

## WELFARE REFORM SCRUTINY REVIEW

### April-May 2013

#### Introduction

This review focussed on how Soha has responded to the Welfare Reform changes announced by Her Majesty's government. It looked at how Soha was informing and helping those tenants who would be affected and also how it was protecting the organisation from financial and reputational damage. This review focussed on the decisions and performance to date and at lessons learned for future changes to benefits.

It looked at three key areas.

- 1) The overall impact welfare reform will have on Soha and its tenants (including the impact on different groups).
- 2) How has Soha approached the changes due immediately.
- 3) What plans are in place for future changes.

The group undertook training about welfare reform from Engage Associates and have received regular updates from this organisation and HQN.

The group conducted extensive interviews with staff, from Director level to staff in direct contact with tenants, the Tenant Forums' Welfare Reform Champion and two members of staff from South Oxfordshire District Council.

#### HEADLINE FINDINGS

The Scrutiny Group has found that Soha has actively been looking at the changes and assessing their possible impact on both the business and tenants from the time they were first announced. They have understood that by helping tenants they will be helping the business.

This forward planning seems to have better equipped Soha to deal with this than many other organisations. There is external evidence of this from comments made at the interview with Council representatives.

The group found no indication that tenants are blaming Soha for the changes they are experiencing. This could be because of the clear and helpful letters and leaflets produced for those who will be most affected by these changes.

#### CHANGES IN APRIL

Soha has been very proactive in its contact with residents and this was confirmed by the figures produced by the Rental Income Team. Soha knew that 284 tenants would be affected by the so-called 'bedroom tax' from April 2013.

Soha checked its figures against those of SODC and contacted people individually and got responses from a large majority of those affected. The majority (170) said they would make up the difference themselves and they were encouraged to apply for Discretionary Housing Payment (DHP).

There is evidence that tenants have been helped e.g. with offers of other accommodation and it would seem that Soha has 'bent over backwards' to help people and prepare them for what is going to happen.

## FUTURE CHANGES

The Group would like to revisit this in 2014 as there are still many unknowns and changes may well be made by government. Within a week of the group completing its interviews with Soha and SODC the pilot projects for Universal Credit had been moved back.

## DETAILS of REPORT

1. Soha reacted quickly to the announcement of Welfare Reform recognising the likely impact on both Soha and its tenants. Both the Board and the Tenants' Forum had this on their Agendas in early 2012.
2. A tenant group, called the Sounding Board, was set up to look at the tenant experience and a staff group to work on policies and procedures. These groups met regularly and influenced the Welfare Reform Strategy which was taken to Forum and Board.
3. A member of staff was appointed to start work on the under occupation part of welfare reform, the so called 'bedroom tax'. The information Soha holds on its tenants was searched and cross checked with that held by SODC. After completion of a survey a total of 284 households have been identified as being affected - 228 being under occupying by 1 bedroom and 56 by 2 bedrooms.
4. Soha has used very varied ways to communicate with those affected – phone, cards, text and radio. At the point the group carried out its interviews 38 had still not responded and home visits were planned. Some of these tenants already had rent arrears and it was felt that they were deliberately avoiding contact.
5. The Welfare Reform Champion had been talking to tenants and monitoring the website. The Group asked if she had any reason to think that Soha was being blamed for this situation by tenants but she had no evidence of this. She had contact from Soha tenants and tenants of other organisations following an interview she did with the Oxford Times as part of the campaign.

6. The Group was informed by SODC that at present when assessing family size they do not take a new baby into account until it is six months old. They are planning to change this to the birth date but this will not be going to the Council's Cabinet for agreement until May. When processing DHP applications the Council does not make any allowances for expected changes in family size.
7. SODC had received information that the new centralised system for Universal Credit claims due to come into force in October has some problems and systems may not all be in place. The Council was more concerned by the lack of private rented accommodation as tenants who get into difficulties and are evicted will turn to them for accommodation.
8. In regard to DHP, the fund had increased this year by £60,000. There had been 34 applications to SODC this year, not all from Soha, but the number of applications was expected to rise significantly. At the time of the scrutiny review, three Soha tenants had had their applications refused and two applications had been accepted.
9. The case of tenants wishing to downsize from properties with adaptations funded from the DFG (Disabled Facilities Grant) would have to be carefully considered by both Soha and SODC on individual basis.
10. The Group was pleased to hear from SODC that it felt Soha was far ahead of other organisations it dealt with in communicating changes to tenants.
11. The Group recognised that this report deals mainly with the 'bedroom tax' part of Welfare Reform. Still to come are PIP and Universal Credit which will have a much bigger impact on a larger section of the community. The Group would like to look at this again but recognise that sufficient time will need to elapse for the affects to be properly judged so this will not be until 2014.

## RECOMMENDATIONS

The Scrutiny Group commends Soha for its response to Welfare Reform so far. The Group is unable to find any areas where it thinks improvement is needed.

As the situation develops the Group asks Soha to keep the situation under close review and recommends that senior managers talk to other Registered Providers to make sure that Soha is up to date with best practice.

The Group requests that Soha provides an update on Welfare Reform and its impact on tenants at the Group's February 2014 meeting.

## Methodology

This review was carried out using the following information and activities:

- Training by Engage Associates
- Information and updates from  
Engage Associates  
HQN  
CIH  
IPSOS MORI  
Board KPIs  
Soha staff training reports
- Interviews with  
Richard Peacock, Chief Executive  
Maureen Adams, Director of Customer Services and Operations  
Tom Mason, Rental Income Team  
Ann-Marie O'Sullivan, Portfolio Holder, Welfare Reform, Tenants'  
Forum  
Teresa Gowers, Service Manager  
Chris Irons, Communications and Resident Involvement Manger  
Lyn Scaplehorn, Vale of White Horse & South Oxfordshire District  
Council  
Phil Ealy, Vale of White Horse & South Oxfordshire District Council