

Housing Scrutiny Panel (HSP)
Scrutiny Report
New Tenant Visits



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Glossary/Acronyms

AHA	Assistant Housing Advisor
BCC	Bristol City Council
EMS	Estate Management Service
HSP/SIT	Housing Scrutiny Panel Project/Service Inspection Team
TPT	Tenant Participation Team
TSA	Tenant Services Authority
Voids	Empty Council Properties
Relet Standard	The standard a property is at when rented to new tenant

1. About the Housing Scrutiny Panel

What is the Housing Scrutiny Panel (HSP)?

We are a diverse group of tenants and leaseholders whose role is to take a closer look at Landlord Services. We come from all over the city, live in all types of council property and some of us have worked with the Council in the past to help make services better. Between us we have a wealth of life experience and an interest in helping Landlord Services improve the services to its tenants and leaseholders.

The scrutiny, inspection and monitoring of services by tenants is recognised as good practice for landlords wishing to improve their services and ensure standards are being met. There are a number of ways this can take place of which, the Housing Scrutiny Panel (HSP) is one.

The work of the panel

We will be taking an in-depth look at the various services provided by Landlord Services in running and maintaining its homes and services. The panel will take a positive critical view and assess the performance against local and national standards. If we find any failings we will make recommendations for improvement. Working in this way can help improve BCC performance as well as increase tenant satisfaction and involvement.

2. Acknowledgements

The Housing Scrutiny Panel would like to thank all Bristol City Council staff, independent trainers and tenants who were involved in this scrutiny process.

We would like to express our gratitude to the Tenant Participation Team (TPT) and the Performance Improvement Team (PIT) that supported us through this process.

The panel would like to thank the Service Inspection Team (SIT) for all there help with this project.

3. Introduction

This report details the findings of the Housing Scrutiny Panel project to review the Councils six-week new tenant visit.

This is a tenant-led project. The aim of the project was to review current performance and quality of service and make recommendations for improvement in terms of improving both the tenant experience and performance against targets.

The Housing Scrutiny Panel assessed data and information, supplied by the Performance Improvement Team (PIT), Estate Management Service (EMS) and from a tenant questionnaire carried out by the Service Inspection Team (SIT).

The report outlines the panel's findings and conclusions and goes on to make recommendations to Landlord Services about how the new tenant experience, specifically the new tenant visit, can be improved.

4. The Estate Management Service

The Estate Management Service require all new council tenants to have a personal visit, to make sure they have settled well into their homes.

The visit is intended to reach all new tenants six weeks after the start of their new tenancy. (This service is not applicable to transfers and mutual exchanges).

The target for new tenant visits is **95% of new tenants visited within 6 weeks**. Performance reports over the last 12 months indicate that this target is not being met and performance is currently at 75%.

5. Methodology

To scrutinise the Estate Management Service, the panel adopted the following approach:

- Identifying the service area to be scrutinised
- Developing an outline project plan
- Identifying the resources, time-scales and training needed
- Carrying out the project
- Reality checks, discussing findings and producing a final report.

The panel agreed upon 3 methods of inspection. These were:

- Taking an in-depth look at current performance, policies and procedures
- Interviewing tenants
- Interviewing Estate Management staff

6. Project Time Table

Housing Scrutiny Panel agreed a detailed plan for carrying out this project. The time table included:

- Planning meetings
- Dates for interviews with key individuals
- Time for researching documents relating to the six week visit
- A date to complete the final report on the findings.

How the timetable looked in the end.

Meeting Dates	Milestones
February	HSP Meeting.
February	Evidence received and allocated to HSP members.
March	HSP meeting to discuss findings of the evidence.
March	HSP interviews with Managers and staff.
March	SIT Questionnaire received back collated.
March	Report writing, comments and recommendations
April	Agree final report.

