elected Members Register – all enquiries will be logged to track status and resolution.

Confidentiality & GDPR – any tenant data should only be disclosed if explicit consent is obtained via a mandate.

No automatic logging in tenant records – enquiries from elected members will not be logged in tenant records unless requested by the tenant.

## 4. Handling and Responding to Enquiries

Acknowledgment within 2 Working Days – a response will be sent from the Elected Members Inbox by a member of the admin team before the allocating to the designated member of staff.

Assigning the relevant team: The Senior Governance & Compliance Officer will allocate the enquiry to the appropriate department.

Response Timeframes - full response within 10 working days, or an interim update if more time is needed.

Escalation Process – unresolved issues will be escalated to the relevant Director or CEO.

## 5. Following Up on Issues Raised

Tracking & Reporting Progress – all enquiries will be tracked using the Elected Members Register.

Formal Reporting – quarterly reports will be provided to the Executive Team, and 6 monthly reports will be provided to the Management Committee.

## 6. Meetings & Site Visits with Elected Members

Pre-arranged meetings only – requests should be submitted with a clear agenda to the CEO or in their absence a member of the Executive Team.

Executive Team Representation – the CEO or a Director must attend meetings on governance or policy matters.

Site Visit Protocol – visits should be pre-approved, and no tenant data disclosed without consent.

## 7. Public & Media Engagement

No unauthorised public statements – staff should not make public statements without CEO approval.

Political Neutrality – OTHA must remain politically neutral in all interactions.

## 8. Review & Continuous Improvement

Annual Protocol Review - the protocol will be reviewed annually to align with any legislative and regulatory changes.

Staff Training – relevant staff will receive training on this protocol.

Stakeholder Feedback – feedback will be sought periodically to improve the process.