

Orion Programme

Summary Report on the Peer Review for Allocations and Lettings

April 2010

The process

- 1 The peer review for Allocations and Lettings is the first carried out in Sovereign Group. The staff selected to form the team included a Lead from outside of the Allocations service, and three staff who currently work in Allocations services within the Associations. Training on inspection techniques was delivered to both staff and residents by an external consultant.
- 2 As the fourth subsidiary Association, Sovereign Kingfisher, joined the Group in July 2009, their service was not considered in this review.
- 3 The process of peer reviewing is:
 - Form the team and provide training
 - Provide documents relating to the service (including performance information, policies, procedures, complaints, etc.) to all team members
 - Team meets to discuss focus for the review at each Association
 - Team divides into sub-teams to carry out site visits to each Association
 - Team meets to discuss findings and agree recommendations
 - Report produced for managers and the Group Residents Forum.
- 4 All staff contacted during the process of this review proved welcoming, helpful and accommodating, and the review team would like to express their thanks to those staff for allowing them to carry out their activities efficiently and unhindered.

The results

Sovereign South+West (Newbury)

- 5 A specialist Allocations team (Re-Housing) operates from the Newbury office, and comprises a manager supported by three full-time members of staff. Approximately 6,100 properties are managed from Newbury. In 2008-09, 490 General Needs properties were let or re-let with an average re-let time of 3.5 weeks.
- 6 There is evidence that the service provided by the Newbury team is generally of a good quality. The staff are positive and deliver a good level of customer service. Communications to applicants are delivered in a professional way, and are largely comprehensive, although there are areas where this standard can drop, e.g. the Empty Homes Standard is not always communicated in full. There is a tendency to duplicate the collection of information from applicants at different stages.
- 7 The pre-tenancy activities carried out by the Association are good, but staff intend to improve this further by carrying out more work on helping applicants understand how much they can realistically afford to spend on rent.
- 8 The relationship with the Property Services team on managing empty properties is productive, and the processes are reasonably efficient. Efforts to reduce the time properties remain vacant are in place and working, but could be refined more. The delayed production of the Empty Homes Standard leaflet for residents is an issue.
- 9 The service lacks any significant resident involvement, and although complaints are low they do show recurrent themes, suggesting that learning opportunities and service improvements are not always addressed. Improved collection of resident profiling data has begun, but to date without impact on services.

10 Strengths

- Good relationship developed between Allocations team and Property Services
- Good knowledge and use of pre-tenancy assessment work
- Signposting and advice given on debt and other support issues
- Viewings carried out throughout the void period
- Maintenance staff are proactive on 'adding value' and work to clear timescales
- Good style of written communications to residents, including a well-presented residents' handbook
- Low numbers of complaints
- Improved collection of residents' profiling data.

11 Weaknesses

- Lettings policy out of date, procedures need tidying
- Local Lettings Plans not being reviewed to timescale nor actively managed
- Some paperwork needs to be streamlined, too much duplication
- Poor understanding and communication of the Empty Homes Standard
- Poor resident involvement in shaping service delivery

- No evidence of consistent service improvements following complaints
- No use as yet of profiling data to influence services.

Sovereign South+West (Plymouth)

- 12 The Plymouth office provides a generic service to local residents, comprising a Manager, one Senior Housing Officer and two Housing Officers. There are approximately 880 properties. In 2008-09, 100 properties were let or re-let, with an average re-let time of 3.7 weeks.
- 13 The delivery by the Plymouth team is good overall, with an emphasis on the local, personalised service which is highly valued by residents. Levels of customer care are generally high, despite the lack of an accessible office location, and the quality of information given to applicants is good. A good network of contacts with local agencies is used to assist with pre-tenancy work, but the late construction of support plans lets down the service.
- 14 There is a need for better work between Property Services and Housing teams on managing empty properties. The variable communication of the Empty Homes Standard to applicants demonstrates uncertainty from staff on what it covers, yet resident satisfaction with their homes is high, helped in part by efficient viewings and the quick turnaround of re-lets.
- 15 Resident involvement is delivered via individual officers working closely with residents on their patches; staff feel that demand for further engagement should be dictated by residents, not imposed from the Association. Profiling data is not yet being used to shape the service.

16 Strengths

- Proactive, problem-solving staff
- Local Lettings Plans are in place and reviewed annually
- Officers deliver residents a more personalised service
- Good liaison work with other agencies on pre-tenancy work and debt support
- Viewings held early in the void process
- Re-lets occur within 24hrs of handover
- Applicants with debt issues must agree to support plan before being offered a tenancy
- Well-presented residents' handbook
- Improved collection of residents' profiling data.

17 Weaknesses

- Housing staff not challenging enough with Property Services
- Policy out of date, and no evidence of resident involvement in policies and procedures
- Poor understanding and communication of the Empty Homes Standard
- Support plans drawn up late
- No resident involvement action plan
- Handbook not tailored to local area

- No use as yet of profiling data to influence services.