7. Research Undertaken

HSP researched a number of key documents as part of a table top review. The performance data and statistics made available were:

- Landlord Service Performance Reports
- Landlord Service Standards
- New Tenants Information Pack
- The new tenant survey results 2011- 2013
- STAR Tenant Satisfaction Survey results 2012
- Fair Comment Complaints report 2012
- New tenant process and supported tenant process
- Demographics of new tenants
- Assistant Housing Advisor job descriptions
- Team performance information for the past 2011-2013

The panel also interviewed Estate Management staff and commissioned the Service Inspection Team (SIT) to interview new tenants who were recorded as having received a 6 week visit.

8. Overall Findings

8.1 The new tenant visit procedures

New tenant visits are carried out by 22 Assistant Housing Advisors across the Estate Management Service. This work constitutes 10% of their job description and workload.

The aim of the new tenant visit is to:

- Complete a tenancy audit form
- Check the tenant has moved in (including asking for identification)
- Complete a visual check of the property
- Ask the tenant how they are getting on and whether they are coping well with their new tenancy
- Take any follow up action
- Record and update tenant records

Each Assistant Housing Advisor is allocated an average 90 minutes to complete a successful visit, including travelling time.

The service makes two attempts at trying to organise a visit with a tenant. If after the second occasion, contact has not been made an 'abandoned property' procedure is triggered.

In addition to the new tenant visits from the estate management team, the following teams also make contact with new tenants prior to the 6 week visit:

- Voids Team
- Rent Management Service
- Repairs and Maintenance Surveyor
- Care taking services (If applicable)

A new tenant can be visited by as many as 5 different people (more if there are ongoing repairs) at the start of their new tenancy.

8.2 Forms and documents

The following forms and documents are used by the estate management team:

- **Tenancy Audit Form**
- **Voids support needs (Sign up care form)**

The **tenancy audit form** is a lengthy form. Both HSP and staff interviewed agreed that the form was not user friendly. It appeared to be designed for the tenant to complete themselves with additional sections added to the form for officer use. The new tenant visit questions appear to be a 'bolt on' to an existing form and staff said the form did not pick up on 'key' questions for new tenants.

AHA's said that in addition to the tenancy audit form, they also carried information about the local area and support agencies with them to the NTV. This helped them to tailor their advice to the tenants needs and offer a more local focus.

A **sign up care form** is used to record tenants support needs when the tenants signs for the property. This is particularly helpful in identifying vulnerable tenants who may require additional support or advice with their new tenancy.

Relevant support needs are reported to the EM supervisor for follow up and/or to make a referral to the housing support register. This important information about new tenants is gathered from the IT system together with any other information officers need to know. However, AHAs do not routinely check the sign up care forms and are more reliant on tenant lists and informal conversations with supervisors about vulnerable tenants.

The role of the senior housing advisor (not interviewed as part of the project) within the new tenant process was unclear.

A **tenancy information pack** is also supplied to the tenant when they sign for the property. The panel liked the idea of a tenant information pack, however found the content complicated with no logical order. Information about the new tenant visit

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was hidden in a leaflet called “Moving into the home” and contained only two paragraphs.

The panel also found the content of the information pack to be inconsistent. Some packs had leaflets missing. The panel felt strongly that information relating to the new tenant visit should be more prominent in the pack and accompanied by a covering letter.

Overall, visiting officers interviewed appeared motivated and all had good ideas about how the NTV can be improved and what needs to be done to improve the supporting documents.

8.3 Performance

Team performance – visits showing as completed **within** 6 weeks (Target = 95%)

	2011-12		2012-13		Trend
	New tenants (No or Properties)	% completed	New tenants (No of Properties)	% completed	
Total	1802	83%	1397	83%	
Easton	328	94%	313	100%	↑
Fishponds	201	63%	107	66%	↑
Southmead	498	81%	368	91%	↑
Hartcliffe	440	81%	372	63%	↓
Knowle	335	77%	237	75%	↓

The highest performing teams were Easton and Southmead respectively. The Fishponds team showed the poorest performance and appear to be a significant contributor to the overall under performance of the service.

138 / 165 visits overall not completed in 2011-12

127 / 140 visits overall not completed in 2012-13

Staff shortages appear to be the main reason given by all staff interviewed.

