

**14<sup>th</sup> Annual Resident Involvement Conference**  
**5<sup>th</sup> and 6<sup>th</sup> June 2014**  
**Hilton Hotel Blackpool**

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## **Residential Delegates Important Information**

### **Check In – Thursday, 5<sup>th</sup> June 2014**

- If you are a residential delegate your room has been booked and confirmed in advance.
- Check in is from 3pm, however some rooms may be available earlier than this, although it is not guaranteed.
- Check in is advised to take place during lunch or refreshment breaks to ensure smooth running of the conference.
- Luggage storage is available until your room is ready, please contact the hotel reception.

### **Check Out – Friday, 6<sup>th</sup> June 2014**

- All rooms must be vacated and keys handed back to reception by 11am.
- Please check out before the conference commences at **10.00am**.
- Where possible please use the Express Check Out facility, to qualify for this you must provide the hotel with credit card details on check-in – there are signs at registration and reception detailing further information on the express check-out facility.:
  - If there is nothing to settle on your bill all you need do is drop your room key in at reception.
  - If there is something to settle and you agree with the bill please complete the back of your key card and drop into reception with your room key.
- Luggage storage is available until your departure from the hotel, please contact the hotel reception.



**14th Annual Resident Involvement Conference  
Achieving value for customers and landlords**

**5th & 6th June 2014 - Hilton Hotel Blackpool**

**Programme**

**DAY 1**

**10.00 Registration, refreshments and exhibition viewing**

**11.00 Chair's Introduction and welcome**

**Nigel Wilson**, Chief Executive, Wythenshawe Community Housing Group  
**Irene Bailey**, Tenant and Board Chair, Preston Community Gateway

**11.10 Keynote speakers: What is all this fuss about Value for Money?**

**What is expected and what is it about – a view from the regulator**

**Graeme Foster**, Strategic Regulation Manager, Homes and Communities Agency

Graeme will confirm the regulatory requirements for boards, staff and tenants and give the Homes and Communities Agency perspective on:

- the value for money statements submitted by landlords in 2013, and
- where improvements are required in future

**What can be achieved by landlords and how could residents be involved?**

**Tony Bryan**, Managing Director, Vantage Business Solutions

**Jon Mallen-Beadle**, Managing Director, Gateshead Housing Company

Tony will explain the work he undertakes with landlords to investigate the opportunities for significant budgetary savings and give examples of what has been achieved by landlords striving for value for money, including:

- repair service transformation
- housing management and improvements in satisfaction

Jon will explain the approach to Value for Money (VfM) at the Gateshead Housing Company, including:

- the impressive savings achieved in the major works programme
- how they achieved this
- how residents have been engaged in achieving those savings

**12.00 Question Time Panel: Achieving value for money**

Graeme, Tony and Jon will take questions from the audience

**12.20 Lunch and exhibition viewing**

**1.35 Theatre Performance: One Family's Story**

This drama piece concerns two members of the same family caught up in a spiral of debt. There is nothing unusual about the way the family live: they have similar lifestyles to those of us in the wider community. We see the likely outcome of this situation if neither character addresses the problem.

Shontal are a not for profit organisation that specialises in 'Financial Literacy using Live Theatre'. Working across the community, their aim is debt prevention through education.

## **2.40 Workshops: session 1**

### **1. Encouraging tenants to go on-line and get the best deals**

**Dean Slavin**, Customer Involvement Manager, Wythenshawe Community Housing Group (WCHG) and Ben Harrison

For a significant minority of people, the lack of online access and the essential skills needed to use online services means that they are not only missing opportunities to use online services, but are becoming disproportionately disadvantaged and excluded as digital becomes more integral to the majority experience of everyday life. This session will explain:

- How they are helping residents enjoy the benefits of the internet by providing a new computer recycling service, access to affordable computer equipment and connectivity.
- How they are supporting digital inclusion through computer skills courses.
- How residents have been involved in shaping and delivering as digital champions.
- How these digital champions have been involved in providing peer support for their fellow tenants.
- How 'Get Online Wythenshawe' is designed to support access to online services such as Welfare Benefits, the Housing Register, employment opportunities, getting the best energy deals and many more everyday services

### **2. Achieving positive engagement with hard to reach groups**

**Tracy Jagger**, Senior Corporate Services Officer, Habinteg  
**Stewart Barnes**, Occupational Therapist, Habinteg

Habinteg have over 40 years' experience in neighbourhoods allowing everyone to live independently, whatever their age, impairment or cultural background. They remove barriers to enable wider participation, and will explain:

- How Habinteg make adjustments to enable tenants with differing needs take part in involvement activities through:
  - i) Flexible travel and accommodation arrangements
  - ii) Always endeavouring to accommodate differing needs
  - iii) Making use of in-house occupational Therapy provision
- How they make provision for carers and assistants

### **3. Engaging young people through Know your Money**

**Susan Borrow**, Project Manager, Erimus Housing  
**Khialah Wilson**, Engagement Officer, Erimus Housing  
**Nathan Henderson**, Volunteer

Erimus Housing will explain their exciting "Know Your Money - Keep The Change" - KYM project. KYM is a Big Lottery funded project in Middlesbrough. The project works with young people aged 16-24 in social housing (and in other housing sectors too) to improve their financial confidence. The project opened in August 2013 and has had

great success, engaging and supporting more than 800 young people in its first 8 months of operation. They will explain:

- Methods used to involve and engage young people
- Encouraging and enabling young people to shape and deliver services/activities/events
- The use of live performances, creative workshops and training
- Partnership working and the provision of incentives supported by partners
- Thinking outside the box - hints and tips for engaging young people

#### **4. Raw Talent: enabling peer-to-peer learning**

**Andrew Wilson**, Thumbprint Cooperative

The response we can get from text messaging is instant and effective. Within seconds of sending out a message the phones start ringing. It is a good way to infill workshops at the last minute and also a way to inform our clients of opportunities that need to be urgently filled. This hands-on workshop looks at how voluntary groups and housing organisations can use text messages to connect with people, reduce isolation, grow social capital and boost wellbeing and resilience. This session will explore:

- Case study examples, looking at the tools used
- Generating ideas and outlines for using text messages

#### **5. Customers giving energy advice to alleviate fuel poverty**

**Antony Jarvis**, Social Responsibility Co-ordinator and a resident of Knowsley Housing Trust (KHT) and **Jennifer Gore**, Volunteer and local resident

KHT have led the way in tackling fuel poverty in a number of ways. In this workshop they will explain:

- How they trained apprentices to deliver energy advice in their homes, communities and online/ over the phone
- Why they use new technologies and invest in warm homes
- How they work with other landlords and local authorities through the Viridis partnership to reduce fuel poverty in Merseyside
- Why working with volunteers is essential to facilitate successful uptake of advice and technologies
- The volunteer perspective, motivations and barriers
- What can be done to support volunteers

### **3.30 Refreshments and exhibition viewing**

### **3.50 Workshops – session 2**

#### **6. Undertaking a full value for money review of customer involvement services**

**Natalie Pryor**, Customer Involvement Officer and **Sheila Fitzpatrick**, Customer from Liverpool Mutual Homes

Liverpool Mutual Homes completed a Value for Money (VfM) review of their customer involvement methods. They will explain:

- How they approached the VfM review of their service
- How they involved tenants and staff in reviewing the value of services
- The outcomes from their review
- Hints and tips for completing a value for money service review

**7. VIPs – a short intensive customer value for money service review**

**Jonathan Cannon**, Customer Involvement Officer and Jackie White, Customer from the Thirteen Group

Thirteen have experimented with tenant-led short service reviews. They will explain:

- The project and the role of VIPs
- How these reviews achieve value for money for customers involved and for the landlord
- How they engaged managers in bringing projects forward for service review
- How VIPs support the scrutiny panel
- How the project has been embraced by customers and managers alike
- Training and embedding VIP work into the heart of the partner landlords.
- Hints and tips for running your own quick project to support business critical issues

**8. Engaging young people through Know your Money**

**Repeat of session 3**

**9. Raw Talent: enabling peer-to-peer learning**

**Repeat of session 4**

**10. Customers giving energy advice to alleviate fuel poverty**

**Repeat of session 5**

**4.45 Keynote speakers: Tenant Reward Schemes – different options and approaches**

**The Orbit Community Reward Scheme**

**Gwyn Gascoigne**, Income Strategy and Operations Manager, Orbit Heart of England

Orbit looked over the water to France and the Netherlands to consider how they would reward their tenants and encourage payment of rent. Orbit will explain:

- The Orbit pro-points tenant reward programme
- How tenant reward schemes can change tenant behaviour
- Why they wanted to reward tenants
- How the scheme works
- How the scheme allows tenants to gather and spend points across a range of flexible options
- Hints and tips for developing your own reward scheme

**The Irwell Valley Diamond Service**

**Tom Manion**, Chief Executive, Irwell Valley Housing Association

Irwell Valley introduced their gold service to reward positive behaviour in tenants over ten years ago. They will explain what their latest Diamond reward scheme and cover:

- Why they wanted to reward tenants
- How the gold scheme has now gone diamond
- How the scheme works and the requirements and benefits of the reward scheme
- How tenants were engaged in the development of the scheme



- Hints and tips for developing your own reward scheme

**5.15 Question Time: Tenant Reward**

Gwyn and Tom will take questions from the audience

**5.30 Close of Day One**

**7.00 Conference dinner followed by quiz and our popular late night disco at Springs nightclub**

## **DAY 2**

**9.45 Chair's welcome**

**Nigel Wilson**, Chief Executive, Wythenshawe Community Housing Trust

**9.50 Delivering Value at the Housing Ombudsman Service - You pay for me, what do I do for you?**

**Mike Biles**, Housing Ombudsman

The Housing Ombudsman undertakes dispute resolution for landlords from the Local Authority, Housing Association and some Private Sector providers. Mike will explain:

- The role of the Ombudsman
- The strategic objectives to fulfil that role
- How the Ombudsman Service strives to remain relevant, make an impact, and adds value
- Top tips to make the Ombudsman happy

**10.20 Sub Plenary sessions:**

**Delegates can choose to attend one of two plenary sessions:**

**1. The less than wonderful world of the 'bedroom tax'**

**Ian Alderson**, Partner, Brabners LLP

Ian will discuss the recent case law, the legal challenges to the bedroom tax and what this means for tenants, including:

- The debate on what is a bedroom
- The challenges on exempt accommodation
- Challenges on disability and human rights

**2. Practical Ideas for involving customers in value for money**

**Yvonne Davies**, Director, Scrutiny and Empowerment Partners Ltd

**Kevin Haughian**, Customer, Nehemiah United Churches HA

Yvonne will discuss the practical ways landlords have involved customers, and will cover:

- Examples of different approaches taken from across the country
- Hints and tips to tenants on influencing VfM

Kevin will discuss the Nehemiah United Churches HA Customer 'Value for Money Panel', including:

- Why participating in the Panel is important to customers
- What has been achieved
- How customers influence the business priorities and spend from efficiency gains

#### **11.10 Refreshments and exhibition viewing**

#### **11.30 Let's talk about Welfare Reform**

##### **Universal Credit Pilots – lessons learnt Steve Rawson, Managing Director, WDH**

Wakefield was a pilot for Universal Credit and produced a report into the first 200 days of the 'bedroom tax'. Steve will explain:

- What WDH learnt about the implementation of the bedroom tax, its impact on tenant and the business "Life on the Edge - 200 days and counting the cost"
- How they involved their residents in planning for welfare reform
- Why WDH chose to be a pilot to implement Universal Credit
- Lessons learnt to date and advice for landlords and tenants

##### **Campaigning on Welfare reform - how can you help? Iain Sim, Chief Executive at Coast and Country Housing**

Coast and Country have led the way in supporting their tenants to campaign about issues relating to welfare reform. Iain will explain:

- Why Coast and Country have stuck their head above the parapet and campaigned against some of the elements of welfare reform
- How they support residents subject to welfare reform
- How they have worked with other North East landlords to build a voice for residents
- How they share information across landlords and tenants
- How you might replicate a similar campaign

#### **12.10 Question Time: Welfare Reform**

Ian and Steve will take questions from the audience

#### **12.25 Chair's closing remarks**

#### **12.30 Close of conference**

# Biographies

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### **Nigel Wilson**

Nigel has over 28 years' experience in the housing sector. He was a housing co-operative tenant and activist before working as a housing officer for housing associations and local councils. He worked in tenant participation and resident engagement before specialising in new business and regeneration. He is a fellow of the Chartered Institute of Housing, vice-chair of the Community Gateway Association in Preston, chair of JV North and a Board Member for FRC and chair of Wythenshawe Forum Trust.

He said: "I am delighted to have this great opportunity to lead in the building of the new group for Wythenshawe and believe it provides huge opportunities to build on the strong legacy of each partner

### **Irene Bailey**

Irene Bailey is Community Gateway Association's Chair and member of the Gateway Tenants' Committee (GTC)

As Chair, Irene is fully involved with the strategic aspects of the organisation, she is involved in planning days and Board away days, helping to shape CGA's Corporate Strategic plan.

