



## Report to Customers and Communities Committee

27 February 2014

**Title:** TALISMAN – Progress Report

**Report of:** Managing Director

### Purpose of Report

1. To provide the committee with an update on progress against actions identified in the first two TALISMAN reviews and provide a general update on the panel.

### Background

2. TALISMAN (Tenant and Leaseholder Scrutiny Management Panel) was established in October 2011. This followed an extensive project working with Wood Holmes and Gentoo to consider the opportunities for an independent tenants' organisation in Gateshead.
3. The purpose of the Panel is to ensure that the needs and views of Gateshead residents are at the heart of how housing services are developed and delivered by The Gateshead Housing Company and Gateshead Council.
4. The first review of anti-social behaviour took place between January and June 2012. The Panel's recommendations were presented to this committee in July 2012 and the action plan to address the recommendations was presented to this committee in November 2012. The committee also received a progress report in May 2013 where it was noted that the majority of actions were complete.
5. The second review of rent and income took place between March and September 2013. The Panel's recommendations were presented to this committee in September 2013 and the action plan to address the recommendations was presented to the last meeting of this committee in November 2013.
6. The third review of void management is currently progressing and it is anticipated that the Panel will present its recommendations to the next meeting of this committee in May 2014.
7. The committee received an update on activity of the Panel at its meeting in February 2013.
8. The committee requested at its last meeting in November 2013 that it receives a six monthly update on progress on completing actions identified from reviews.

## Scrutiny Reviews - Progress completing actions

9. As previously report, most of the actions following the review of anti-social behaviour had already been completed when the updated action plan was presented to this committee in May 2013. Of the only outstanding actions, the following progress has been made: -
- Surveys/sample sizes – A review of our current approach to surveys was provided in a previous report to committee. This included looking at best practice from other organisations around sample sizes and methods of satisfaction collection. In 2013/14, it has been noted that response rates to a number of surveys has fallen. As a result, we will be revisiting this issue in the next financial year to determine if the approach of themed and service specific surveys continues to be the most appropriate way of collecting customer satisfaction information.
  - Collect and report data to SIG for monitoring on length of time taken to resolve ASB cases – This action requires ICT development within our ASB case management system. This is an outstanding action from 2013/14 service plan which will transfer to the 2014/15 service plan. This item is also on the SIG workplan for 2014/15. As an interim measure we will be capturing data manually.
  - Share Housemark data and work with SIG to benchmark – This was discussed with SIG as part of 2013/14 workplan, and included performance, satisfaction and costs. A presentation was also provided by the business support officer; benchmarking will continue on the SIG's workplan for 14/15.
10. The committee received the action plan following the review of rent and income at its last meeting. Since that meeting, the Panel raised some concerns with the service manager and the action plan has been updated. A number of the actions are now complete and the updated action plan is attached at Appendix 1 to this report.

## Other Updates

11. Since the last update on the activity of the Panel, a further five members have been appointed. The new members have received comprehensive training prior to starting their first review with the existing members around void management.
12. During the last update it was reported that the number of panel members had reduced due to a combination of factors. Since then, Sheila Bouitieh and Helen Hall have been appointed onto the Board as Tenant Directors and very recently Hazel Hitchen has also resigned. In addition, one of the new members also resigned due to no longer being a tenant with Gateshead Council. This therefore has resulted in there now only being five members remaining.
13. A further recruitment campaign has been carried out with a taster session taking place on 24 January 2014. Eight tenants who currently serve on service improvement groups attended the session. The closing date for applications was 7 February 2014 and two applications were received. Both applicants have been shortlisted for interview which will be held in early March 2014.
14. Members of the Panel have attended a number of events during the last year which has enabled them to network with other scrutiny panels and to develop their skills and knowledge. These have included a two day Tenants Futures

event in Chester and two NHC events, its Annual Conference and an event around welfare reform.

15. Members of the Panel have had their first personal development reviews with the Independent Mentor and training needs will be addressed during the next few months. This includes basic ICT training, report writing and a better understanding of finance and hot topics at the moment in the sector.
16. Following the review of rent and income, the panel discussed the process undertaken and identified that communication between the service under scrutiny and the panel could be improved. This has led to introducing a step to ensure that the service manager meets with the panel to discuss their proposed action plan prior to this going to committee. This and other lessons learnt are reflected in the flowchart attached at Appendix 2 showing the process to be followed for all future reviews.
17. Since this review, a dedicated secure website for TALISMAN has also been developed. This is used by the Panel to share and discuss information during the reviews and to provide a central point for all documents and information to be stored so that all members have access even if they are not involved in that particular activity. The website has made communication between members, (and with the company) much more effective. There is also an obvious cost saving in not requiring printing hard copies of all documents to provide to the Panel.

