

Local offer trailblazers - from planning to practice



TSA

THE SOCIAL
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Local offer trailblazers – from planning to practice

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Foreword

Social housing regulation is changing. The recommendations of the Government's review of regulation and the Localism Bill emphasise the need for providers to work locally with tenants to agree how services will be provided and to strengthen the accountability of landlords to their tenants for the quality of the services they provide.

It is not the social housing regulator's job to explain or prescribe the detail of how landlords and tenants should work together to achieve this. The standards that we published in April 2010 and our requirements for providers to make local offers made this clear.

In November 2009, we commissioned 39 local offer trailblazers with the objective of providing the opportunity for providers and tenants to work together to develop approaches to local offers, based on our principles of co-regulation. Our objective for this project was not to produce guidance or prescription but to enable providers and tenants to pioneer new ways of working together and to share that experience and learning with other providers and tenants.

This is the second report on local offer trailblazers that we have produced. It provides an overview of how the trailblazers have moved from discussion and agreement of offers to their operation. It is the account of the providers and tenants who participated in this initiative and not a judgement or a recommendation of the regulator.

Their experience shows that time invested in engaging and empowering tenants to help providers understand what it is like to experience services is invaluable, and that this investment in planning and agreeing offers pays dividends.

Included in this report is the wording of each of the local offers and a summary of their goals and achievements. The report lets the trailblazers speak for themselves. Anyone with an interest in planning or improving an existing local offer should get in touch with the organisations involved in this initiative. Their experience can help with ideas, inspiration and pitfalls to avoid, but achieving a successful local offer depends on the commitment of providers to make themselves more responsive and accountable to their tenants.

Claer Lloyd Jones
Chief Executive

Executive summary

Introduction

Local offers were conceived as a key part of the model of co-regulation. This approach saw tenants holding providers to account, subject to a backbone of national standards and it will remain a central feature of future regulation arrangements. The recent government review of social housing regulation emphasises a local approach with providers and tenants agreeing local versions of national standards, designed to reflect local needs and priorities. Local offers remain a key way of designing, delivering and improving local services.

This report aims to show the art of the possible. Thirty-nine local offer trailblazers (LOTs) tried new approaches and along the way made discoveries and, to be fair, also experienced a number of challenges. This report aims to relay these experiences from both a tenant and provider perspective. The report supplements the 'Going Local' report and its accompanying toolkit, published in June 2010. 'Going local' reported on the planning stage of local offers, from the start of an idea, through consultation with tenants and partners to final agreement. In this report, the trailblazers' progress is analysed to see how local offers are beginning to work in practice. This report also illustrates outcomes and learning from the trailblazers through case studies from the tenants and providers involved, giving the trailblazers the opportunity to speak for themselves.

As local accountability grows in importance, we hope that many audiences can take something from this report. The local offers developed by the trailblazers are not meant to be a blueprint for others to follow, but the approaches may help tenants and providers design new offers and/or challenge their own existing local offers.

Key findings

The report tries to do two things. Each of the pilots is different, so firstly we show some of the unique local aspects and some of the personal experiences behind the offers. We use detailed case studies to reflect both the provider and tenant perspectives. Secondly, the report draws out four key themes to look at common experiences across all the trailblazers. These are the measurement of performance; partnership working and shared services; value for money; and tenant involvement. Through these four areas, the report shows what approaches the LOTs took and why, the outcomes achieved and any common lessons that may be useful to others. The report is not intended to be prescriptive in its nature; instead it aims to show the variety of local solutions which are possible.

- **Measuring performance:** trailblazers found agreeing accurate performance measures, baselines and recording methods challenging. Many spent far more time than planned to agree not only the content of their offer, but how it would be measured. There were particular challenges in offers covering more than one provider and where 'local' meant dividing up data to report on numerous geographical areas.
- **Partnership working and shared services:** the everyday mechanics of working in partnership meant that the local offer experience for these trailblazers was very different to those working alone. Partnerships can bring challenges but equally there are efficiencies and benefits to working with others. Some of the challenges experienced by trailblazers included gaining buy-in from all partners and cooperation

between the various tenants from various landlords. Undoubtedly, the positive outcomes experienced through LOTs partnership working outweigh the challenges experienced.