She is also an active member of the GTC and sits on a number of tenant led action groups.

### **Graeme Foster**

As Senior Regulation Manager, Graeme leads on assessing compliance against the regulator's standards with some of the largest and most complex providers in the country.

Graeme is a member of the Institute of Housing and has a Public Service MBA from the University of Birmingham. Graeme's background includes work at the sharp end in housing management roles. He has also has experience in inspection, policy, consultancy and tenant satisfaction research.

Graeme joined the Tenant Services Authority in June 2009 as Assistant Director for Tenant Excellence where his role involved managing a team leading on raising the standards of service for tenants.

Previously, Graeme was employed as Lead Housing Inspector at the Audit Commission.

### **Tracy Jagger**

Tracy is the Senior Corporate Services Officer at Habinteg, a national housing association that champions inclusion by promoting accessible homes and

neighbourhoods that welcome and include everyone – both disabled and non-disabled tenants.

Tracy's role is predominantly focussed on promoting tenant involvement, leading on research and development opportunities for tenants and promoting new initiatives and opportunities to be involved with governance of the organisation. Tracy joined Habinteg 12 years ago from a corporate background and during her career has adapted to the changes in tenant involvement to take into account new legislation and best practice in supporting tenants to shape and scrutinise service delivery.

### **Susan Borrow**

Susan Borrow is Project Manager for the highly successful Know Your Money – Keep The Change (KYM) project in Middlesbrough. This Big Lottery funded project works with young people aged 16-24 to improve their financial confidence and also provides support with other issues too. Susan has managed KYM since January 2013 and prior to this she worked for the Local Strategic Partnership.

### **Khialah Wilson**

Khialah Wilson, aged 23, has been involved with KYM for more than 12 months as part of the project's Youth Panel. Khialah has a passion for performing and has planned and delivered events/ activities at KYM. Most recently she has been successful in applying for a Youth Engagement Worker role in the project. As part of this she has delivered events focused on fashion, to encourage young people to develop and alter their own clothing to save money.

### **Nathan Henderson**

Nathan Henderson, aged 19, became involved in KYM via a referral from the local Job Centre. Initially he carried out an eight week work experience at KYM to provide him with employability skills and also undertook training programmes associated to tenancy management, pimp my bike and job searching /applications. Nathan now volunteers at KYM on a daily basis and is also involved with our Youth Panel.

### **Jonathan Cannon**

I'm currently working as part of the Customer Involvement team with the newly-formed "Thirteen group" supporting various customer groups and projects as well as being the lead officer for Scrutiny.

Thirteen group was formed in April 2014, manages over 32,000 homes across the North and comprises;

- Erimus Housing (Middlesborough)
- Housing Hartlepool (Hartlepool)
- Tees Valley Housing (properties across the north)

- Tristar Homes (Stockton)
- 13 Care and Support (previously Norcare)

I have worked in social housing (supported and general needs) for over 18 years including operational and strategic services for homeless people, offenders, people with drug and alcohol support needs, tenancy support, sheltered housing, equality and diversity, Supporting People and customer involvement. I have also spent time as a training provider and independent consultant.

On a more personal note I live in Hartlepool, have three children and enjoy my weekends watching cricket, cycling and walking.

### **Gwyn Gascoigne**

I have working in housing for 17 years and specialised in income management for the last 7 years. I have worked for a variety of housing organisations, including Local Authorities, ALMOS and Housing Associations, across the whole of the Midlands. I am a corporate member of the CIH and a co-optee on the East Midlands regional Board.

### **Ian Alderson**

Ian is a solicitor and a partner in Brabners LLP, where is the head of the housing management and litigation team in the housing and regeneration department.

Ian is a qualified mediator and a member of the Chartered Institute of Housing and the Property Litigation Association.

Ian acts for a wide variety of clients from large national housing associations to small housing co-operatives. His particular areas of expertise include writing tenancy agreements and policy documents, leasehold management (including service charge disputes), supported housing and human rights and judicial review cases. He has been involved in a number of high profile cases, including the 2007 House of Lords case of *Riverside Housing Association v White*.

The Chambers 2014 Guide to the UK Legal Profession lists Ian as one of the leading lawyers in the social housing sector, saying "*Sources underscore his reputation and popularity with clients: "He has an excellent reputation across Merseyside," reports one interviewee.*"

Away from work, Ian provides a taxi service for his children and is a keen rock climber, an incompetent cricketer and a sometimes downcast supporter of Sunderland football club.



#nhcri14



# Presentations

#nhcri14

Successful places  
with homes and jobs



**A NATIONAL AGENCY WORKING LOCALLY**

**NHC Resident Involvement Conference**  
Value for Money – What's it all about?

Graeme Foster  
5 June 2014

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**The Value for Money Standard**



- New VFM standard introduced April 2012
- Sharper focus on providers delivering VFM in meeting their objectives
- Underpinned by fundamental regulatory principles: co-regulation, assurance and risk based regulation, proportionality.

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**What does the standard say?**



- Registered providers shall articulate and deliver a comprehensive and strategic approach to achieving value for money in meeting their organisation's objectives.
- Specific expectations that providers have a robust approach to use of resources; understand the return on their assets; have performance management and scrutiny functions that drive VFM; and understand the costs and outcomes of delivering specific services.
- Providers expected to publish an annual self-assessment that sets out in a way that is transparent and accessible to stakeholders how they are achieving VFM in delivering their objectives.

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**The self-assessment**



- The VFM standard sets specific expectations that a provider's self-assessment must:
  - enable stakeholders to understand the return on assets measured against the organisation's objectives
  - set out the absolute and comparative costs of delivering specific services
  - evidence the value for money gains that have been and will be made and how these have and will be realised over time
- Accounts Direction specifies that providers must include a self-assessment in the Operating and Financial Review or Board Report.
- The self-assessment will be a key focus of the HCA's regulatory activity

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**What is the standard seeking to achieve?**



- The Regulator is seeking to gain assurance that:
  - providers have a comprehensive and strategic approach to VFM
  - providers operate as efficiently and effectively as possible, seeking to control and optimise the relationship between costs and quality of services
  - boards consider the use of their assets in the round and seek the best strategy for delivering value from them, whilst meeting organisational objectives
  - boards are clear about their strategy and how the business is structured and how its resources are applied to deliver their plan
  - the provider is as transparent as possible about the above and can be held to account by key stakeholders.

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**What is the standard seeking to achieve?**



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### What is the standard not trying to achieve?



- The Regulator is not seeking to:
  - direct where providers apply their resources, beyond ensuring that they meet our standards, as they are independent businesses
  - determine how much a unit of social housing provision should cost to manage and maintain
  - dictate organisational form
  - prevent or discourage providers from getting involved in wider community or regeneration activities
  - encourage providers to focus on reducing costs at the expense of quality of service.

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### VFM as part of good governance



- Registered providers shall ensure that they operate an appropriate strategic planning and control framework that identifies and manages risks to the delivery of their objectives and compliance with regulatory standards.  
(Regulatory Framework G&V standard para 1.2)
- Essential function of the board should include:
  - Establish a framework for approving strategies, policies and plans to achieve those objectives
  - Monitor the organisation's performance in relation to these strategies, plans, budgets.....  
(NHF Excellence in governance)
- The requirements of the Value for Money standard simply capture what an effective board will already be doing.
- VFM is integral to good governance and should be embedded in within the boards strategic planning and control framework.

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### VFM as part of good governance



“Social landlords which don't comply with value for money rules face a governance downgrade.”

(Inside Housing, Julian Ashby, 10 January 2014)

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**How has the sector responded?**



- Most providers produced self-assessments in their accounts by end September 2013.
- Many also published more detailed self-assessments, often tailored to different stakeholder groups, particularly tenants.
- HCA has undertaken review of providers' self-assessments, both evidence in OFRs and where necessary other published information.
- There has been a wide range of provider responses.

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**Transparent self-assessments**



- Some providers have published carefully considered self-assessments that transparently permit stakeholders to understand their performance against the specific requirements of the standard:
  - Clear information on return on assets and how this has been used to inform decisions on the management of the asset base (e.g. decisions on management and maintenance spend or on stock consolidation)
  - Transparent quantified evidence on cost of delivering specific services, compared with the provider's performance in previous years and with a relevant peer group. Clear links between cost of delivery and quality of outcomes.
  - Systematic evidence of past value for money savings and specific, measurable targets for future ambitions. Links made between savings and efficiency gains and achievement of provider's overall strategy.

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**Opaque self-assessments**



- However, other providers have published self-assessments that do not, or only partially, provide evidence that would allow stakeholders to assess their performance against the specific requirements of the standard. E.g.
  - No evidence relating to return on assets or no explanation of how management of the provider's assets delivers its objectives;
  - Lack of quantified data showing costs of specific services. No data showing comparison with past performance or other providers. Selective use of comparisons only showing favourable comparators rather than considering performance in the round.
  - Limited, or no, evidence of past gains. More frequently, little detail of future aspirations for VFM improvements.

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### Summary of findings 2012/13

- c250 assessments (c240 with March y/e)
  - 15 Non compliant
    - 14 downgrades in governance
- Issues leading to a downgrade:
  - We have not been able to gain sufficient assurance that there is a strategic approach to value for money.
  - Not communicated to stakeholders in a transparent and timely manner.

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### Key messages for 2013/14

- The Regulatory Framework sets an expectation that providers should develop a strategy to deliver continuous improvement in:
  - **Running costs.** We expect published data to convey to stakeholders an overall sense of your performance and not just cherry pick where you have done well.
  - **Return on assets.** We expect such analysis to underpin decisions on your assets, for example whether to hold particular stock in its current form, dispose of it to another provider or (when vacant) on the open market, or convert it to another tenure.
  - **Evidence of gains.** We expect, targets to be set against which you can be held to account by stakeholders.
  - **Transparency.** We expect your strategy and performance to be transparent to stakeholders.

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### Key messages for 2013/14

- Signpost other key documents in your board report / operating and financial review.
- No room for complacency. For most what was good enough in 2012/13 won't be good enough next year.
- Ask yourselves:
  - Does the self-assessment give the reader enough information to make a judgement on whether your organisation offers value for money in delivering your objectives compared to your peers?
  - Does it give them enough information to judge whether you are doing better or worse than last year?

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Questions?



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## Value for money – from strategy to delivery



**Jon Mallen-Beadle**  
Managing Director



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## The Gateshead Housing Company



- ♥ We are a Arms Length Management Organisation
- ♥ Manage 21,000 properties plus 1,000 leaseholders
- ♥ 340 employees
- ♥ Completed Decent Homes in 2012
- ♥ Focus on supporting the Council
- ♥ Subsidiary to deliver new build



Gateshead Council

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### Our priorities:

- 1 Sustainability of tenancies and estates
- 2 Sustainability of assets
- 3 Customer-focused repairs service
- 4 Managing properties on behalf of others
- 5 Exploring external funding opportunities
- 6 Co-regulation and scrutiny

**Glossy strategy or actual delivery**  
**Strategy is important**  
**Culture is more important**



Gateshead Council

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### TGHC's VFM Strategy

- ♥ Promotion of value for money principles
- ♥ Encouraging economic awareness of our employees and customers
- ♥ Creation, maintenance and promotion of economic, efficient and effective purchasing principles in our business activities and for the benefit of our customers
- ♥ Minimising waste from our business operations



Gateshead Council Housing

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### TGHC's VFM Strategy

- ♥ Extending efficiency principles in our Repairs and Maintenance partners and in any new development
- ♥ Seeking effective opportunities to improve the conditions of our housing stock and their immediate surroundings
- ♥ Provision of energy saving, waste minimisation and water conservation advice to our employees and customers



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### Customers role in VFM



- ♥ Our tenants have a key role in delivering value for money
- ♥ We have three separate tenant structures that link into our business planning and objective setting
- ♥ TALISMAN
- ♥ Complaints Panel
- ♥ Service Improvement Groups



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### Service Improvement Groups



- Setup in 2006 eight Service Improvement Groups
- Groups consists of tenants and leaseholders
- Groups role is to scrutinise services and work with service managers to improve service delivery
- One group specifically setup to look at value for money



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### VFM SIG



- Developed the value for money strategy
- Undertake annual assessment against the VFM standard
- Developed VFM survey on employee awareness
- Review and challenge annual budget
- Review employee value for money suggestions
- Discuss and challenge KPI's with a financial implication



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### Decent Homes

- The Decent Homes programme in Gateshead involved spending £330 million over 6 years
- Over 20,000 homes were brought up to the Gateshead Standard
- We procured three construction partners to deliver this work



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### Decent Homes

- Partnership was not working
- Three separate contractors with their own supply chains, materials and systems
- This is where I got involved
- Relationships were too cosy
- Keen to bring in external expert



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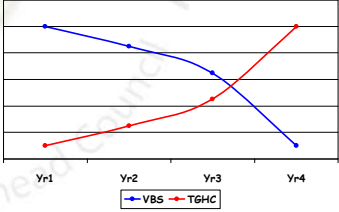
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### Decent Homes

- Appointed Vantage Business Solutions
- Innovative approach
- Delivered £19 million of savings over the remainder of the programme
- And increased customer satisfaction



| Year | VBS (Savings) | TGHC (Savings) |
|------|---------------|----------------|
| Yr1  | High          | Low            |
| Yr2  | Medium-High   | Low-Medium     |
| Yr3  | Medium        | Medium         |
| Yr4  | Low           | High           |



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### Decent Homes

- £14 million in relation to replacement elements
- £1 million reduction in overheads and profit
- £4 million reduction in preliminaries
- What did we do with the savings?