#### **Link to values**

18. This report relates to the following company values: -
  - Being customer focused, innovative and professional
  - Being a listening and learning organisation
  - Being honest, accountable and transparent
  - Embracing equality

#### **Impact on tenants**

19. The overall aim of the TALISMAN is to ensure that the needs and views of Gateshead residents are at the heart at how housing services are delivered.
20. The work of the TALISMAN has already identified areas for improvement during the first two reviews which will benefit tenants and leaseholders as a whole.

#### **Risk Management Implications**

21. Failure to engage with tenants has been identified as an overall strategic risk for the company. The TALISMAN builds on the existing structures in place for tenants and leaseholders to shape services and influence our delivery.
22. Feedback and monitoring of responses to recommendations following a review by the TALISMAN is fundamental to ensuring that tenants feel they are being listened to, encouraging their ongoing engagement.

23. The TALISMAN supports the company's overall approach to co-regulation as set out in the Homes and Community Agency's regulatory framework.

### **Financial Implications**

24. There is a budget in place to support the operation of TALISMAN. Where recommendations are made which have budgetary implications they would be considered on a case by case basis.

### **Equality and Diversity Implications**

25. TALISMAN's code of conduct includes specific expectations relating to equality and diversity. All new members of the panel will either attend a full day training session or undertake the company's e-learning course to give them a level of understanding.
26. In addition, the framework for each review includes consideration as to whether the service is inclusive.

### **Value for Money Implications**

27. The TALISMAN's framework for reviews includes a remit to consider value for money within the services they inspect.

### **Health Implications**

28. The reviews undertaken by the TALISMAN will ultimately result in positive health implications for tenants and leaseholders accessing the service. The TALISMAN have recognised that where it is difficult to use a service, or the information provided is unclear, this can lead to undue stress and concern for a customer.

### **Environmental Implications**

29. There are no direct environmental implications associated with this report.

### **Consultation carried out**

30. Each review will involve significant consultation with the service manager, service users, employees and possibly partners to determine how well the service is performing.
31. In addition, the TALISMAN is consulted on the proposed responses to recommendations by the service area to allow negotiations where necessary.

### **Recommendation**

32. The views of the committee are sought on the progress completing the actions identified following the recommendations from the first two TALISMAN reviews and the other progress made.

**Service Feedback to committee on TALISMAN recommendations**

Service Area	Rent and Income				
Date of response to committee	November 2013				
Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update	
<p><b>Leaflets</b> In two housing offices, old leaflets were found amongst the newer versions</p> <p><i>Recommendation: Regular checks to ensure that leaflets are always up to date</i></p>	<p>The Rent and Income Manager will discuss with the Communications Manager how best to ensure leaflets are kept up to date and checked on a regular basis.</p>	<p>J Graham (RAIT) and I Clarkin (Comms)</p>	<p>Complete: November 2013</p>	<p>Complete November 2013</p>	
<p><b>TGHC Website: Rent and Income pages</b> Language used was considered to be negative and repetitive. The home page was mainly negative with very few positives. Tenants who are financially vulnerable find it difficult to discuss their finances so the issue of confidentiality should be paramount. This wasn't made clear on the website.</p> <p>Different computer operating systems such as tablets can make it difficult to</p>	<p>The TGHC website has recently been re-designed and some of the out-dated content and broken links have been removed/fixed.</p> <p>The content will be reviewed and shared with the Allocations and Rents SIG to ensure the information is both accessible and accurate.</p> <p>Once checked the RAIT team will review the rent related website content on a quarterly basis. The initial check will be carried out in</p>	<p>E Metters and J Forrester (RAIT)</p>	<p>Content Reviewed by March 2014</p> <p>Reviewed quarterly from June 2014</p>	<p>Review is ongoing and is scheduled to be completed by the end of March 2014.</p>	

Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update
<p>access information from some websites.</p> <p><i>Recommendation:</i> TALISMAN understands that since this exercise was carried out the website has changed so the recommendation would be to revisit this section's wording and check links.</p>	<p>March 2014 in preparation for next financial year.</p>			
<p><b>Letter from Gateshead Council</b> During the mystery shopping exercise, nine customers felt that the initial letter from Gateshead Council sent out in March 2013 was difficult to understand in three areas (see mystery shopping report at Appendix 3)</p> <p><i>Recommendation:</i> Gateshead Council be asked to take into consideration these comments when producing future letters around Welfare Reform</p>	<p>This letter comes under the remit of Gateshead Council and the content has been discussed with them. The letter is a system generated letter which contains a large amount of information set out in statute. The ability to manipulate stock letters is also limited due to system limitations.</p> <p>However, Gateshead Council do keep their letters under review and are keen to make them as user friendly as possible. – our role is to influence</p>	<p>J Graham (RAIT)</p> <p>H Paine (Benefits)</p>	<p>Complete: November 2013</p>	<p>Housing benefits have agreed to add an insert which will inform tenants of their benefit entitlement, rent charge and what their payable rent will be. 5/2/14</p> <p>Another example of collaborative working is that the Discretionary Housing Payment decision letter was recently amended following feedback provided by TGHC.</p>

Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update
<p><b>Arrears Intervention</b> TALISMAN felt that information around arrears information was too negative and there was too much emphasis on the escalation process.</p> <p><i>Recommendation: More positive information about arrears intervention</i></p>	<p>The Rent and Income Manager will discuss rent arrears information with the Communications manager to ensure that a more positive outlook is presented where possible. We will endeavour to produce more good news stories related to Rent.</p> <p>Only recently a story about our clear rent account prize drawer winners was publicised in the quarterly newspaper.</p>	J Graham and I Clarkin	January 2014	Complete January 2014
<p><b>Tenancy Agreement</b> The Tenancy Agreement has not been updated since 2008 and needs updating to reflect Welfare Reform and its impact on tenants.</p> <p><i>Recommendation: Review of Tenancy Agreement needs to reflect Welfare Reform and its impact on tenants.</i></p>	<p>The Tenancy Agreement is currently under review and the Rent and Income Service will play a part in this process to ensure that all rent related aspects are covered sufficiently.</p> <p>Welfare Reform and its impact on tenants will also be included in any new tenancy documentation.</p>	J Graham (RAIT) and T Smare (Housing Management)	March 2014	<p>Review of tenancy agreement is ongoing- the RAIT service is involved in the process. 5/2/14</p> <p>One example is adding the number of bedrooms onto the tenancy agreement form, which would assist during benefit appeals.</p>
<p><b>Rent Card – Sign Up</b> The review found that in some cases, it wasn't made clear to new tenants during the sign up that they needed to</p>	<p>The sign-up procedure has recently been reviewed and the rent and income service played a significant part in this.</p>	J Graham (RAIT) and K Roberts (Housing	January 2014	Sent a reminder to cashiers to ensure Council Tax is not being

Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update
<p>ask for a separate card to pay for their Council Tax and that it could not be paid on the rent card. TALISMAN found four examples where summonses had been sent to tenants because they had mistakenly paid their rent and Council Tax together on the same card.</p> <p><i>Recommendation:</i> Make it clear to new tenants during sign up that Council Tax cannot be paid on rent card.</p>	<p>The new process is far more robust in relation to rent and housing benefit matters and more emphasis is put on ensuring the new tenant knows both what to pay and how much they need to pay.</p> <p>However the RAIT manager will discuss confusion around Rent and Council Tax payment cards to investigate what can be done to improve clarity.</p>	management)		paid on Rent accounts. 5/2/14
<p><b>Service Improvement Group (SIG)</b> There was currently no SIG for rent and income. The establishment of a Rent and Income SIG allowing for regular customer engagement on the service. This also means that customers are not involved in the process for setting targets for the year as is the case in other service areas.</p> <p><i>Recommendation:</i> The establishment of a Rent and Income Service Improvement Group.</p>	<p>SIGs have recently been reviewed and a decision taken not to have a dedicated Rent and Income SIG, however the Rent and Income Manager frequently attends other SIGs to give updates on rent related matters.</p> <p>Only recently a focus group with tenants was held to discuss a new style rent statement, so the RAIT service do consider tenant involvement an important part of service management.</p> <p>We recognise that more regular customer involvement would be beneficial for the service.</p>	J Graham (RAIT)	February 2014	First joint lettings and rent SIG was conducted on 28/1/14- the SIG agreed to the amalgamation and RAIT will continue to attend this SIG to discuss issues and agree performance targets. 5/2/14

Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update
	<p>We will therefore join the Tenancy and Allocations SIG. Terms of reference will be amended to reflect this.</p> <p><i>The establishment of a stand alone rent and income service group will be considered when SIGs are next reviewed.</i></p>			
<p><b>Timing of Surveys</b> Surveys had been sent to tenants just after the rent increases which could result in a negative response from tenants.</p> <p><i>Recommendation: Better consideration of all relevant factors before determining when to send out surveys.</i></p>	<p>The rent survey is posted with the quarter 1 rent statement. This survey is 4 months after the rent increase letter is received by tenants.</p> <p>In order to allow for effective comparison the survey is posted out at the same time each year.</p> <p>However, the opportunity to look at this recommendation again will be taken when the survey methodology is next reviewed.</p>	J Graham	Complete November 2013	Complete November 2013
<p><b>Young People</b> The Rent and Income Team tried hard to engage with young people but more work should be done to ascertain what other organisations were doing.</p> <p><i>Recommendation: Identify good practice from other organisations when engaging with young people.</i></p>	<p>The rent and income team work hard to sustain all tenancies and put particular emphasis on under 25's.</p> <p>The Rent and Income manager will ensure that Young People and tenancy sustainment is on the agenda of the next Northern benchmarking group meeting that is held. This will enable TGHC to identify good practice from other organisations.</p>	J Graham	February 2014	Ongoing- The last Northern Benchmarking group was held Oct 2013. The Rent and Income Service Manager will attend the next meeting to discuss good

Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update
				practice around young people and tenancy sustainment.
<p><b>Performance Report</b> Some targets were reduced for the next year, however it wasn't made clear in the narrative of the performance report that this had happened or the rationale for reducing them.</p> <p><i>Recommendation: Narrative in performance report make it clear when a target has changed for the next year and the rationale behind the change</i></p>	<p>The rent and income manager will endeavour to make it clear the rationale for any changes in performance targets.</p> <p>Performance targets are set around February/March each year and any explanation for amendments will be included on performance reports.</p> <p>The RAIT manager will discuss this issue with the performance team as this could be an issue for other services.</p>	J Graham	April 2014	<p>Performance targets for 2014/15 are in development and will be discussed with the SIG prior.</p> <p>Individual targets and service standards are also in development. 5/2/14</p>
<p><b>Target Setting</b> TALISMAN were concerned that the Rent and Income Manager set all the targets without the involvement of the managers within the service or front line employees.</p> <p><i>Recommendation: More involvement of other staff in target setting for them to take ownership and understand how their role contributes to the overall performance of the service.</i></p>	<p>The rent and income management team meet on a monthly basis to discuss all aspects of the service, one of which is performance.</p> <p>These meetings inform decisions on performance setting and these targets are discussed with the RAIT management team during appraisals and 1-2-1's.</p> <p>Greater emphasis will be placed on the input the team have on the target development and setting for 2014/15.</p>	J Graham	March/April 2014	<p>Performance targets are in development for 2014/15. 5/2/14</p>

Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update
	Discussions around target setting will also be taken to the Allocations and Rents SIG.			
<p><b>Sharing of Good Practice</b> TALISMAN felt that in order for teams to share good practice with each other there should be a standing item on all team meeting agendas as this appears to happen on an ad hoc basis.</p> <p><i>Recommendation: Standing item around sharing of good practice on team meeting agendas.</i></p>	<p>This recommendation is something that has recently commenced within the service. During the Wednesday afternoon briefing sessions all employees are given an opportunity to share good practice or indeed express concerns they have.</p> <p>These issues are discussed and brought to the attention of the management team. The service as a whole will also be coming together on a regular basis to share thoughts and issues as a team.</p>	J Graham	Complete November 2013	<p>Complete November 2013</p> <p>The RAIT team continue to meet on a regular basis to discuss issues and share good practice. 5/2/14</p>
<p><b>Publicising of Service Standards</b> TALISMAN found two instances where service standards were different in some documents.</p> <p><i>Recommendation: Ensure that service standards are the same in all documents</i></p>	<p>The rent and income manager will review both the service standards and documents they are published in when the standards are reviewed at the end of the year.</p> <p>The RAIT Manager checked the service standards document and it accurately reflects the standards. However checks will be made to ensure all documents/publications have the same information in.</p>	J Graham	March 2014	Planned for March 2014

Recommendation	How is this to be implemented? (or if it cant be explain the reasons for this including any further discussions with TALISMAN)	Lead service	Target date for completion	Progress update
<p><b>Training</b></p> <p>Training was discussed with managers and front line employees and highlighted that some training has been provided to existing employees although there were some gaps.</p> <p><i>Recommendation: Conflict and resolution training needs to be provided as soon as possible for new employees during induction. There should be a consistent induction plan for new employees prior to them undertaking the role rather than this varying for each employee.</i></p>	<p>Training is important and each team members training needs are addressed through appraisals and 1-2-1's.</p> <p>Conflict and resolution training has been given to every member of RAIT in early August as this was seen as imperative for the role of the rent and income team.</p> <p>The Rent and Income Manager has recently met with HR to discuss a consistent induction plan for new employees to ensure all staff are offered the correct training prior to undertaking the role. This should be rolled out in the near future.</p>	<p>J Graham and P Lamming (HR)</p>	<p>February 2014</p>	<p>Training requirements for each job role were confirmed in Jan 2014.</p> <p>Training is ongoing.</p> <p>Sessions recently have included briefings about Local Discretionary payments and from the local credit union. 5/2/14</p>

TALISMAN Reviews