- **Value for money (VfM):** in many cases, trailblazers have not yet fully realised or quantified their VfM benefits. However, in general, trailblazers were clear about how they expected to achieve better VfM. Some had progressed far enough down the route of joint procurement and shared services to suggest that those expectations would be fulfilled. In this report, we discuss the VfM challenges faced, how trailblazers are doing more for less, how VfM has been achieved in partnership with others and how tenants can play an important part in driving the VfM agenda.
- **Tenant involvement:** the trailblazers' experiences show that tenants play a number of crucial roles, not only in shaping and agreeing offers in the first instance but in launching them, monitoring their progress and holding to account those responsible for delivery. In some cases, tenants got involved to a great degree and helped gather information through inspections/mystery shopping. Some also delivered training to fellow tenants and created a number of 'armchair' and more active auditors. A number of trailblazers also developed or strengthened tenant scrutiny arrangements to formalise monitoring and to identify and address issues when things go wrong.

The local offer trailblazer programme has given tenants and providers the opportunity to trial an idea and to apply it locally. This includes the opportunity to take risks, rise to challenges and develop new ways of working, with largely successful outcomes.

The report aims to give a voice to the providers and tenants who have blazed a trail and to share the benefit of their ideas and the difference they have made. We hope this will give tenants and providers the confidence to apply this to their own unique local circumstances.

Introduction and background

Trailblazers established their local offers in one or more of the TSA's national standard areas. Thirty nine trailblazers started the process and 38 completed it. All of the customer-facing standard areas were well represented. The broad categories of LOTs are shown in figure 1.

Figure 1: Breakdown of completed LOTs

National Standard	Requirements	LOT categories	Completed LOTs		
			Partnership	Single provider	Total
Tenant Involvement and Empowerment	- Customer service, choice and complaints	Tenant choice and customer service	2	5	7
	- Involvement and empowerment	Tenant empowerment	5	5	10
	- Understanding and responding to diverse needs of tenants				
Home	- Quality of accommodation	Quality of accommodation	2	2	4
	- Repairs and maintenance	Repairs and maintenance	3	3	6
Tenancy	- Allocations	Allocations	3	0	3
	- Rents*				
	- Tenure				
Neighbourhood and Community	- Neighbourhood management	Neighbourhood & estate management	2	2	4
	- Local area co-operation	ASB and security	4	0	4
	- Anti-social behaviour (ASB)				
Value for Money	- Value for money	Not applicable to the LOT process			
Governance and Financial Viability*	- Governance - Financial viability				
Total			21	17	38

* not applicable to councils.

These 38 LOTs provide all the findings and information contained within this report. Each trailblazer has agreed to share further information using the contact details given in appendix two.

Going local

In June 2010, we published 'Going local', a report setting out progress and the lessons trailblazers had learned up to the point of launching their local offers. Alongside this was a practical toolkit to assist in the setting of future local offers.

'Going local' reported on the planning stage of local offers, covering consultation with tenants, and partners through to the final agreement of offers. This report focuses on what happened next, whether the momentum could be sustained, how tenants could monitor progress with local offers after their involvement in designing them, how changes could be made if performance falls short and what difference they made to local services.

The LOT timetable

The trailblazers had to achieve a substantial amount in a short period. Key milestones are shown in figure 2.

Figure 2: Timetable of key LOT milestones

Date	Milestone
August 2009	Providers were invited to become Local Offer Trailblazers (at the time referred to as Local Standard Pilots). 181 applications were received from a cross-section of providers.
October 2009	Successful applicants were selected and received grants to support the development of their local offer.
November 2009	TSA held an event for providers to share information amongst those involved in the process.
December 2009	Providers set out their baselines, project plans and progress so far.
March and July 2010	Trailblazers reported on their progress and answered more detailed questions around their approach, such as, how tenants were being involved, how performance and value for money were expected to improve. They were also asked at this stage whether they had any advice that could be shared with other providers.
September - December 2010	All trailblazers and some tenants from the LOTs were interviewed by TSA staff to develop deep insights into the LOTs progress and outcomes. This report is based on cumulative information from these interviews and previous performance reports.