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### Decent Homes

- ♥ £9 million invested in replacement boilers
- ♥ £5 million invested in sustainability projects
- ♥ £3 million invested in multi storey improvements
- ♥ £2 million invested on a tenants reward scheme



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### Post Decent Homes Efficiency Savings



- ♥ What has happened since?
- ♥ We haven't rested on our laurels
- ♥ Used the knowledge and training provided by Vantage to empower staff and customers to continue to drive the value for money agenda



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### Post Decent Homes Efficiency Savings



- ♥ Service Improvement Groups key driver of value for money
- ♥ Performance related fees
- ♥ Energy Efficiency
- ♥ Repairs and maintenance
- ♥ Services provided in the community



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### To conclude

Value for money and efficiencies are here to stay

We believe that customers and staff need to be at the heart of embedding value for money

Don't be afraid to get external support if needed but make sure you work with organisations who are prepared to transfer knowledge and step back at the right time



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**Thank you, I would be happy to take any questions**



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## Get Online Wythenshawe

Ben Harrison  
Dean Slavin



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## Overview

- Digital Inclusion
- Why now?
- Get Online Wythenshawe
- The tenant journey so far...
- Group Exercise
- Feedback



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## Digital Inclusion

- What is Digital Inclusion?
- Why is Digital Inclusion important?
- Life chances...



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### Get Online Wythenshawe

- Tenant survey summer 2013 – access and skills
- Access – Computer Refurbishing Centre
- Staff – Talent Pool
- Skills – basic skills classes
- Incentives



Wythenshawe  
Community Training Centre

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### The tenant journey so far...

- Shaping the service
- Digital Champions
- Case studies
- Community outcomes



Wythenshawe  
Community Training Centre

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### Where next...

- Schools
- Local businesses
- Universal Credit
- A tenant-led social enterprise???
- Tenants, tenants, tenants!!!



Wythenshawe  
Community Training Centre

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### Group Exercise

- Embedding Digital Champions in social housing
- 10 minutes to answer questions and then feedback and group discussion...



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### Any Questions?



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## Achieving positive engagement with hard to reach groups

Tracy Jagger – Senior Corporate Services Officer  
Stewart Barnes – Occupational Therapist



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## What is Habinteg?



A leading provider of inclusive housing for disabled and non-disabled people.

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## A little history

Since 1970, we have provided inclusive and accessible housing together with support to enable tenants to achieve and sustain independent living.

We provide homes and services to over 3,400 households, of which 1200 homes are designed specifically for wheelchair users.

First disabled board member appointed 1991

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**Our Mission**



To champion inclusion by providing and promoting accessible homes...

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**Our mission**

To champion inclusion by providing and promoting accessible homes and neighbourhoods that welcome and include everyone.

We do this in three ways:

- providing homes and services
- demonstrating our expertise
- influencing decisions.

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**History**

- 1990's – developed lifetime homes standard in partnership with Joseph Rowntree Foundation
- Acquisitions – Hanover (2009) and Raglan Housing (2013)
- Transfer of undertaking - Livability Housing (2010)
- 2012 – Centre for Accessible Environments became a subsidiary

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### Our Homes

- All new builds developed since 1990's are to Lifetime Homes standard
- Integrated schemes for disabled and non disabled, avoid social exclusion and avoid segregation
- Community Assistants – locally based service providing low level support covering all schemes

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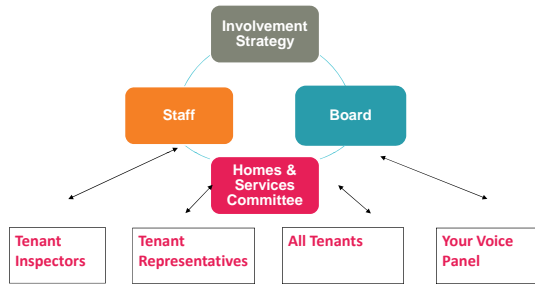
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### Tenant involvement framework



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### Disability / Ethnicity Statistics

- Your Voice Panel 4% BME & 76% Disabled
- Tenant Inspectors (12) 8% BME & 66% Disabled
- Tenant Representatives (38) 10% BME & 44% Disabled
  
- Staff 22% self classify disabled
- 12 board members 2 self classify disabled

All Habinteg's work is underpinned by Social Model of Disability

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**What does “Social Model” mean?**

1. The ability to Socialise?
  2. It is Society that disables people?
  3. All people are equal and should be treated as such?
  4. All disabled people should be looked after by society?
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**Our philosophy**



We believe that people are disabled from participating fully in society, by the barriers that society presents.

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**Access – what to look for**

Entrance

- are there revolving doors?
  - is the entrance level access?
  - if ramp, what is the height?
  - do entrance doors open to specific width?
  - floor surfaces, cobbled streets?
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**Access – what to look for**

Bedrooms:

- are there rooms with hoists and walk-in-showers?
  - is there adequate turning space for a wheelchair in adapted rooms?
  - review the height of beds
  - is the pull cord alarm accessible, at right height?
  - are there adjoining rooms for carers?
  - does medical need necessitate accommodation?
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**Access – what to look for**

Meeting Rooms

- does the hotel have ground floor rooms?
  - are there hearing loops installed?
  - do the meeting tables have height adjusters?
  - is there adequate turning space for wheelchairs?
  - do both doors open for access into room?
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**Access – what to look for**

Travel

- is the train station accessible to wheelchair users or people with mobility issues?
- what is the easiest option for the tenant to travel
- trains – is a ramp required, wheelchair space or
- can the tenant transfer from wheelchair to seat?

Lifts

- Is the cabin width suitable for electric wheelchairs?

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**Additional support**

The involvement activities we offer:

- Have a range of involvement options to suit all
- Look at digital options to increase participation

Communication:

- Accessible communications registers
- Use plain English, large print and Braille
- Separate neighbourhood charter for tenants in dispersed

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**Additional support**

Arranging meetings

- Change the times of meetings to enable participation
- Introduce evening annual scheme meetings
- Try not to organise meetings on religious dates
- Tailor meetings to specific parts of the country

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### Additional support

#### Expenses

- Pay for registered child care and carers to enable participation
- Provide out of pocket expenses and mileage claims

#### Tenant lead:

- In-house training programme – topics chosen by tenants

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### How do we know that adaptations are improving peoples quality of life?

1. Habinteg carry out lots of adaptations and no-one has said that they are not helping.
2. Habinteg employ an Occupational Therapist and they know what helps
3. The contractors tell us
4. We ask the tenant.

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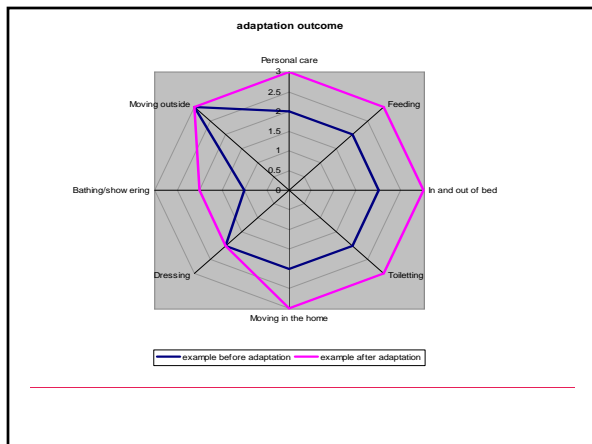
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Questions?

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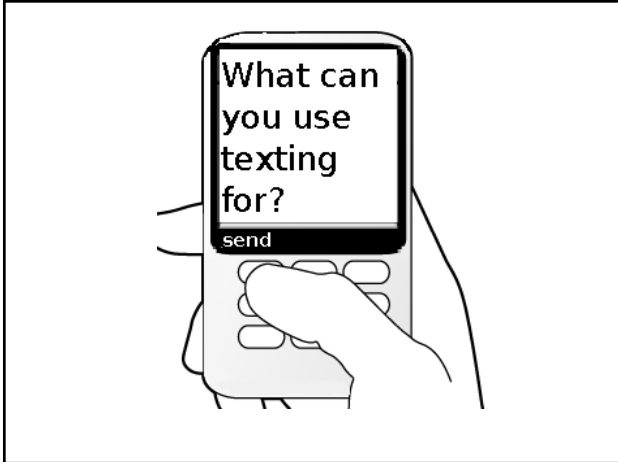
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Reminding people to come along.

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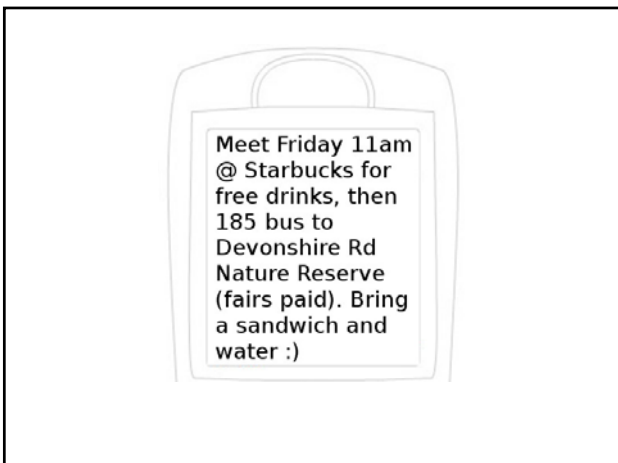
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“The messages make the difference to whether I come or not”

Karen

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“The response we get from our text messaging is instant and effective.

Within seconds of sending out a message the phones start ringing.

It is a good way to infill workshops at the last minute and also a way to inform our clients of opportunities that need to be urgently filled.”

Community development trust in South London

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Co-ordination

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Sent by Shawwna Clough, Raw Talent volunteer.

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How much time do you spend doing ring rounds?

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Share useful information

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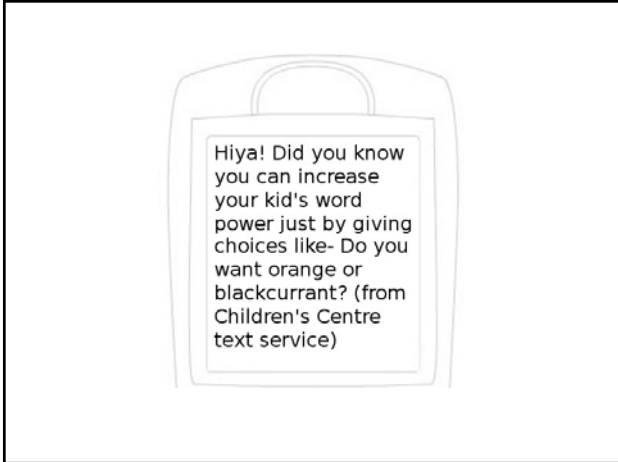
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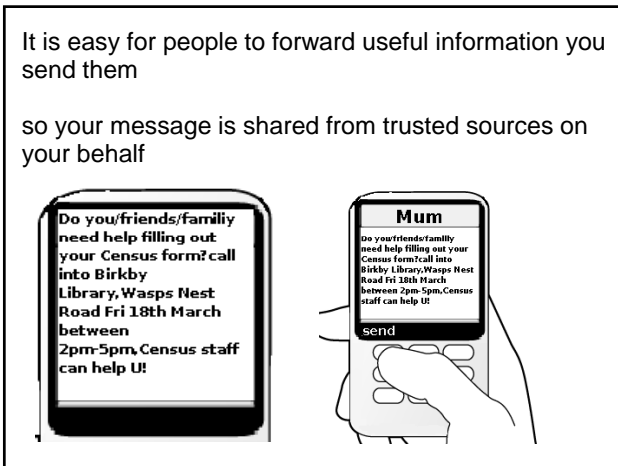
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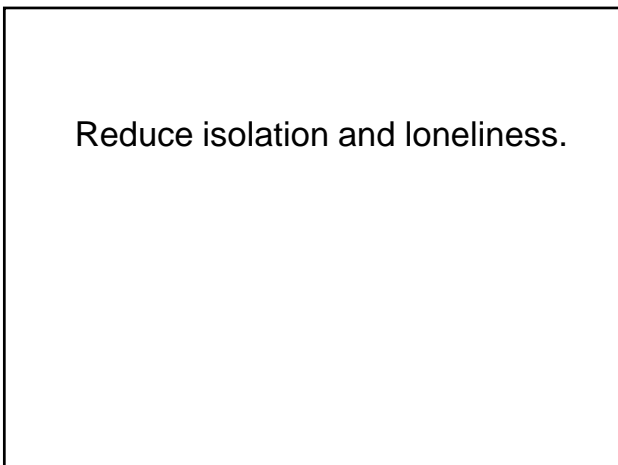
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"I was feeling very down, I got the text and it lifted me back up."