Sovereign Twynham (Christchurch)

- 18 A specialist Allocations team covers Sovereign Twynham, and is managed by a Senior Allocations Officer, supported by two part-time members of staff plus a part time Visiting Officer. Approximately 3,290 properties are managed by Sovereign Twynham, including 1,040 on behalf of Sovereign South+West. In 2008-09, 159 properties were let or re-let, with an average re-let time of 5.4 weeks, however it is reported that delays occurred with nominations from the Local Authority due to staff shortages, and this adversely impacted the Twynham performance figure.
- 19 Whilst levels of customer care are good and staff are dedicated and hard-working, the service provided by the Twynham team is under-developed and not well resourced. Policies and procedures are of a very good standard, but are not supported well enough by information management and analysis of performance, both of which are in real need of attention. The employment of a Visiting Officer to assist with pre-tenancy work is a good step, but this is a temporary post with no method in place to measure its impact. More work is needed to provide added-value support to new applicants such as advice and signposting on debt.
- 20 There are issues relating to information sharing between Property Services and Allocations staff. The Association has carried out good work in involving residents in both determining and inspecting the empty property standard, however there is inconsistent awareness from staff on the detail of the standard, and so communications to residents can be variable.
- 21 Levels of resident involvement in the service are low, and there is no current engagement strategy in place or under development to help address this. There is excellent work taking place in the Association to collect high levels of residents' profiling data, but this has yet to filter down into influencing services.

22 Strengths

- Positive attitude and good levels of customer service from staff
- Clear aims and objectives in the policy, including dates for creation and revision
- Visiting Officer post employed to assist on pre-tenancy work
- Links to Citizens' Advice Bureau (CAB) for debt advice
- Residents involved in setting and monitoring void standard
- Good range of information provided to residents at sign-up
- Settling-in visits booked at sign-up
- Resident handbook in useful folder format
- Collecting high levels of resident profiling data.

23 Weaknesses

- Small team; lacks influence and clear targets for delivery
- Information not managed centrally nor shared with all stakeholders
- Allocations team not establishing client role with Property Services
- No hard-to-let strategy or plans

- Pre-tenancy work under-developed, and no work on affordability
- Applicants not allowed to view during works on empty properties
- Poor understanding and communication of the empty property standard, and no evidence that the standard is being consistently applied
- Poor re-let times
- Questionable value for money of resident handbook format
- Not currently using resident profiling data to influence services.

Sovereign Vale (Abingdon)

24 The Allocations service in the Abingdon area is delivered by generic staff within the Housing team. Six Housing Officers are managed by an Area Housing Manager who reports to the Housing Manager. Approximately 6,250 properties are managed by Sovereign Vale. In 2008-09, 420 properties were let or re-let, with an average re-let time of 3.2 weeks.

25 The service delivered at Abingdon is of variable quality; operational staff are experienced, customer-focused and keen to deliver a good service, but this effect is hampered by policies and processes overdue for review. There is no formal approach to pre-tenancy work in the service, and no strategy for improving this, beyond the appointment of the Tenancy Support Officer. Promotion of debt advice and signposting was not considered a priority, but otherwise good, comprehensive information is given to applicants throughout the lettings process.

26 Whilst re-let times are good, these could be further reduced by allowing viewings earlier in the process. Housing do not appear to influence the empty property period, and defer to Property Services, demonstrating a lack of coordination between the two departments. The empty property standard is excellent, with extra works carried out in empty homes. The only criticism here would be that the high standards are not being communicated more widely and accurately to applicants. Staff appear engaged and work on their own initiative with regard to resident involvement in the service, but this means that delivery is not always consistent.

27 Strengths

- 'Local' service provided to residents, gives high levels of customer satisfaction
- Mission statement included in policy places emphasis on residents
- Good links to Vale of White Horse District Council
- Tenancy Support post in place to assist with pre-tenancy work
- Good accompanied viewings process
- Very high empty property standard, showing excellent customer focus
- Officers engaged with resident involvement on a personal level
- Good range of information provided at sign-up.

28 Weaknesses

- Processes not streamlined and overdue for renewal
- Information management not robust

- Policy overcomplicated and difficult to read, undated
- No hard-to-let strategy or plans in place
- No formal approach to pre-tenancy assessment and low levels of work on affordability
- No advice or signposting on debt; handbook lacks detail on debt advice and other support
- Housing team not establishing client role with Property Services
- Poor understanding and communication of the empty property standard.

The Peer Review Team

The team for this review comprised equal numbers of staff and residents, supported by the Orion Project Manager and Assistant.