Local offers in practice

Trailblazer organisations drew up their local offers in partnership with their tenants. Although each local offer was based on one or more of the TSA's national standards, the scope and responsibility for setting service standards and ensuring these were met, was a local issue. The definition of 'local' was decided by providers in consultation with tenants, who established four broad approaches:

- **Place:** the local offer centred around a geographical area, which could be a local authority area, town, estate or neighbourhood involving a number of providers.

- **Demographic:** the local offer targeted the specific needs of groups of tenants, for example older people or residents of supported housing.
- **Organisational:** trailblazers set local offers for their own stock and tenants, regardless of location or demographic.
- **National:** one trailblazer, the Confederation of Co-operative Housing (CCH), produced an accreditation framework encompassing all the standards that could be applied to co-ops across the country.

Providers and tenants produced agreed pledges of what services could be expected and how these would be delivered. Most of the local offers included:

- The standard of performance expected
- How performance will be monitored, reported and scrutinised by tenants
- What happens if the offer is not delivered and what redress tenants can expect
- How and when the local offer will be reviewed

Examples of agreed local offers can be found at appendix one. However, the local offers produced by the trailblazers were much more than just words; they represented a framework in which tenants, providers and partners could work together. The local offers came out of a collaborative approach, which was often outside more formal tenant participation structures. Local issues were identified and tenants were engaged to design approaches alongside providers. Tenants were also encouraged and supported to challenge their provider's progress.

The remainder of this report discusses what has been achieved and how LOTs faced and overcame the challenges involved. Through the four areas of analysis, this report sets out to show what approaches the LOTs took, the outcomes and lessons learnt that may be useful to providers and tenants alike.

Measuring performance

Keeping track of progress is essential for a successful local offer. Effective performance measures help to formalise local offers, identify areas for improvement, help tenants to challenge performance and reveal the extent of the offer's impact.

Agreeing accurate performance measures, baselines and recording methods was a challenge. Many trailblazers spent far more time than anticipated to agree not only the content of their offer, but how it would be measured. There were particular challenges where more than one provider worked together, where 'local' meant reporting data, sometimes for the first time, on a street, block, estate or town basis. Data often reflected very different working practices and sometimes wide variations in performance. Trailblazers used a variety of approaches to tailor performance measures to their particular circumstances. This section looks at those approaches and picks out examples of trailblazers who put in place a successful performance measurement.

SMART targets

In order to establish their local offers, trailblazers stated the intended impact of the offer and subsequently, the measures used to judge success. To arrive at these measures, most trailblazers agreed SMART targets (Specific, Measurable, Achievable, Realistic and Time-bound). A small number also introduced effective tenant scrutiny arrangements, which further enhanced their ability to meet tenants' needs.

The majority of measures were either about doing things in less time or more efficiently. There were comparatively few explicit value for money targets, although many trailblazers have pointed out that improvements in services and tenant satisfaction are in themselves greater efficiencies.

Setting performance measures

Norfolk RSLs Alliance, led by Wherry HA, developed a local neighbourhood and estate management standard, in the form of a voluntary charter aimed at creating 'a clean, safe and green environment' in the multi-landlord village of Terrington St Clement. The charter applies to residents, tenants and owner-occupiers alike, and encourages all providers and local organisations to pledge to it.