"One message I received made me think about myself then act on it."

"They make me feel better. I like to share them with people as well"

"When I get texts on an evening and a weekend it's best because that's when I need it most."

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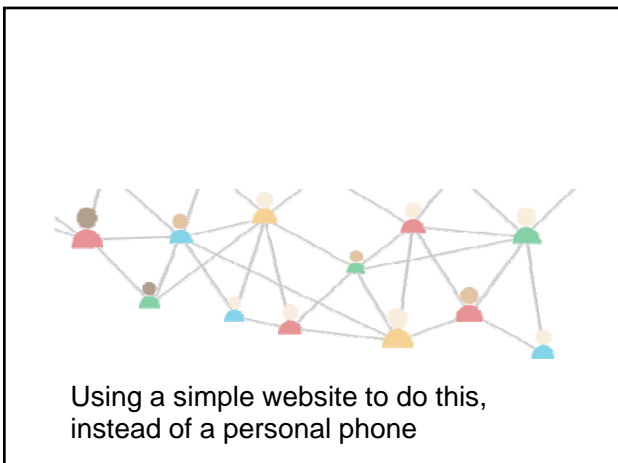
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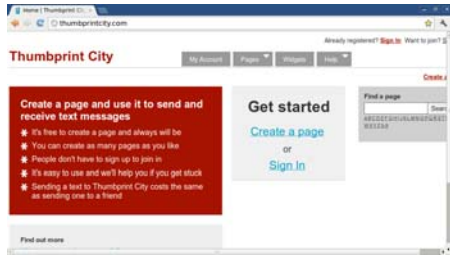
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A web page to send and receive text messages to and from groups and individuals.



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### Group exercise

1. What is the purpose of using texting for you?
2. How will you get there?
3. What resources do you need to get there?
4. Where will you get the resources from?

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### "Gotchas"

For small voluntary groups, how will you go about collecting mobile numbers?

For housing organisations, if you have a web based texting service, for example to report repairs, and you aren't already using it in ways I've described, what does that mean as a starting point?

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#nhcri14

Andrew Wilson  
andrew@thumbprint.coop  
07980 224 927

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#nhcri14

**Undertaking a Value For Money Review of Customer Involvement**  
**Natalie Pryor & Sheila Fitzpatrick**

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**LMH: The story so far**

- Five years old – established in 2008
- 15,000 properties in Liverpool
- Remaining council housing stock in poor state
- 2 Neighbourhood areas – North and South
- Tenant led – majority tenants on the Board

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**Customer Involvement at LMH**

- 5 Customer Involvement Officers based in Housing Management
  - 4 Community based officers
  - 1 Leasehold and Youth specialist
- Responsible for:
  - Tenants and Residents Associations
  - Area based panels to distribute Community Initiative Fund
  - Policy Review/Task and Finish Groups
  - Impact Days
  - Regeneration Initiatives
- 1 Co regulation specialist based in Business Support
  - Scrutiny Panel
  - Tenant Inspectors
  - Equality Focus Groups
- TP tracker to record involvement activity

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**VFM is....**

The optimum balance between the 3 'E's (Economy Efficiency and Effectiveness)

- Relatively low costs
- High productivity
- Successful outcomes
  - Improved performance on RI
  - Reduced costs
  - Increased customer satisfaction
  - Reduced waste
  - Added value

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**Or....**

Spending money or time wisely

Getting the best deal

- spending more to get better results
- spending the same amount and achieving more
- spending less to get the same



*Pride in Our Homes, Proud of Our Neighbourhoods*

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**Value For Money – Why now?**

- Changes in regulation – VFM standard and statement
- New partnership with Business Support to facilitate co regulation
- Develop recording and reporting impact of involvement at LMH
- Newly formed Regeneration team
- Improved clarity – what resources and money do we spend on involving customers?
- Is expenditure and time based on customer needs & expectations?
- Bedroom tax and universal credit

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**How we did it**

- Steering group
- Buy in from staff and tenants
- Scoped review
- Research and information gathering
- Templates for analysis and valuation
- Team 'challenge'

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**How we did it – Steering Group and buy in**



*Pride in Our Homes, Proud of Our Neighbourhoods*

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**The Scope**

- Does the current menu of involvement meet the needs of LMH's diverse customers?
- As a "tenant led" mutual organisation, how does customer involvement link to the development of LMH corporate priorities?
- Customer involvement in post promises period. What next for involvement?
- How does customer involvement support the wider regeneration agenda?
- How does customer involvement support co regulation?
- How is performance monitored and measured?

*Pride in Our Homes, Proud of Our Neighbourhoods*

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### Research and Information Gathering



*Pride in Our Homes, Proud of Our Neighbourhoods*

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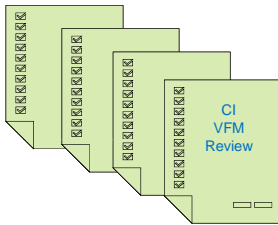
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### Templates



*Pride in Our Homes, Proud of Our Neighbourhoods*

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### Challenge



*Pride in Our Homes, Proud of Our Neighbourhoods*

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**Recommendations**

- Recent service user consultation
- Review the role of Review Standards Group
- Review financial support to TARA's
- New system to capture and report on Involvement
- Merge Customer Involvement and Regeneration teams
- Performance Indicators

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**Monitoring Outcomes**

- Actions agreed between service managers
- Logged on performance management system
- Report to Customer Experience Committee and Board
- Feedback to tenants – involved tenants & all shareholders
- Measures – new involvement PI's agreed
- Implementation of new IT system

*Pride in Our Homes, Proud of Our Neighbourhoods*

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**QUESTIONS?**

*Pride in Our Homes, Proud of Our Neighbourhoods*

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#nhcri14



VIPs – “Vela Improvement People”  
5<sup>th</sup> June 2014, Blackpool

# thirteen

Members of the Thirteen Group  


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## VIPs – Vela Improvement People

Jonathan Cannon  
Customer Involvement officer  
[Jonathan.cannon@thirteengroup.co.uk](mailto:Jonathan.cannon@thirteengroup.co.uk)  
01429 525491  
07951 277763

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### Scrutiny at Vela

- Past three years have had two Scrutiny groups, now brought together as one
- Number of Service Improvement Groups
- Two Customer Panels
- Peer Review project with 4 other landlords in the North East
- Estate walkabouts
- No tenant inspectors or mystery shoppers
- Lots of customer satisfaction surveys
- Some involvement of customers in service reviews
- Future Scrutiny under Thirteen will probably include 4 landlords !

thirteen

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Your mission if you choose to accept it.....

- Embed co-regulation more fully in how we operate and improve services
- Support the needs of Scrutiny
- Broaden the range of involvement methods rather than just meetings
- Take on board more customers' views
- Challenge but support all our business areas
- Link to areas of concern or poor performance
- Assess impact of service changes

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Methodology

We have trained and skilled 20 customers to;

- Carry out telephone surveys with other customers
- Run focus groups with other customers, contractors and staff
- Review performance information or service standards
- Carry out research into other landlords good practice
- Produce a short report with recommendations

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Recruitment of VIPs and generating projects

- 20 involved customers trained in co-regulation and VIP concept
- Managers informed of the VIP concept and asked to generate possible VIP projects (14 ideas that have come forward so far)
- Training programme for the VIPs developed (Sept-April 14)
- Have informed our customer groups and are looking for customer-led projects
- All VIP projects will be short and snappy
- 8 weeks max – 5 VIPs per project

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Training package

- Customer scrutiny and co-regulation (Yvonne Davies)
- Customer service and telephone technique (in-house - free)
- Data Protection and confidentiality (local training provider – cheap)
- Listening, recording information and reports (local training provider – cheap)
- Running a focus group (in-house – free)
- Safeguarding children/vulnerable adults (Local Authority – free)

Other courses planned but not delivered yet include;

Mystery shopping – Mental health – Domestic violence – Equality & Diversity



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Timetable for a project

- Week 1 – scoping meeting with service manager and VIPs giving background to project, any performance info, short presentation and produce an action plan
- Week 2 to 4 – more of the above, analysis, sampling of customers, produce questions, agree approach, letters out informing customers
- Weeks 5 to 6 – customers surveys, focus groups, mystery shopping, benchmarking, research
- Weeks 7 to 8 – pulling together findings and producing the report with recommendations

This is then followed by a presentation to the manager and agreement of an action plan



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VIP projects

- Regeneration of Belle Vue estate in Hartlepool
- Regeneration of Victoria estate in Stockton
- Evaluation of the High Rise Support Service in Stockton

- All three projects have now concluded and the draft reports and recommendations have been presented to the managers who commissioned the work
- Meetings took place on 8<sup>th</sup> and 9<sup>th</sup> April to consider the action plans developed by the managers
- Reports and action plans have been shared with customer panels in April and placed on the website
- Action plans will be monitored by the VIP groups every six months



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VIP project 1 “Belle Vue regeneration”

- Idea came from Mark Dutton (Head of Regeneration)
- Speak to a sample of tenants/residents who were decanted from Belle Vue regeneration in Hartlepool (130 properties demolished and replaced with 100 new build, mixed tenure)
- Mark wanted to learn about how we could have improved the customer experience and improve future regeneration projects
- Spoke to residents who had moved, new residents, residents from the surrounding area and local resident groups
- Mixture of focus groups and postal surveys



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VIP project 2 “Victoria regeneration”

- Again, the idea came from Mark Dutton (Head of Regeneration)
- Speak to a sample of tenants/residents who are affected by the Victoria regeneration project in Stockton (254 properties to be demolished in a phased approach)
- Mark wanted to learn about how we could have improved the customer experience and improve future regeneration projects
- Spoke to residents who had moved in phase 1 and those waiting to move (phases 2-5)
- Mixture of focus groups and postal surveys
- This programme will take a number of years so will help shape working practices with immediate effect



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VIP project 3 “High Rise Support service”

- Idea came from Paul Noddings (Housing Operations manager, Tristar)
- Paul wanted to review the changes made to the Concierge service in the High Rise blocks in Stockton which were introduced in July 13
- 1,000 customers across 11 blocks (10% of Tristar Homes overall stock)
- Satisfaction survey in Sept 13 showed high levels of dissatisfaction from 4 of the blocks
- Mixture of postal surveys and focus groups in the communal areas of each block



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New VIP project

Meeting took place with Marilyn Wilson (Performance Manager for Property services) to look at why people are not keeping their gas servicing appointments;

- Tristar Homes - in January 2014 there were 748 completed gas services but 398 "no access", which is 35%
- Housing Hartlepool - in January 2014 there were 675 completed gas services but 249 "no access", which is 27%
- Huge waste of time and money calling to see people and creates major headache trying to plan follow-up calls
- VIP group to carry out phone surveys over a 3 month period, sampling tenants from both landlords, starting in May



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Scrutiny's four VIP projects

- Survey of tenants who have given their notice to leave, to find out why and what we could have done to prevent it
- Survey of customers on the transfer list and mutual exchange list to find out why they are wanting to transfer/MEX and see if they are getting enough support
- Survey of new tenants to see if they are getting the right advice and information to help them sustain their tenancy (after their 4 week follow-up visit from their Patch Manager)
- Survey of people who have had investment works done over 6 months previously, to see if it has saved them money on heating bills



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Why does it deliver VFM ?

- Supports co-regulation – can be commissioned by Board and managers and from concerns raised by tenants on customer groups
- Cost effective – short training programme and includes on-the-job training
- Customers leading the setting of questions and methodology use to investigate from a menu of tools in their box
- Quality of engagement for customer – both the VIPs and a range of customers are spoken to
- Low training costs
- Delivers and produces an action plan in 8 weeks



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Benefits

- First three reports were well received by managers
- VIPs said it was the best form of involvement they had taken part in for some time
- One project can gather the views of over a hundred customers as well as the local community
- Customers more likely to talk honestly to other customers
- Potential links to employability, good experience for those looking for a job
- They're like mini-scrutiny pieces but not as in depth
- Useful tool for your Scrutiny group to get customer feedback as well as staff



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Next stages

- We now have a dedicated post within the CI team to run the VIP projects
- Develop a 12 month programme of VIP projects
- Covering a broad section of business areas and across landlords
- Carry out projects generated by Scrutiny group (every 3 months)
- Develop closer links with Service Improvement team and new managers across the Thirteen group
- Recruit more VIPs under the new Thirteen group (32,500 customers now)
- Find a new name (Customer Service Investigators – CSI - current favourite !)