The panel asked about sharing of staff across teams, according to workload. It was generally agreed to be possible, but has rarely happened with regards to new tenant visits. The EM Service manager said that moving between teams does happen. However, staff felt that though useful, this is not always achievable, because teams do not like to lose staff and consider it best practice to be familiar with the patch and the tenants they serve.

All staff interviewed shared that NTVs are often the first thing to go when other work priorities come up.

8.4 Record Keeping and communication

The panel found record keeping being consistent across the teams. However it noted that visits were being recorded as completed in instances where there had been failed attempts arrange / attend a visit with a tenant. This means that in some cases, visits are falsely showing as completed, meanwhile the housing advisor could be launching an 'abandoned property' investigation because they have been unable to make contact with the tenant.

When it came to sharing information about vulnerable tenants, there appeared to be a greater reliance on IT systems, tenant lists and informal verbal communication between officers rather than a standard regular meeting.

8.5 Cost

The panel identified current costs for new tenant visits to be £39,160

Workings out were based on the hourly rate for AHAs.

(22 x AHA@ £9.23 ph £9.23 x 37hours x 52 weeks = £391,644 pa 10% = £39,160 pa)

The panel discussed whether this represented best use of resources and good value for money (see conclusions).

8.6 New tenant satisfaction

Up to January 2013, all new tenants were offered a paper satisfaction survey to complete. The survey was handed to the tenant by the voids team for collection by the Estate Management Team at the 6 week visit.

	No of new tenants	New tenant surveys returned	
2011-12	1897	53	2.69%
2012-13	1539	47	3.5%

For the last two years, returns for the survey have been significantly low. However, from the tenants who responded to the survey, satisfaction indicators showed that tenants were satisfied with their new tenancy and mainly dissatisfied with state of repair, outstanding repairs and housing benefit.

Feedback about the survey from both staff and HSP was that the survey was too long and made lengthier by asking for equalities information that the service should already have.

HSP were informed as part of the project that the survey has been re-designed as follows:

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- Questions were re-designed in consultation with the Estate Management Service User Group
- The survey has been shortened to 18 questions
- The survey will be carried out by telephone to a sample of 30% of new tenants
- An external company (Voluntas) will carry out the survey and provide immediate results
- The new survey will start March 2013

There was no information provided about the cost of the new survey, however the performance improvement officer confirmed that savings made on printing and postage of a paper survey would be re-directed to fund new telephone surveys.

HSP were pleased to hear about developments with the survey and made a note to keep an eye on survey results from March 2013 onwards.

8.7 New Tenant Complaints

Landlord Services were unable to provide a comprehensive list of complaints from new tenants as complaints are not monitored by length of tenancy. They did however, provide information about complaints (from tenants) relating to the voids (re-letting) process as follows:

The service received 9 complaints overall in 2012-13. Broken down as follows:

2 x allocations, 2 x escorted viewings, 1 x re-housing policy and 2 x staff mis-information

7 / 9 complaints were resolved at stage 1 of the complaints procedure. 2 were resolved at stage 2.

9. Summary of findings from Tenant Interviews

The service inspection team interviewed 45 tenants.

- Overall the SIT team concluded that the new tenant visit service was highly thought of by tenants interviewed in the North of the city, over and above tenants from other areas.
- Most tenants found the service useful and of value.
- 32% of tenants reported not having a visit, yet the systems showed that a visit had been done.
- Those who received a visit earlier than 6 weeks had higher satisfaction levels.
- Areas for improvement highlighted were:
 - Addressing outstanding repairs. This issue significantly influenced satisfaction levels of those interviewed.
 - Communication – tenants reported poor communication and lack of consistency between teams. The SIT said that better communication and co-ordination was needed.

10. Conclusions & Final statement

It is widely agreed that first impressions are most important in any relationship. A good tenant / landlord relationship is essential to maintaining tenancies and giving people a great start in their new home. After sign up, the new tenant visit is the real chance to cement the landlord / tenant relationship.