Lead Inspector: Karen Blatchley – Business Support Manager – Sovereign Vale

Subject specialists: Angela Gibson – Re-Housing Manager – Sovereign South+West
James Rippin – Area Housing Manager – Sovereign Vale
Maddie Parr – Senior Allocations Officer – Sovereign Twynham

Resident Inspectors: Jonathan Hewitt – Sovereign Vale resident
Graham Lillington – Sovereign South+West resident
Brian Edmonds – Sovereign Vale resident
Chris Holliday – Sovereign Vale resident

External validation: Sheila Adamson, HQN Consultant and Audit Commission inspector

The peer review took place during September and October 2009.

This report contains the findings of the peer review team, using the evidence gathered from interviews with managers, staff and residents (service users and involved residents); mystery shopping; visits to properties; shadowing staff during routine activities; and documentation reviews and checks.

What are we doing to improve?

Actions – for all Associations	Timescale
Carry out work to see if it would be viable and give value for money to offer services to residents on best value tariffs for utilities and home insurance.	Dec 10
Produce new sign-up packs for residents, ensuring that they are up-to-date, consistent across the group, included added-value topics (e.g. debt advice), and cater to the needs to local residents.	Sep 10
Develop staff skills on debt advice and support, including interviewing skills and on widening access to employment. Agree suitable Service Level Agreements with specialist agencies to fill gaps.	Oct 10
Provide advice and training to managers and service leads on determining and monitoring levels of value for money in their operational areas.	tbc
Begin using residents' demographic profiling data to influence service delivery and priorities.	Jul 10
Ensure that the review of all Allocations policies is treated as a priority, and that the resulting work is tailored to local areas as well as overarching group-wide themes.	Sep 10
Widen resident engagement with the service, including better methods of responding to resident feedback and evidencing how their involvement has made a difference.	Mar 10

Actions – for Sovereign South+West	Timescale
Actively use feedback from customer complaints and satisfaction surveys to drive service improvements.	Apr 10
Work with Local Authorities to provide Choice Based Lettings applicants with sufficient information and support to guide them through the process.	Jul 10
Improve the system for creating and managing Local Lettings Plans.	Oct 10
Extend the levels of work around determining applicants' affordability levels, and ensure links are included within the	Oct 10

Association's Financial Inclusion strategy.	
Streamline pre-tenancy and sign-up forms to reduce duplication and improve the experience for residents.	Oct 10
Review and publish the planned Empty Homes Standard, ensuring that it is clear for both staff and residents.	July 10
Make use of the Training & Employment Links Officer within the Association to provide advice to applicants and other residents on employment opportunities.	July 10
Provide staff with information on performance and customer feedback, and encourage them to use this to influence their work.	Oct 10
Ensure support plans are drawn up and in place before tenancies commence.	Oct 10
Take on a more defined client role with regard to the management of empty properties, and further develop the relationship with Property Services in this regard.	tbc

Actions – Sovereign Twynham	Timescale
Develop a Financial Inclusion strategy to link in with Group-wide recommendation on debt support and access to employment.	Jul 10
Make better use of IT resources to manage information and give access to all those who need it.	Jul 10
Take on a more defined and assertive client role with regard to the management of empty properties, and further develop the relationship with Property Services in this regard.	Apr 10
Review the current resource allocation for the service, and establish better cover for periods of staff absence to ensure consistent and timely delivery to customers.	Sept 10
Implement changes that encourage managers and staff to have a greater awareness of performance data and resident feedback, to understand how to utilise the information to improve services.	Apr 10
Develop a strategy and short term plan for dealing with hard-to-let properties.	Sept 10
Streamline all forms to reduce duplication and improve the experience for residents.	Oct 10
Establish measurable success criteria for the Visiting Officer post and monitor appropriately.	May 10

Publish an updated, comprehensive and transparent empty property standard to both staff and residents, and provide training for staff on the standard.	Apr 10
Tighten up the decoration voucher allowance process, and publish clear guidelines for staff and residents on when it applies and the amounts to be allocated.	Apr 10

Actions – Sovereign Vale	Timescale
Develop a Financial Inclusion strategy to link in with Group-wide recommendation on debt support and access to employment.	Sep 10
Implement changes that encourage staff to have a greater awareness of performance data and resident feedback, and how to utilise the information to improve services.	Jun 10
Reduce the reliance on numerous locally-produced spreadsheets and make better use of IT resources to manage information.	Dec 10
Produce a strategy and action plan for dealing with hard-to-let properties.	Feb 10
Commit to more robust pre-tenancy work, including adoption of a consistent approach to calculating applicants' affordability.	Apr 10
Establish routine use of tenancy audits.	Apr 10
Take on a more defined and assertive client role with regard to the management of empty properties, and further develop the relationship with Property Services in this regard.	Mar 10
Publish an updated, comprehensive and transparent empty property standard to both staff and residents, and provide training for staff on the standard.	Mar 10
Communicate successes in achieving low turnaround time of empty properties with colleagues within the Group as an example of best practice.	Apr 10