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**ProPoints Resident Reward Scheme**

Gwyn Gascoigne – Income Strategy and Operations Manager



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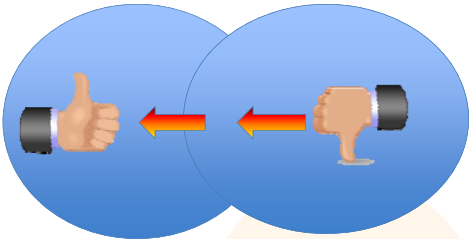
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**How The Scheme Changes Behaviour**





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**Launch - How The Scheme Works**



- Scheme launched on 1 May 2010
- 3 year pilot, extended to Dec 2013
- Open to all customers who have a secure, assured non-shorthold or fixed term tenancy agreement
- Customers earn 'ProPoints' for each month they maintain the terms of their tenancy conditions
- ProPoints = shopping vouchers





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Qualifying criteria



A collage of five images: a stack of coins, a pile of rubble, a woman with a wide-eyed, shouting expression, a man in a suit holding several playing cards, and a destroyed building with a 'safe' sign.

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Internal Benefits



- We are absolutely confident in the integrity of our net arrears figures – if they weren't right our customers would not get their points. Other data cleaning has also taken place as a result.
- Staff attitudes to low level tenancy breaches have been challenged
- We have achieved personal contact with around 8,000 customers a year who may otherwise be silent to us
- Use of vouchers for home contents insurance – potentially saving us money
- Allowed us to focus more on low level debt by reducing the number of Accounts Officers from 9 to 8, and using the money for value added services
- Allowed us to collect Direct Debits in advance, without complaint by customers (with an initial 11 month cycle)
- Engaged with the local economy with over 50 local suppliers on board



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Some of the Brucie's...



- **130** people persuaded to register for the customer secure area in exchange for 100 points (equivalent to £0.50) – this will reduce unavoidable contact into the customer service centre
- **137** customer persuaded to change their payment method to our cheapest – Direct Debit in exchange for 2000 points (£10.00). Transaction cost saving calculated to be around £2000 per year.
- Further **500** changed to DD in November 12, connected to welfare reform/ ProPoints offer (approx. half on full HB presently)
- **68** customers persuaded to clear their account by the end of March 2012 to earn back their missing points for February and March.
- Rewarded **5** long term loyal customers over 100 with a special points bonus.
- Additional points for residents who allow us ongoing access to monitor energy usage at our passivhaus schemes



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**Evaluation – Why We Rewarded Tenants** 

|  | May 2010 | Oct 2010 | May 2011 | Oct 2011 | May 2012 | Oct 2012 | May 2013 | Oct 2013 | Dec 2013 |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Residents participating                      | 12590    | 12934    | 13043    | 12827*   | 12974    | 12970    | 13015    | 12914    | 12874    |
| Residents awarded points                     | 5519     | 5984     | 7572     | 7953     | 8205     | 8703     | 8196     | 8256     | 8498     |
| % participating residents earning points     | 43%      | 46%      | 58%      | 62%      | 63%      | 67%      | 63%      | 64%      | 66%      |
| Gas exclusions                               | 24       | 27       | 70       | 23       | 17       | 43       | 0        | 3        | 0        |
| ASB exclusions                               | 19       | 13       | 11       | 4        | 0        | 0        | 0        | 7        | 0        |
| Customers with low level arrears (up to 100) | 2619     | 1875     | 1577     | 1428     | 1300     | 894      | 1396     | 1002     | 1013     |

\* Reduction in participation due to stock disposal during summer 2011  
 \* Gas and ASB exclusion numbers are after those excluded for arrears

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**Tips & Hints On How To Reward Customers** 

- Direct Debit take up
  - Paying extra to put your account in credit ready for welfare reform
  - Reducing our transaction costs
  - Introduce a friend bonus
- Keep to an agreement and gain points
- Home contents insurance expansion
- Continued take up of our online services
- Award for engagement with money advice service to maximise income
- Conditions around maintaining repair appointments
- Additional notice periods on expiry of tenancy
- Awards for those who make a difference to our services or communities


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**And finally, what our customers told us** 

"It's brilliant, it will encourage me to pay on time"

"It's a great scheme. I viewed my points online which was easy and I decided to save my points. I was happy to switch my rent payments from standing order to Direct Debit as I received bonus points, which means more shopping vouchers"

"Love the scheme as it has lots of different choices of vouchers. It encourages people to pay rent and I will make sure that my benefits are paid properly"




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Contact details



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# Housing Ombudsman Service

*“Delivering value at the HOS”*

Dr Mike Biles  
Housing Ombudsman

Northern Housing Consortium - 6 June 2014

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*“You pay for me, what do I do you for you ?”*

- role of the Ombudsman
- strategic objectives
- remain relevant
- make impact (positive difference)
- add value
- “top tips”

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## role of the Ombudsman

- resolve disputes involving members of the Scheme, including making awards of compensation or other remedies when appropriate
- as well as to**
- support effective landlord-tenant dispute resolution by others

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strategic objectives

- mission
- vision
- primary outcomes

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mission



“impartial dispute resolution in rented housing”

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vision



“working with others to increase trust in dispute resolution and to improve landlord and tenant relations”

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mission + vision – 3 elements



1. To deliver our vision we shall work with landlords and tenants to resolve disputes that come to us **impartially** using processes that are **fair, evidence-based**, and **free of bias** and **prejudice**.
2. **These principles of dispute resolution** are the basis of our work with landlords, MPs, councillors and Designated Tenant Panels to resolve disputes that come to them – and with tenants so they understand these principles.
3. Together we shall achieve **accessible dispute resolution** that will be of benefit to both landlords and tenants and encourage landlords to use these outcomes to improve the services they provide.

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primary outcomes

the primary outcomes of our vision and mission are that, in 2016:

- tenants and landlords have increased trust in dispute resolution
- tenant and landlord relations are improved
- landlords have a positive view of complaints
- “designated persons” are able to play their part in resolving disputes fairly

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strategy

- to be sustainable and relevant
- to make a positive difference
- to add value

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sustainable and relevant

a service that is relevant and meets the needs of Parliament, customers, and other stakeholders



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make a positive difference:

- catalyst for change in the rented-housing sector (emphasis on customer's perspective)
- champion of good practice (appropriate and proportionate media)
- demonstrate impact through richer data (evidence of performance successes)
- apply resources proportionately (investigation – systemic failure – knowledge)



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add value:

- outputs
- compliance
- referral
- advice, assistance, signposting
- external perspective



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add value:

- 'gratis' recommendations
- service failure
- local DR
- local solutions
- share learning



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add value:

- proactive engagement
  - attend events
  - customer feedback
  - landlord account managers
  - sector development
  - website
    - stakeholder engagement strategy
- dispute resolution principles
- e-learning



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dispute resolution principles  
<http://www.housing-ombudsman.org.uk/search-results/?term=dispute%20resolution%20principles>



e – learning  
<http://www.housing-ombudsman.org.uk/advice-faqs/landlord-e-learning/>

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“ten top tips” ... to make the Ombudsman happy

- resolve it locally – work together
- residents’ awareness of their rights
- erase the myth of the ‘8-week rule’
- make use of the DRPs
- have a go at the e-learning
- don’t be afraid to talk to us

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# Housing

Ombudsman Service

[www.housing-ombudsman.org.uk](http://www.housing-ombudsman.org.uk)  
[lwoods@housing-ombudsman.org.uk](mailto:lwoods@housing-ombudsman.org.uk)  
0300 111 3000  
81 Aldwych - London - WC2B 4HN

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**THE LESS THAN WONDERFUL  
WORLD OF BEDROOM TAX**

Ian Alderson  
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0151 600 3317

**Brabners**

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The correct terminology:  
“**Bedroom Tax**” or  
“**Withdrawal of the Spare Room Subsidy**”?



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**What is it?**



- Came into effect in April 2013
- Affects households deemed to have extra bedrooms
- One bedroom is allowed for:
  - Every adult couple
  - Every single adult aged 16+
  - Any 2 children of the same sex aged under 16
  - Any 2 children (of whatever sex) aged under 10
  - Any other child
- Special rules concerning carers, disabled children and services personnel

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### What does it do?



- Under-occupying by 1 bedroom:
  - 14% reduction in housing benefit
- Under-occupying by 2 bedroom:
  - 25% reduction in housing benefit
- Making up the shortfall:
  - From other benefits/income intended to cover living expenses
- Numbers affected: DWP statistics for August 2013:
  - 429,000 households: 1 extra bedroom
  - 92,000 households: 2 extra bedrooms
  - Disproportionate impact in the North
- Discretionary Housing Payments (DHPs) available to reduce impact

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### Some figures: “lies, damned lies and statistics”



- Using the August 2013 figure:
  - Annual saving £393m
- Context
  - Annual HB costs: £23.8 billion (£23,800m) (1.7%)
  - Proposed welfare cost - £120 billion (£120,000m) (0.3%)
- Extra DHPs of £140m available for 2013-14
  - Also used to reduce impact of other benefit changes, including the benefit cap
- Other costs:
  - Empty houses & converting bigger properties into smaller ones
  - Private sector rents
  - Eviction costs
  - HB appeals and litigation

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### Bedroom tax: the legal fallout



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### Bedroom tax: the legal fallout



- Exemptions:
  - The 1996 loophole
  - Disability related exemptions
  - Exempt accommodation and supported housing
- What is a “bedroom”?
  - Should landlords re-designate?
  - Space standards: section 326 Housing Act 1985
- Case law:
  - Court of Appeal
  - Upper Tribunal
  - First Tier Tribunal ( a selection)

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### The 1996 loophole



- This arises from transitional arrangements introduced when HB Regs were changed in 2006:
  - Some claimants were to remain under previous Regs
  - Overlooked by DWP when the legislation introducing the bedroom tax was prepared
- Affected claimants should have remained under the previous Regs and were exempt from the Bedroom Tax
- To qualify, the tenant must have:
  - Been in receipt of HB continuously since 1 January 1996:
    - Can have a break of 4 weeks or up to 52 weeks if on welfare to work
  - Lived in same property during this period
    - Except while it was uninhabitable due to fire, flood, explosion or natural catastrophe

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### The 1996 loophole: plug & effect



- Loophole plugged with effect from 3 March 2014
- Refund due for any Bedroom Tax deductions between 1 April 2013 and 3 March 2014
- Are DHPs made in this period repayable?
  - Probably not

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### Disability related exemptions



- An additional bedroom is permitted for an overnight carer where the claimant or their partner need overnight care
- Children who are unable to share a bedroom for a reason connected with disability
- There are no other disability related exemptions
- Challenges based on former bedrooms being used for medical equipment must usually be brought on the grounds that the room is not a bedroom

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### Exempt accommodation and supported housing



- Exempt accommodation is exempt from bedroom tax
- Defined as:
  - Accommodation provided by non- metropolitan county councils, housing associations, charities or voluntary organisations
  - Where that body or someone acting on its behalf also provides the claimant with care, support or supervision
- Does not include:
  - Local authority supported schemes
  - Schemes where care and support is provided by a third party (e.g. If directly commissioned by the local authority)
- Currently the subject of discussion and debate

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### What is a “bedroom”? (1)



- No definition in the Welfare Reform Act 2012, the regulations or any other directly relevant legislation
- The courts will look at the ordinary meaning of the word
- **Probably a combination of the room’s:**
  - Intended use
    - What the tenancy agreement and/or the landlord says
    - Historic use
  - Current use
    - What the tenant does with it now
    - This must be “reasonably required for ..[the claimant’s] continued occupation of the property” rather than a matter of choice
  - Potential use
    - Under a future letting
    - Room size and suitability will be relevant

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### What is a “bedroom”? (2)



#### • What isn't a bedroom?

- Probably rooms that:
  - Are too small to take a single bed
  - And a chest of drawers and small wardrobe?
  - Have no natural light
  - Are thoroughfares to other rooms
  - Attics containing a water tank/exposed pipework/wiring
  - Are generally used as living rooms

#### • Who decides?

- The HB Authority/DWP has the statutory responsibility for determining bedroom numbers – not the landlord
- In practice, the starting point will be what the landlord/tenancy agreement says

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### Should landlords re-designate?