The panel concludes that if all are working together towards letting out properties that are of a high standard, this would result in clean properties in a good state of repair, before the tenants move in. This should improve the new tenants experience considerably and may also lead to tenants taking pride in their new homes.

In terms of new tenant visits, the HSP's view is that elements of the NTV are working well, for example, the good practice shown in the North of the city and in terms of the additional local information provided to by AHA's.

However the panel concluded that the NTV service needs further improvement as summarised below.

- Whilst individual teams are working hard to respond to their respective part of the new tenant process, departments are not working together to meet tenant needs. The service needs to be more inter-connected, offering a more joined up approach from the teams involved in the new tenant process.
- There should be more effective data / information gathering between teams to a) support and better reflect the achievement of targets; and b) to better respond to the needs of vulnerable people.
- New tenants should feel as if they are being supported by a single service, knowing what to expect and who to contact if they need support.
- New tenancies should be handed over to tenants with a better relet standard as this heavily influences satisfaction levels.
- Good practice from within the service should be shared and the service could extend this to looking at best practice from other local authorities.
- Savings of up to £3k could be made by deploying just 2 AHAs (North and South) to deal with new tenant visits. However the panel also felt that a specialist team for NTV would be of greater benefit longer term.
- HSP welcome the change of approach with regards to the new tenant satisfaction survey to telephone rather than postal or face to face. This was consistent with SIT findings that telephone responses are more successful.

Appendix a: Recommendations

Opening comments from the Housing Scrutiny Panel

The new tenant process is clear and informative. The panel would like to commend the AHA's and Supervisors interviewed who seemed to be highly motivated and resourceful individuals often going the extra mile in terms of supplying new tenants with local information about the area. The panel also welcome future results of the new tenant satisfaction survey.

Recommendations

HSP Recommendations	Estate Management Service Response	Who is responsible?	By When?
Procedures			
1) Consult with AHA's and visiting officers about service improvements including changes to tenancy audit forms.			
2) Continue with provision of local information to new tenants.			
3) Clarify the role of SHA (with AHA) and how NTV are monitored as part of the AHA performance review.			
4) Improve procedures for sharing information about vulnerable tenants.			
5) New training should be introduced for AHAs and SHAs in customer service and service standards for new tenant visits in order to have a consistent service delivered across the board.			

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HSP Recommendations	Estate Management Service Response	Who is responsible?	By When?
Forms and documents			
6) Make better use of the sign up care form on a routine basis, before going on a new tenant visit.			
7) Make changes to the tenancy audit form. The form needs to be more user friendly for officers to use and serve as a guide to enable the officer to ask relevant questions.			
<p>8) Standardise the Tenant Information Pack and include specific information relevant to the property. Make the information about the new tenant visit more prominent so as to alert the tenant how the visit is used and how it can help them. The following information should be included:</p> <ul style="list-style-type: none"> ▪ A covering letter should be included which contains a list of telephone numbers the date of the new tenant visit and ending with 'more information can be found in your pack'. ▪ Advice that the 6 week visit is compulsory ▪ Contact details of the person who will be visiting ▪ Emergency and important numbers ▪ Latest copy of Housing News magazine ▪ A checklist for tenants to get settled into their new home ▪ A list of contents 			
9) Improve the leaflet "moving into the home"			

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HSP Recommendations	Estate Management Service Response	Who is responsible?	By When?
Addressing under performance of current teams			
10) As a priority take steps to find out reasons for apparent under-performance of the Fishponds and Hartcliffe teams and take action.			
11) As a priority address resources within and across teams with a view to prioritising staff who will focus on the start of tenancy process. For example:			
<ul style="list-style-type: none"> ▪ Short term – use existing resources better. Re-organise staff to enable better and more effective management of new tenancies. Including the option of moving staff within the service as necessary to address the under performance in Fisphonds and Hartcliffe areas. 			
<ul style="list-style-type: none"> ▪ Monitor the workload and deploy staff as needed to address peaks and troughs in workloads. This may enhance inter team working, skills transfer and sharing of good practice. 			
<ul style="list-style-type: none"> ▪ Medium term - recruit within the next 6 months and consider employing a pool of local people who can assist with undertaking new tenant visits. Train up young people / Apprenticeships to help the shortfall in staff. 			
<ul style="list-style-type: none"> ▪ Longer term – Consider allocation of 2 x AHA officers to specifically focus on new tenant visits citywide resulting in a saving of approximately £3,566k per annum. ▪ Consider apprenticeships at AHA level to help manage workloads whilst providing real work experience for younger people. 			