The Alliance, through a series of local focus groups and events, set priorities for the local offer with residents from Terrington St. Clement. These priorities were used to inform which performance indicators were selected. As no statistics could be singled out for the village alone, a comprehensive survey of tenants' perceptions was used to help establish a baseline and then record progress on a quarterly basis. The survey not only covered tenants but all the village residents to help compare the relative satisfaction of tenants and owner-occupiers. Targets were then set by the Terrington neighbourhood standards panel, which consists of tenants from each of the four providers in the Alliance. Summarised by Norfolk RSL Alliance, the targets set can be summarised as follows:

- 10% increase in satisfaction with the neighbourhood as a place to live
- 4% increase in satisfaction with landlord
- 15% increase in satisfaction with views being taken into account
- 14% increase in satisfaction with street cleanliness

The panel also recommended actions that the providers should take in order to meet these targets, which gives a clear message from tenants where they would like provider effort to be focused. Progress against the set targets is measured quarterly by the panel through a neighbourhood action plan, which is updated before each multi-agency estate inspection. If the panel is unhappy with progress against any of the actions on the plan, they can escalate issues to the RSL Alliance operational board.

The '10% increase in satisfaction with the neighbourhood as a place to live' target has already been met. Additional benefits already achieved include, fewer empty properties, increased tenant satisfaction and less anti-social behaviour. Norfolk RSL Alliance also reports that the approach has fostered improved collaboration between frontline workers from different service providers and the "genuine involvement of residents increasing social capital". As for all the local offers, further details in appendix one and two give the wording of the offer, some further details and contacts for those involved in the trailblazer.

The following case study demonstrates one tenant's involvement in focus and review groups, which helped her to work alongside her provider.

Tenant case study 1: Town & Country (neighbourhood and estate management)

Dawn Stanford

Dawn Stanford lives in Sherwood, a neighbourhood in Tunbridge Wells and the focus of Town and Country's trailblazer. Dawn became involved right at the start of the LOT after hearing about it through the community trust. Town and Country also promoted involvement through local businesses, shops and schools.

Dawn recruited residents to take part in focus and review groups, using contacts developed through six years of volunteering in the area. She thinks her ability to link different groups together made her a great asset to the local offer.

Before the local offer, Dawn didn't fully understand how Town and Country were measuring performance. "We had input into what tenants actually want - measured and agreed achievable improvement goals. We wanted outcome-focused targets."

While she didn't receive any formal training, Dawn was assigned a contact at Town and Country who answered any questions. She says that residents now have a better idea of what they can reasonably expect from their landlord. "We can't just give them a wish-list; it's about what is achievable given constraints like budgets and legal responsibilities."

Tenants supported the breaking down of the cleaning contract down into local bite-size blocks. A social enterprise has been created to take over the smaller contracts. It employs local people up to the age of 24 who have been unemployed for more than six months. Dawn says the service is better because the people employed are from the area and take pride in the neighbourhood.

Dawn convinced the association to start a Facebook page, 'Team Sherwood', which is actively used. It links to resident groups and allows residents to log on for updates, learn about upcoming events and post photos. According to Dawn, the comments on it are now better informed.

Tenants thought the way Town and Country were reporting to them needed to change and Dawn says their input has helped. The written communication uses simpler language and tenants aren't overburdened with information. Dawn attends 'Eat and Speaks' meetings,

which are arranged in a local café or pub to inform residents about policy changes and get their feedback.

Dawn thinks the process is a positive one and says seeing the written local offer was rewarding because, as she puts it, "it's in our own words, and they are not necessarily the association's priorities – they're ours". Dawn says residents are proud to live in Sherwood and Town and Country has helped to try and change the image of the estate in Tunbridge Wells with a PR campaign.



Dawn is particularly proud of her idea for dog training (pictured). On a Tuesday night you will see a line of 15 or so dogs being walked through the Sherwood estate, with an instructor subsidised by Town and Country. Tenants only pay £15 for a five week course. She says more people are out with their dogs, Sherwood feels safer and there is less dog dirt.

"I live in one of the most labelled roads in the area, identified for poverty and ASB. The biggest thing I've noticed is people coming out their front doors. People are taking greater pride in the neighbourhood, making little improvements to their gardens and properties. It's a more united neighbourhood."

Overcoming challenges and 'thinking outside the box'

Halton Housing Trust had to overcome more challenges than most in setting its performance measures. Working with six partners (Arena Housing, Cosmopolitan HA, Liverpool Housing Trust, Plus Dane, Riverside and Halton Borough Council) and linking with the Halton Housing Partnership (a group including 15 further providers with homes in the area), the Trust developed an allocations and lettings local offer which aimed to produce a clear standard for choice based lettings (CBL) in Halton. The standard was determined by existing customers seeking to be re-housed and also the wider community.