- Social landlords are generally reluctant to do so except in cases where there has been a clear mistake
- This could reduce the rent
  - Especially if current rent is more than the target rent for the property with a reduced number of bedrooms
- Mass re-designation could play havoc with business plans
- The landlord could be open to HB reclaims
- It could put the landlord in breach of borrowing covenants:
  - Loans often on basis of desk top valuations based on property sizes measured by numbers of bedrooms
  - Lender may use this an excuse to re-negotiate terms
- Bedroom tax could be abolished post-May 2015 and landlords could have to live with the consequences of re-designation after that

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### Section 326 Housing Act 1985 (1): Space standards for overcrowding



- Has been used to provide a working definition of a bedroom
- Sets out space standard for “*sleeping accommodation*” for overcrowding purposes:
  - 110 sq ft + : 2 people
  - 90-109 sq ft :1.5 people
  - 70-89 sq ft :1 person
  - 50-69 sq ft : 0.5 person
  - Less than 50 sq ft : not suitable as sleeping accommodation
    - 0.5 person is a child under 10
- A living room is regarded as “sleeping accommodation” when calculating whether the property is overcrowded under s326
  - s326 envisages if a “bedroom” is too small, you sleep in the living room
- The Government made it clear, during the passage of the Welfare Reform Act 2012, that the space standards do not apply

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**Section 326 Housing Act 1985 (2):  
Does it work?**



- The space standard argument has been used successfully in many First Tier Tribunal (FTT) cases:
  - FTT decisions are not binding on other FTTs
  - The DWP has appealed some of these cases to the Upper Tribunal (UT), whose decisions are binding on all FTTs
  - In a FTT case in Inverness it was decided that a room of 54 sq ft was a bedroom despite its size because it was being used as a bedroom
- One view is that:
  - Floor area is a factor in deciding whether a room is a bedroom
  - But s326 cannot provide a definition, as the space standards are for a different purpose in a different context

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**Section 326 Housing Act 1985 (3):  
What does the DWP say about  
room size?**



- DWP guidance on room size - circular HB/U6 2013:
  - 4 *...the only consideration should be the composition of the household and the number of bedrooms as designated by the landlord..not by measuring rooms.*
  - 5 *In determining whether a room is a bedroom the landlord may consider a number of factors, but one of these must be whether or not a room is large enough to accommodate at least a single bed...*
- In other guidance, the DWP suggests that bedroom tax can be avoided by taking in a lodger
  - This suggests that a bedroom must be big enough for an adult
- This is guidance to local authorities and has no legal effect - FTTs can and do ignore it

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**Court of Appeal bedroom tax case (1)**



- *R (on the application of MA & others) v Secretary of State for Work & Pensions* [2014] EWCA Civ 13
- Claimants claimed that bedroom tax discriminates against disabled persons and therefore:
  - Violates their human rights
  - Breaches the Government's public sector equality duty under the Equality Act 2010
- One of the DWP's defences was that it would be too difficult to draft regulations providing exemptions exempting people with varied needs for an additional bedroom for reasons arising from their disability

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**Court of Appeal bedroom tax case (2)**



- Court of Appeal held that the bedroom tax was discriminatory in its effect
- But rejected the claim because the discrimination was “justified” and therefore was not unlawful:
  - Partly because of the availability of Discretionary Housing Payments (DHPs)
- The claimants have applied for permission to appeal to the Supreme Court
- May mean that:
  - The Government has to maintain the current high level of DHPs, which was supposed to be reduced year-on-year to avoid the discrimination becoming unlawful
  - Claimants in areas where DHP fund is exhausted can bring claims on the grounds that the discrimination, found in *MA*, is not justified

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**Upper Tribunal bedroom tax case (1)**



- *Bolton MBC v BF* [2014] UKUT 48 (AAC)
- The facts:
  - Two bedroom property occupied by C and his wife, both in receipt of Disability Living Allowance.
  - C suffered from serious respiratory conditions and was advised to sleep in a downstairs bedroom on a raised bed.
  - C’s daughter stayed 3/4 nights a week to care for her parents, sleeping on a camp bed in the living room
  - Carers are entitled to a bedroom but the Council argued that this exemption didn’t apply as the daughter slept in a living room

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**Upper Tribunal bedroom tax case (2)**



- The UT rejected the Council’s argument because:
  - The living room was a bedroom as this was how it was used.
- Result: the claimant was entitled to rent for a 2 bedroom property
- The UT reviewed the meaning of “bedroom” concluding:
  - It is not defined in the legislation, so it must be given its ordinary meaning, which was:
    - **A room furnished as a bedroom and/or used for sleeping**
- This definition should be treated with caution and should not be regarded as an exhaustive definition:
  - Otherwise removing the bed and using the room for storage would mean it wasn’t a bedroom
  - The position is more complex

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### What is a “bedroom”?



- Probably a combination of the room's:
  - **Intended use**
    - What the tenancy agreement and/or the landlord says
    - Historic use
  - **Current use**
    - What the tenant does with it now
    - This must be “reasonably required for ..[the claimant’s] continued occupation of the property” rather than a matter of choice
  - **Potential use**
    - Under a future letting
    - Room size will be relevant

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### First Tier Tribunal bedroom tax cases



- There have been a host of first instance decisions in which FTTs have interpreted “bedroom” in a variety of ways and allowed claimants’ appeals, including on:
  - Room size
  - The use (historic and current) of the room
  - Discrimination against disabled claimants
  - Extra bedrooms needed for children of separated parents
- None of these decisions are binding in other cases
- The DWP is appealing some of these cases to the Upper Tribunal, whose decision will create a binding precedent

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### Room Size: Section 326 Housing Act 1985



- Space standard for “sleeping accommodation” for overcrowding purposes:
  - 110 sq ft + : 2 people
  - 90-109 sq ft : 1.5 people
  - 70-89 sq ft : 1 person
  - 50-69 sq ft : 0.5 person
  - Less than 50 sq ft : not suitable as sleeping accommodation
- 0.5 person is a child under 10
- **Most important standard is:**
  - Minimum size for a single person bedroom – 70 sq ft

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**Room size: Fife 26.08.13**



- Room 64 sq ft used as a bedroom by claimant's children when under 16 but no longer used as a bedroom
- FTT said: "...under-occupancy can be seen as the flip-side of overcrowding, and that it is relevant to have regard to statutory space standards"
- FTT held that it was not a bedroom, as it was not large enough to accommodate an adult or two children
- This implies that a bedroom must be 70 sq ft +
- FTT rejected a storage room-use argument, as the items could be stored elsewhere
- Room size features in other FTT decisions, including in Fife (2 more), Islington, Liverpool and Aberystwyth
- DWP is appealing some of these cases to the UT
- In an Inverness case, the FTT held that a 54 sq ft room was a bedroom because it was being used as one.

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**Room use: Rochdale Jan 2014**



- Claimant lived alone in flat, let as a 2 bedroom property
- Claimant's evidence was:
  - Second bedroom had always been used as a dining room
  - There was no room for a table in the combined living room/kitchen
- Tribunal accepted claimant's evidence and said that landlords cannot "*arbitrarily re-classify room use*"
- In contrast, a Fife decision (Sept 2013) held that a room used for storing gardening equipment was a bedroom:
  - Historically, it was used as a bedroom
  - Its current use was not "*reasonably required for ..[the claimant's] continued occupation of the property*"

**Brabners**

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**Room use: Westminster Sept 2013**



- Claimant, Mr Lall, is blind
- Housing association landlord bought the property in a dilapidated state and agreed to let it to Mr Lall and to carry out alterations to make it suitable for Mr Lall:
  - Included making one room suitable for Mr Lall's reading and other equipment
  - Property had one bedroom (in addition to the equipment room)
- The landlord's agent designated the property as having two bedrooms. This was an error that was corrected by the landlord
- FTT found that "*the room was never intended to be a bedroom*"

**Brabners**

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**Room use: Glasgow April 2014**



- Property designated by housing association landlord as having 4 bedrooms – 3 upstairs and 1 downstairs
- Since the commencement of the tenancy, the claimant has used the downstairs room as a dining room and to store her motorised scooter, wheelchair and walker.
- The kitchen is too small to use for dining
- FTT held that the claimant's *"use of the downstairs room as a dining room and also for storage of her disability equipment is long established and reasonably necessary for her use of the property"*
- So it isn't a bedroom

**Brabners**

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**Disability Discrimination:  
Glasgow Sept 2013**



- Claimant had progressive multiple sclerosis:
  - She had a daytime carer, at night, her husband provided care
  - Bedroom had a hoist, a hospital single bed and needed space for a wheelchair by the bed
  - No room for a second bed for her husband
  - Council made bedroom tax deduction for the second bedroom
- FTT held that:
  - There was discrimination and it was not justified
- The regulations should be read to permit "one member of a couple who cannot share a bedroom because of severe disability" to be entitled to bedroom
- DWP is appealing this decision – probably on the basis that it is inconsistent with the Court of Appeal's decision in *MA*
- Similar decisions have been made in Redcar, Edinburgh, Brighton, Oxford and Liverpool

**Brabners**

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**Disability Discrimination:  
Liverpool Oct 2013**



- Claimant's adult daughter received overnight care from her adult sister, who stayed overnight twice a week
  - The overnight carer exemption only applies if the care is for the claimant or their partner
- FTT held:
  - This was a bedroom, despite not being used five nights a week
  - There was discrimination by not treating the daughter in the same way as the claimant (or partner) would be treated if they received overnight care. This was not justified.
  - The regulations should be read to prevent this
- These decisions may seem to be inconsistent with the Court of Appeal decision in *MA*, but can possibly be distinguished:
  - *MA* dealt with general principles, these cases deal with individual circumstances

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**Separated families:  
Liverpool Feb 2014**



- In a previous Inverness case (Nov 2013), FTT found that there was no entitlement to an extra bedroom for children staying over with a separated parent
- In the Liverpool case:
  - Claimant separated from his partner in 2006
  - Lived in a 2 bedroom flat
  - Daughter stayed with him at weekends and over school holidays
- FTT found that:
  - Daughter could be resident in two places at a time
  - The flat could not be regarded as a temporary residence
  - Staying in the flat was crucial to her well-being
  - The regulations needed to be read to allow this, otherwise the claimant's human rights would be breached

**Brabners**

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**Separated families:  
Newcastle Feb 2014**



- Son stayed with father, on average, 4 nights a week and longer in school holidays (as mother worked)
- Mother received child benefit
- The FTT held that:
  - Son could be resident in two places at a time
  - The regulations needed to be read to allow this, otherwise the claimant's human rights would be breached
  - Son's residence was not determined by who got the child benefit
- These decisions go against previous decisions of the higher courts to the effect that a child can only have one home
- Forthcoming judicial review case – *R(Rutherford & Todd) v Secretary of State for Work & Pensions*
  - Supported by CPAG & Liberty on issue of discrimination against separated families in bedroom tax cases

**Brabners**

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**Conclusions: a personal view**



- Room use arguments and room size arguments stand the best prospects of success
  - Room size arguments have been consistently accepted by FTTs but may be overturned on appeal
- Human rights arguments based on disability are problematic as they were rejected, in principle, by the Court of Appeal in *MA*
- Separated families arguments are not strong because of previous case law

**Brabners**

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#nhcri14

## Practical ideas for involving customers in Value for Money



**Yvonne Davies, Director  
Scrutiny & Empowerment Partners  
and  
Kevin Haughian, Customer  
Nehemiah United Churches HA**

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## The plan for today

- VFM and explaining this
  - Examples of different approaches taken from across the country
  - Hints and tips to tenants on influencing VfM
- The NUCHA experience:**
- Why participating in the Panel is important to customers
  - What has been achieved
  - How customers influence the business priorities and spend from efficiency gains



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## Testing VFM

- Transparency
  - Accountability
- It is about:**
- Cost of service
  - Productivity – what you get out for what you put in
  - Measuring this – quality and quantity



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### VFM is....

- ✓ Relatively low costs
- ✓ High productivity
- ✓ Successful outcomes e.g. Improved performance, reduced costs, increased customer satisfaction, reduced service failures, reduced waste or added value



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### Four ways of achieving efficiency

**Its not about cuts**

- ✓ Put less effort in for the same results
- ✓ Reduce prices for same results
- ✓ Improve results using the same resources
- ✓ Increase your resources for proportionate increase in results



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### Regulatory outcomes for customers

**“Take into account the interests of and commitments to stakeholders, and be available to them in a way that is transparent and accessible”**

- ✓ Look back at last 12 months
- ✓ Look forward and make promises for next 12 months (and beyond)
- ✓ Involve stakeholders in how the efficiencies are spent – (this does not have to be in year)



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### Self Assessment

- ✓ Transparent and accessible to **stakeholders**

**It must**

- ✓ enable stakeholders to **understand the return on assets** measured against the organisation's objectives
- ✓ set out the **absolute and comparative costs** of delivering specific services
- ✓ **evidence the value for money gains** that have been and will be made and how these have and will be realised over time



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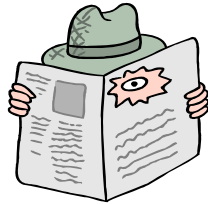
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### You may already be engaged in VFM

- Procurement panels
- Scrutiny panels
- Performance panels
- Restructuring services
- Participatory budgets
- Service Improvement or Focus groups
- Sending in ideas on saving money or reducing waste



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### Practical considerations

- **VFM strategy** – customer involvement
- **Discussions** on shared services
- **Process mapping** – flowcharts can help
- **Right first time** – repairs
- **Benchmarking** – like for like
- ASB **prevention and early intervention**
- Investigating the **private sector offer**
- **Performance - What is measured** - is it for tenants or landlords? What matters? Is action taken?



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### Social Value – others benefit

- Impact of ASB team
- Impact of Homelessness team
- Impact of supporting people team
- Social enterprise
- Education, Police, Fire, local GPs, your communities
- A & E Department, Social Services
- NHS, Social Services, families, other agencies
- Handypersons schemes
- Support into work



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### Courtesy of Plus Dane

- Corporate objective of 40:60 running/doing
- Staff launch
- Tenants forum launch
- Intranet update
- Efficiency mailbox for ideas
- Ideas appraised by finance
- Feedback to staff/tenants



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### Where did efficiencies at Plus Dane come from?