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HSP Recommendations	Estate Management Service Response	Who is responsible?	By When?
<ul style="list-style-type: none"> ▪ Set up a new team (or an extension of the Tenant Participation Team) to incorporate all services i.e. Tenant visits, data gathering, statistic and other services that happen for new tenants. ▪ Create a bank of staff that allows for older people, who are flexible, Have a proven record, good work ethic, which have had to take early retirement but are still willing and have a lot to offer the community. 			
Record keeping & communication			
12) Improve record keeping for improved accuracy and consistency.			
13) Ensure there is a clear distinction between completed and failed or aborted visits.			
14) Improve communication and interface between teams. For example, co-locate teams who deal with new tenants or identify leads within each service to respond to new tenants.			
15) Make use of new technology. This will save money in the longer term (postage and stationary costs) and allow immediate access to information when on site as well as improved communication with supervisors.			
16) Hold regular (point of contact) meetings between the teams involved in new tenant process e.g. voids, repairs and EM supervisor. Particularly for vulnerable tenants (See 4 above).			

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HSP Recommendations	Estate Management Service Response	Who is responsible?	By When?
Making better use of resources			
17) Extend service hours to allow for tenants at work during day time hours.			
18) Recognising housing need and higher need for support. The service should consider extended support services to meet the needs of vulnerable people.			
19) Review target of 95% in light of implementing HSP recommendations. For example: Year 1: 95% year 2: 97%			
Other			
20) Prioritise full review of relet standard and process for dealing promptly with outstanding repairs in consultation with the repairs and maintenance service, EM Supervisor, user groups and new tenants.			

The Housing Scrutiny Panel also support the following recommendations made by the Service Inspection Team (some of which are consistent with HSP recommendations).

1. Letters (and other communications) advising of the visit and offering timeslots should state that the visit is compulsory/mandatory.
2. New Tenants should be offered timeslots (as per Responsive Repairs).
3. The six-week period prior to a visit taking place should be shortened to four.
4. How the data on completed NTVs is collected should be reviewed to better reflect the high incidence of non-completions.
5. Variations in sign-up process may enable resolution of repairs issues earlier and lead to an improved introduction to the new property for the new tenant; i.e sign-up in property, sign-ups by surveyors.
6. Identify good practice in specific Estate Management Teams and export this to other teams

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7. Improved training (Customer Services, Vulnerability), and additional resources would support staff involved
8. Utilise modern communications (text, e-mail etc) with appointments

Appendix b: Team performance 2011-13

Team performance – visits showing as completed **within** 6 weeks (Target = 95%)

	2011-12		2012-13		Trend
	New tenants (No or Properties)	% completed	New tenants (No of Properties)	% completed	
Total	1802	83%	1397	83%	
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Southmead	498	81%	368	91%	↑
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Knowle	335	77%	237	75%	↓

Team performance – visits showing as completed **outside** of target (later than 6 weeks)

	2011-12		2012-13	
	Properties	% complete	Properties	% complete
Totals	1802	17%	1397	17%
Easton	328	5%	313	0%
Fishponds	201	37%	107	34%
Southmead	498	19%	368	8%
Hartcliffe	440	19%	372	37%
Knowle	335	8%	237	12%

Number of New Tenant Visits **not completed at all**

	2011-12	2012-13
Totals	165	140
Easton	2	0
Fishponds	138	127
Southmead	9	1
Hartcliffe	1	0
Knowle	15	12