Halton Housing Trust's challenges centred around three main areas:

- Its online and postal surveys generated very low returns from customers
- It needed to monitor the whole re-housing process, not just the outcomes which meant:
 - a) There were no set measures it could use
 - b) There was no baseline information to work from
- It needed to co-ordinate a number of partners and stakeholders, all with different working practices, methods of recording information and speeds of movement

Through trial and error, Halton found that a change in its consultation approach using more personal contact brought the level of responses it needed. Customer focus groups were set up to determine priorities, and these priorities were confirmed through wider engagement which included:

- Telephone interviews
- Websites and Facebook pages
- A stakeholder event involving statutory and voluntary sector agencies

- Through community groups, tenant and resident associations, customer and tenant panels and youth parliament
- Local media coverage

Halton's commitment to engaging 'hard-to-reach' groups saw them hold events in Pizza Hut to meet with young vulnerable families with children, as this was found to be the most effective means. Through such a commitment to do things differently, Halton achieved the wide engagement it needed.

As part of their LOT, Halton successfully invited tenants and housing applicants onto a customer steering group, which played a central role in setting performance measures. To get over the lack of readily available measures and baseline data, Halton decided to bring in HouseMark experts to facilitate two steering group sessions. They were a success and effective measures were set, which allowed baselines and performance recording mechanisms to be established. One of the key changes was to introduce and measure a 'right first time' approach to housing options advice including discussing options at the first point of contact and talking through options in both the public and private sectors.

The challenges of partnership working slowed progress. However, there were rewards in finding solutions to performance measurement issues. A joint customer satisfaction survey now establishes a consistent measure across all tenants and applicants, regardless of their provider. Tenants have been trained by TAROE (Tenants and Residents of England) to carry out mystery shopping, empty property inspections and further customer satisfaction surveys. Furthermore, a cross-landlord scrutiny panel is being trained to take on a performance monitoring and scrutinising role as this local offer progresses. Although it has taken time to overcome these difficulties, Halton now has a local offer and new, effective performance measures to monitor its impact.

"We are more aware of what customers' requirements and priorities are. Key to this has been communication and information. This project has reinforced the importance of these elements as well as providing us with some new ways of engaging with our customers."

In Halton and in the majority of LOTs, setting performance measures in partnership with tenants helped focus the offer, contributed ideas of how different elements of the LOT could be run and gave tenants active roles in developing the measures themselves. Tenants also contributed benefits that were not expected, in the case of **Thrive Homes and Watford Community Housing Trust:**

"...we are measuring things we have not previously measured, or asked residents to measure us on – namely the three standards surround[ing] the neighbourhood officer."

Thrive Homes and Watford Community Housing Trust's LOT centres on neighbourhood and estate management in the Boundary Way housing estate. The LOT aims to make the estate a better place to live and to improve perceptions. When consulting on the offer, tenants made it clear that the neighbourhood officers were not working visibly enough. This was something the providers were not aware of before consultation.

"By providing photos of our neighbourhood officers and wearing landlord branded clothing, residents know when we are out on the estates and are encouraged to stop

staff and speak to them. This builds on the relationship between the providers and the community.”

Three standards are now monitored by the tenant performance monitoring group and these can be found in full in appendix one.

Thrive Homes and Watford Community Housing Trust already believe they have anecdotal evidence that tenant satisfaction has improved on the estate and they are looking for confirmation in the results of their satisfaction survey. It is largely through simple, quick-win measures derived from tenant input that progress is being achieved. Thrive also realise that tenant perceptions of what is being done can be as important as what is actually being achieved. Effective tenant communication and engagement are crucial to making a local offer successful. Simple measures such as publishing a schedule for estate inspections, communal cleaning and grounds maintenance on estate notice boards mean tenants know what to expect and increase local accountability.