- Procurement of repairs servicing
- Long term void security - buying v renting metal
- Reduced vehicle leasing costs - van sharing
- Centralised travel arrangements and car sharing diary
- Changes to void procedures to reduce time and costs
- Investment in video conferencing to reduce inter-site travel
- Redesign of Job vacancy- creating employment opportunities
- Standardised specification on planned works
- Smarter meeting and catering etiquette



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### Tenants agreed the spend

- Savings not to be spent on what the landlord should be doing anyway - additional spend
- Tenant panel set up to approve expenditure of the efficiency savings
- Formal parameters and approval process set up to ensure probity
- Investment in youth groups, social groups, increased security, cosmetic improvements, Neighbourhood activities


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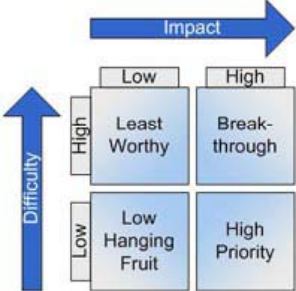

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### Courtesy of Halton HT


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### Courtesy of Blackpool Coastal Homes

| Year    | Mgt Fee (£m) | Satisfaction |
|---------|--------------|--------------|
| 2007/08 | 11.1         | 79%          |
| 2011/12 | 10.7         | 86%          |

- Employee and Board Induction
- Awareness raising at team meetings
- Suggestion scheme
- Tenants Project Fund




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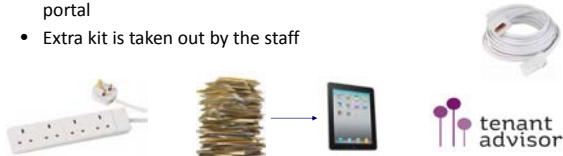
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### Courtesy of Wulvern - Lean Thinking

- Lifeline typically took between 6 and 25 days
- Did not visit 24% of our customers
- Removed 13 spread-sheets and introduced automated reporting and scheduling
- Provided access of customers information whilst mobile for Mobile Support Officers through iPads
- Removed 1700 support plans and introduced a web based portal
- Extra kit is taken out by the staff



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### The NUCHA experience....

- Why participating in the Panel was important to me
- April to September
- 7 tenants
- 2 days training
- 3 meeting days to speak to the senior staff
- Wrote to NUCHA to give our priorities
- Signed off their statement



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### What the VFM Panel asked for

- The current **business plan with the objectives**, to get a feel for the organisations current priorities
- The latest **performance information and anything benchmarking information**
- **Satisfaction survey** results



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### What the VFM Panel did next

Presentation from the 3 senior directors over 3 days:

- Finance
- Housing and support
- Repairs and investment

We asked them to tell us:

- Their priorities for service improvement
- VFM achievements to date on VFM

When they left we talked about what we heard with Yvonne




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### What we liked about NUCHA plans

- Resources of 5% of the budget are to be spent on “social good”
- Ideas that tenants and their relatives would benefit from potential access to the Academy to provide work experience and educational access opportunities
- NUCHA were continuing to build new homes in areas where they had a high proportion of stock
- That Midland Heart lettings scheme was being considered for access to accommodation as a swap
- The on-going improvement and upgrading of homes
- The increase in smaller accommodation being built – which will help those who wish to downsize due to the “bedroom tax”




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### What we achieved

- A review of the services formerly subject to Supporting People LA money and now subsidised by NUCHA (for retirement living schemes) and how this resource might be maximised for the benefit of all tenants
- Review of the usage and access to communal lounges
- Review of the cleaning and gardening services and choice of specification
- Promotion of access to adaptations funding
- How Green technology might be used to reduce fuel bills
- Review of the usage of satisfaction surveys questions and outcomes
- Expensive 0845 number—offered as 0300 number for mobiles
- Push out updates and information on Universal Credit and how this will impact on those affected ( letting people who are not affected know too)




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### NUCHA VFM Panel – what next?

- Our priorities were heard and added to the VFM statement
- NUCHA will have to review their progress on this in September after one year
- We will meet with them again in a series of meetings – to review progress and to agree a way forward for this years priorities
- We will sign off this years statement - due again on 30<sup>th</sup> September 2014



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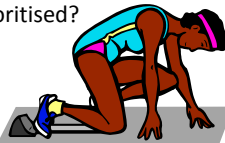
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### Top tips to get you started... find out

- How are company objectives agreed?
- How is future expenditure prioritised?
- How is VFM planned?
- How is VFM delivered?
- How is VFM tested?
- How are customers involved?
- Who is responsible for VFM and how do they demonstrate this?
- Be ready to be asked how you would like to get involved



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### Thank-you - Any questions?



[yvonne@tenantadvisor.net](mailto:yvonne@tenantadvisor.net)

Tel: 07867 974659

Check out the free housing policy advice on:

[www.tenantadvisor.net/blogs](http://www.tenantadvisor.net/blogs)

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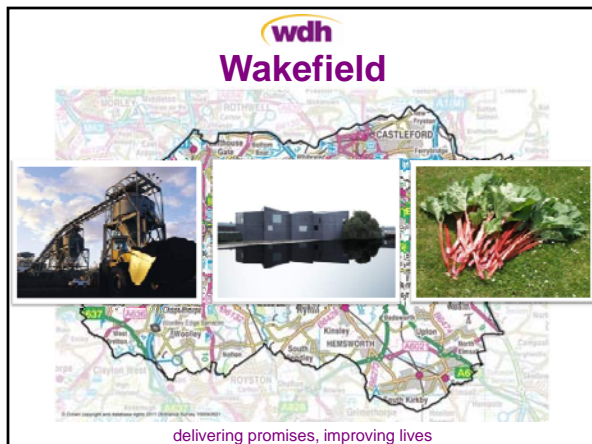
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**wdh**  
**Welfare Reform..!**



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**wdh**  
**'The ones who are crazy enough to think they can change the world...'**



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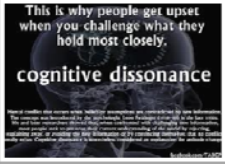
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**wdh**  
**Cognitive Dissonance...!**



- **Government's View** - people are rational beings.
- **Housing View** - change a person's beliefs to change their behaviour.
- **Government's View** - help to re-examine beliefs and develop healthier ways of viewing the situation.

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## The 300 Days...?





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**wdh**

## Direct Payments: A Lesson..!



- £3,300



+ £100

- Over 1,000 tenants have received Direct Payments.
- 400 returned to Direct Payments.
- 77% worsening rent accounts.
- Cumulative arrears £241k.
- Average arrears £130k.
- Three times costs.

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**wdh**

## What did we Learn...!



- Saturation point.
- Each tenant pays their rent differently and is unique.
- Bedroom Tax a 'sting too far'.
- Struggling to cope with personal finance.
- Council Tax the 'silent assassin'.
- Use of Food Banks on the increase.
- Low access to internet.

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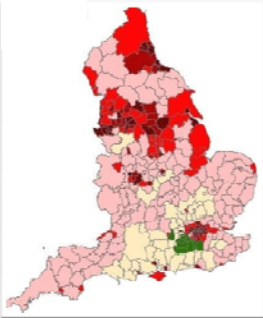
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**wdh**

## The State of the Nation...!



- £81 billion cuts by 2015.
- 500,000 job losses.
- Local services cut.
- 600,000 increase of children in poverty.
- Cost of children in poverty £29 billion.

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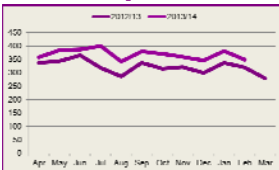
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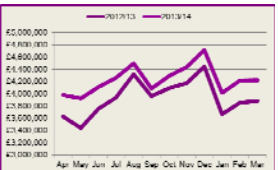
## Resilience or Value for Money...?

### Properties



| Month | 2012/13 | 2013/14 |
|-------|---------|---------|
| Apr   | 350     | 350     |
| May   | 350     | 350     |
| Jun   | 350     | 350     |
| Jul   | 350     | 350     |
| Aug   | 350     | 350     |
| Sep   | 350     | 350     |
| Oct   | 350     | 350     |
| Nov   | 350     | 350     |
| Dec   | 350     | 350     |
| Jan   | 350     | 350     |
| Feb   | 350     | 350     |
| Mar   | 350     | 350     |

### Arrears



| Month | 2012/13    | 2013/14    |
|-------|------------|------------|
| Apr   | £3,500,000 | £3,500,000 |
| May   | £3,500,000 | £3,500,000 |
| Jun   | £3,500,000 | £3,500,000 |
| Jul   | £3,500,000 | £3,500,000 |
| Aug   | £3,500,000 | £3,500,000 |
| Sep   | £3,500,000 | £3,500,000 |
| Oct   | £3,500,000 | £3,500,000 |
| Nov   | £3,500,000 | £3,500,000 |
| Dec   | £3,500,000 | £3,500,000 |
| Jan   | £3,500,000 | £3,500,000 |
| Feb   | £3,500,000 | £3,500,000 |
| Mar   | £3,500,000 | £3,500,000 |

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## Embracing Change!



- Created Debt and Allocations Agencies.
- 24 hour services, cash, advice, lettings, antisocial behaviour.



- 24 hour office hubs, 1,000 mobile workers.
- Community Learning Programmes.

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**The Future...!**



**'in a country where we expect free wi-fi with our coffee, we should certainly demand it on our.....' (estates)!**

**Barack Obama**

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**wdh**  
**The Hub...!**



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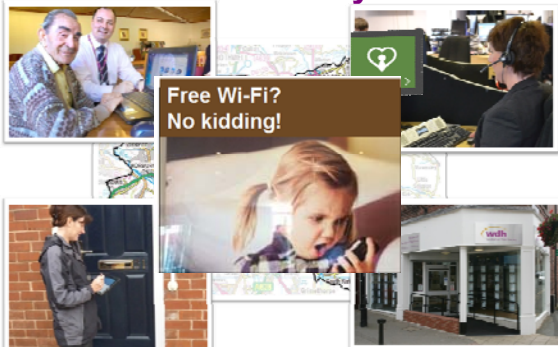
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**Connectivity...!**



**Free Wi-Fi?  
No kidding!**

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**wdh**

## Welfare Reform, the Legacy...?

|   |   |   |
|---|---|---|
| <b>Property</b>   | <b>Place</b>  | <b>People</b>   |
|  |  |  |
| <b>Rent</b>   | <b>Build</b>  | <b>Add Value</b>  |
| ✓   | ✗   | ✓   |

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**wdh**

## Social Rate of Return

|  |   |
|--|---|
| <br><b>Inclusion</b>     | <br><b>Advice</b> |
| <br><b>Inequalities</b> | <br><b>Jobs</b>  |

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**wdh**

## Priorities...!

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|---|---|---|
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**wdh**

## The Game Plan!



Creating confident communities  
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## The Future?

**Vision** creating confident communities **wdh**



2020, 2025, 2030 and beyond...

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**www.wdh.co.uk**

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#nhcri14

# Notes Pages































# Other Information

#nhcri14

## **Taxi Numbers Hilton Hotel, Blackpool**

If you require a taxi for the close of the conference, pre-booking is strongly advised. Please find listed below contact numbers for taxi companies in the area for you to arrange your transport.

**C Cabs** **01253 292929**

**Radio Cabs** **01253 293 222**

**Premier Cabs** **01253 401 000**

**Progress Taxis** **01253 623 411**

#nhcri14



Join the conversation #tenantpanels14

## 4<sup>th</sup> National Tenant Panel Conference

### New and smarter ways of engaging customers

4<sup>th</sup> November 2014 – York Racecourse

Money is tight, so how do we` keep Customer involvement high on the agenda and develop a fresh approach which works. The solution! Housing providers and involved customers must work smarter, in new and innovative ways

#### So what is new?

- ✓ New approaches to customer involvement, regulation, problem solving, and customer influence
- ✓ Advanced approaches to scrutiny and consideration of complaints
- ✓ Customer Panels supporting Boards to review performance
- ✓ Multi agency working in communities
- ✓ Customer training linked to work and education
- ✓ Creative and innovative engagement solutions which work

#### Whatever your involvement panel and strategy– this conference is for you!

This Conference will allow you to attend **at least 3 workshops** to understand what's new and what works.

Hear from experts and customers and network and understand what works for them

#### Who should attend?

New and existing involved tenants and leaseholders, engaging with their landlord on:

- ✓ scrutiny and complaints
- ✓ policy and service development
- ✓ walkabouts, inspections and reality checking
- ✓ performance
- ✓

Any landlord interested in staying ahead of the new agenda, including Directors of Housing, Repairs, & Transformational Change; Policy and Performance, Community and Tenant Involvement Managers and Board Members.

### **Continuing Professional Development**

Delegates will be able to record 5 Continuing Professional Development for attending this conference.

**In the last 3 years, the conference has been a sell-out.....so book your place early and network with the best**

**Registration: 9.30am; Start: 10.00am; Finish: 4.00pm**

### **Delegate fees:**

#### **Book by 23<sup>rd</sup> September 2014 for discounted rates:**

£129+vat for tenants or leaseholders; £179+vat for staff or Board/Elected Members if you are a member of the NHC or SEP/Tenant Advisor and £229+vat for non-members.

#### **Book on or after 23<sup>rd</sup> September 2014:**

£159+vat for tenants or leaseholders; £209+vat for staff or Board/Elected Members for Members of NHC or SEP/Tenant Advisor; £259+vat for non-members of NHC & SEP

### **To book:**

Visit the Northern Housing Consortium website:

**<http://www.northern-consortium.org.uk/Events>**

To unsubscribe from future event mailings please click [here](#).





## Scrutiny and Empowerment Partners Ltd

### Membership Application

|   |
|---|
| <b>Please enrol my organisation into the partnership:</b> |
| Organisation's Name:                                      |
| Name of principal contact:                                |
| Address:  |
| Email:  |
| Telephone:  |

**Membership fees** for housing organisations are £450 + VAT per year for those over 1500 homes, or £250 a year for 1499 homes or less.

Annual membership will cover the following:

- Quarterly newsletters
- Large discounts on conferences, workshops, consultancy and training
- Members access to good practice case studies & guidance
- Members website for sharing scrutiny & involvement reports
- Discounted consultancy and training fees
- Networking events for tenants, twice a year
- Networking meetings for staff, sharing of good practice and guest speakers, quarterly.
- Free Access to telephone support and advice

|                          |  |
|--------------------------|--|
|                          | <b>Ways to pay</b> (please tick and complete your choice of payment method)  |
| <input type="checkbox"/> | This is an application for free membership for the first year  |
| <input type="checkbox"/> | Enclose a cheque, made payable to Scrutiny and Empowerment Partners Ltd.   |
| <input type="checkbox"/> | Please invoice for £_____ plus VAT<br>Optional Purchase Order reference _____<br>Invoice address and contact (If different from above) |

**Please send your completed form to:**

**Scrutiny and Empowerment Partners Ltd,  
11 Hope Place, Liverpool,  
L1 9BG**

**Or by email to:**  
[yvonne@tenantadvisor.net](mailto:yvonne@tenantadvisor.net)

**Query? Call us on:**  
**07867974659**

**The Partnership** offers a range of good practice and tools to help tenants and landlords to enhance local scrutiny arrangements.

Initially we set up the membership to support Scrutiny, co-regulation and all forms of Involvement. For the last 2 years we have also shared information and deliver support services on Complaints; Governance; Value for Money; Regulation; Equality; Service Audit; Service Reviews and Restructures.

If you have any ideas for further enhancing the services, please use this box to provide that information and we will endeavour to please.

**How did you hear about us?**

**Conditions of membership**

Please note that access to network membership is for:

- ✓ Individual organisations (or groups),
- ✓ Staff employed by those organisations (or groups).
- ✓ Tenants, Board Members and Councillors

Members must not share any member benefits with other organisations who are not partnership members. This would devalue the benefits of membership for paying members. Sharing the password and the forwarding briefing papers or other documents to non-member organisations is prohibited.

One member from your organisation will be able to drag and drop information onto your page, to enable sharing of data and best practice. Other members in your organisation will have read only access. Offensive material will be removed.

We reserve the right to terminate membership of the partnership in cases of a breach of these conditions of membership.

**Thank you, we look forward to working with you.**

## Popular Training Courses for Scrutiny and Involved Customer Groups 2014



All courses are one day, usually 10am to 3pm

|    | Suggested Courses   |
|----|---|
| 1  | Where to find facts and how to scrutinise them  |
| 2  | Assessing service strengths and area for improvement – making balanced judgements   |
| 3  | Scrutinising performance and benchmarking data  |
| 4  | Equality and Diversity, involving and engaging with local representative groups   |
| 5  | Report writing and practice   |
| 6  | Presentation skills and practice  |
| 7  | Co-regulation - what is expected of involved customers and landlords under Regulation and Localism  |
| 8  | The Big \picture:<br>Where does housing services fit with Government priorities and what is happening in related fields of social care, planning and house building |
| 9  | Interviewing skills – holding 121 and focus group discussions with experts, staff and tenants   |
| 10 | Mystery Shopping, tenant surveys and reality checking services  |
| 11 | Negotiating and influencing skills  |
| 12 | Complaints and feedback forms – what to look for, what to analyse and how to approach this  |
| 13 | Researching and reviewing good practice – would it suit us?   |

|           |  |
|-----------|--|
| <b>14</b> | <b>Managing meetings and projects for success</b>  |
| <b>15</b> | <b>Writing newsletters people want to read</b>   |
| <b>16</b> | <b>Project and event management techniques</b>   |
| <b>17</b> | <b>Communications and Relationship Management between Customer Groups and with your landlord</b>         |
| <b>18</b> | <b>Effective action plans – what to look for and how to review progress</b>                              |
| <b>19</b> | <b>Managing budgets and grant funding</b>  |
| <b>20</b> | <b>Choosing an area for scrutiny or service review and scoping the project</b>                           |
| <b>21</b> | <b>Value for money – what is it and how can we engage?</b>   |
| <b>22</b> | <b>Appraisals for residents and tenant board members – different approaches</b>                          |
| <b>23</b> | <b>Complaints changes under Localism and the role of designated persons</b>                              |
| <b>24</b> | <b>Different roles for tenants in complaints management and stakeholder management</b>                   |
| <b>25</b> | <b>Shall we have an internal or external Tenant Complaints Panel?</b>                                    |
| <b>26</b> | <b>Data Protection and confidentiality</b>   |
| <b>27</b> | <b>Pulling together project findings and reporting on these</b>  |
| <b>28</b> | <b>Recruiting newly involved volunteers – taster sessions</b>  |
| <b>29</b> | <b>Governance -Different roles of tenants working with the Board/Council Committee</b>                   |
| <b>30</b> | <b>Role descriptors and positions on involved residents groups</b>                                       |
| <b>31</b> | <b>Social Housing Regulation and co-regulation – what is expected?</b>                                   |
| <b>32</b> | <b>Election of chair., vice chair, coordinators and other positions on committees and best practices</b> |

|           |   |
|-----------|---|
| <b>33</b> | <b>An introduction to scrutiny, the skills you need to learn and what is involved</b>             |
| <b>34</b> | <b>Building a team of involved customers</b>  |
| <b>35</b> | <b>Reviewing your customer engagement</b>   |
| <b>36</b> | <b>Advanced Scrutiny – deeper diving and polishing your skills</b>                                |
| <b>37</b> | <b>Scoping a service review and planning to deliver to a timetable</b>                            |
| <b>38</b> | <b>Partnership Working across all customer groups for mutual interest and without duplication</b> |
| <b>39</b> | <b>New groups – what is our purpose and how will we achieve this</b>                              |
| <b>40</b> | <b>Tenant Cashback – how to set up your pilot</b>   |
| <b>41</b> | <b>Complaints – Internal tenant Panels – best practice</b>  |
| <b>42</b> | <b>Complaints – staff training</b>  |
| <b>43</b> | <b>Complaints – Designated Panels – forming a plan</b>  |
| <b>45</b> | <b>Designated Panels - skills training for new tenant groups</b>                                  |
| <b>46</b> | <b>Designated persons – role of Councillors and MPs</b>   |
| <b>47</b> | <b>Chairing skills and skills for other tenant groups</b>   |
| <b>48</b> | <b>Cross landlord shared services and skills for tenant involvement</b>                           |
| <b>49</b> | <b>Linking involvement and routes to work and training</b>  |
| <b>50</b> | <b>Tenant Board Member training – what do I do and why is this different from involvement?</b>    |

Contact [Yvonne@tenantadvisor.net](mailto:Yvonne@tenantadvisor.net) or phone 07867974659

And join up for our newsletters and news on [www.tenantadvisor.net](http://www.tenantadvisor.net)



# Evaluation Form

Thank you for attending today's workshop. In order to help make our future events even better, we would really appreciate it if you could take a couple of minutes to complete this evaluation form.


| 14 <sup>th</sup> Annual Resident Involvement Conference<br>5 <sup>th</sup> and 6 <sup>th</sup> June 2014 |                                      |
|--|--------------------------------------|
| Name   | Job Title                            |
| Organisation   | E-mail                               |
| How did you find out about this event (please tick)  |                                      |
| Flyer <input type="checkbox"/>   | NHC Website <input type="checkbox"/> |
| Colleague <input type="checkbox"/>   | Email <input type="checkbox"/>       |
| What was your reason for attending today's event?  |                                      |
|  |                                      |
| Have your objectives for the day been met?   |                                      |
|  |                                      |
| What did we do well?   |                                      |
|  |                                      |
| What could we improve?   |                                      |
|  |                                      |

| What did you think of the conference venue? (please tick) |                   |   |   |   |   |   |   |   |   |    |                |
|---|-------------------|---|---|---|---|---|---|---|---|----|----------------|
|   | Very dissatisfied |   |   |   |   |   |   |   |   |    | Very satisfied |
|   | 1                 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                |
| Location, accessibility, parking etc                      |                   |   |   |   |   |   |   |   |   |    |                |
| Main Conference Room                                      |                   |   |   |   |   |   |   |   |   |    |                |
| Workshop Session Room(s)                                  |                   |   |   |   |   |   |   |   |   |    |                |
| Catering  |                   |   |   |   |   |   |   |   |   |    |                |
| Accommodation (if applicable)                             |                   |   |   |   |   |   |   |   |   |    |                |

| If you weren't satisfied with any of the conference venue, please tell us why |
|---|
|   |

| What did you think of our speakers? (please tick)             |                   |   |   |  |   |   |   |                |   |    |
|---|-------------------|---|---|--|---|---|---|----------------|---|----|
|   | Very dissatisfied |   |   |  |   |   |   | Very satisfied |   |    |
| Speakers  | 1                 | 2 | 3 | 4  | 5 | 6 | 7 | 8              | 9 | 10 |
| <i>Chair: Nigel Wilson</i>                                    |                   |   |   |  |   |   |   |                |   |    |
| <i>Chair: Irene Bailey</i>                                    |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 1: Graeme Foster</i>                               |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 2: Tony Bryan</i>                                  |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 2: Jon Mallen-Beadle</i>                           |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 3: Shontal Theatre Performance</i>                 |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS1: Dean Slavin/ Ben Harrison</i>                        |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS2: Tracy Jagger/ Stewart Barnes</i>                     |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS3: Susan Borrow / Khailah Wilson / Nathan Henderson</i> |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS4: Andrew Wilson</i>                                    |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS5: Antony Jarvis / Jennifer Gore</i>                    |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS6: Natalie Pryor / Shiela Fitzpatrick</i>               |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS7: Jonathan Cannon</i>                                  |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS8: Susan Borrow / Khailah Wilson / Nathan Henderson</i> |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS9: Andrew Wilson</i>                                    |                   |   |   |  |   |   |   |                |   |    |
| <i>PPS10: Antony Jarvis/ Jennifer Gore</i>                    |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 4: Gwyn Gascoigne</i>                              |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 5: Tom Manion</i>                                  |                   |   |   |  |   |   |   |                |   |    |
| <b>Day 2</b>  |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 1: Mike Biles</i>                                  |                   |   |   |  |   |   |   |                |   |    |
| <i>Sub Plenary 1: Ian Alderson</i>                            |                   |   |   |  |   |   |   |                |   |    |
| <i>Sub Plenary 2: Yvonne Davies</i>                           |                   |   |   |  |   |   |   |                |   |    |
| <i>Sub Plenary 2: Kevin Haughian</i>                          |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 2: Steve Rawson</i>                                |                   |   |   |  |   |   |   |                |   |    |
| <i>Plenary 3: Iain Sim</i>                                    |                   |   |   |  |   |   |   |                |   |    |

**If you have ticked 1 - 4 for any above please tell us why**

| Please indicate your level of overall satisfaction with the event |   |   |   |   |   |   |                |   |    |  |
|---|---|---|---|---|---|---|----------------|---|----|--|
| Very dissatisfied   |   |   |  |   |   |   | Very satisfied |   |    |  |
| 1   | 2 | 3 | 4   | 5 | 6 | 7 | 8              | 9 | 10 |  |
|   |   |   |   |   |   |   |                |   |    |  |
|   |   |   |   |   |   |   |                |   |    |  |



**The Northern Housing Consortium value your opinions; would you please indicate if you give us permission to use your comments in our future marketing literature**

Yes

No

**At the Northern Housing Consortium we like to find out how our events benefitted delegates; please indicate if you give us permission to contact you in the future to find out how you found our event**

Yes, my email address is:

No

**Thank you for taking the time to complete this evaluation form.  
Please leave your form at the registration desk or hand it to a member of the Consortium staff before you leave.**

#nhcri14