Engaging tenants

Performance measures cannot work without the understanding, co-operation and active engagement of tenants. Although LOTs vary significantly in size, there are some common challenges and solutions. For example, figure 3 compiles the range of performance information collection and monitoring methods used - most of LOTs used a combination of the methods listed. However LOTs individual circumstances rarely meant that an ‘off the shelf’ solution worked for any trailblazer and trailblazers put a lot of effort into developing their own variations on these collections and monitoring methods.

Figure 3: Performance measurement collection and monitoring methods

By providers	By tenants
Customer satisfaction survey (post/phone/face-to-face)	Tenant or customer inspectors/auditors
Inspections/ visits (e.g. empty properties/estate inspection)	Mystery shopping
Recording local information for performance indicators e.g. % complaints resolved within a week	Existing tenant groups reviewing progress and making suggestions, maybe adapted or trained for the purpose
Undertaking interviews, door knocking	New tenant groups e.g. Interest groups addressing individual areas, focus groups actively providing insight
Staff gathering opinions through day-to-day role	Volunteering opinions through optional mechanisms e.g. Message boards, photo boards, graffiti walls, comment boxes

Bemerton Villages Management Organisation (BVMO) is an Islington based tenant management organisation with 1,500 homes in an area of high deprivation. Tenants come from diverse backgrounds, speak different languages and the turnover of homes is unusually high. To make things more challenging, already high satisfaction rates led to low turnouts at LOT events, despite wide advertising and promotional efforts. Changing their approach, BVMO found that piggy-backing on established events and using a leaflet to generate interest worked effectively.

To monitor their repairs standard BVMO needed a quick, easy to understand format which tenants could immediately understand and complete accurately every time. BVMO came up

with a post-repair feedback form, which used simple smiley/sad face graphics to allow tenants to indicate their satisfaction with their repair. This simple mechanism got over language barriers and was quick and simple enough for all tenants to use. It also provides a constant stream of performance information to be considered by the newly set-up resident's services sub-committee.

Thrive Homes and Watford Community Housing Trust also use the smiley/sad face system, but to communicate performance levels to tenants in their reports rather than as a medium for collection. Similarly, Home Group use a gold, silver and bronze system of ranking performance to good effect.

Chapter 1, a provider of supported hostel accommodation for younger people found they needed to get creative in order to engage their tenants. Chapter 1 accommodates tenants from a wide variety of backgrounds and many only live in the accommodation for short periods. As their LOT aimed to improve customer service and the day-to-day contact between staff and tenants, Chapter 1 set out to develop performance mechanisms that would:

- Be accessible to residents and user friendly
- Provide quantitative and qualitative feedback
- Not be burdensome to residents or staff

Chapter 1's staff and tenants initially struggled to come up with measures of performance beyond the usual questionnaires and feedback forms, and they wanted to go beyond what these mediums could provide. As a result, a guide was produced to help people think of alternative ways to monitor performance and set targets. The guide, 'Proving it', lists ten ways to show how staff are/are not delivering good customer service. In addition, facilitation teams worked closely with staff and residents to help them think about what they wanted to achieve and the best ways of making it happen. Solutions included photo boards, graffiti walls and scrap books. Through these mechanisms Chapter 1 tenants have new ways to get involved, which do not demand a commitment to formal groups.

Chapter 1 has also recruited tenant inspectors from residents involved with the local offer trailblazer. Tenant inspectors are responsible for gathering evidence of progress and checking that targets have been met. However, in order to extend the good practice developed through the LOT more widely, Chapter 1 is planning to recruit tenant inspectors from beyond the LOT schemes with a view to them helping replicate the LOT approach in other schemes.

Through their trailblazer, Chapter 1 believes it has improved its understanding of tenants needs and the processes for meeting them. Staff also feel they have developed a successful means of identifying tenants' needs and ensuring these have been met, as well as improving the quality of communication with tenants. It is these benefits that Chapter 1 now wishes to spread throughout its organisation to the benefit of all tenants.

Effective tenant scrutiny

Tenant scrutiny mechanisms used by trailblazers varied widely. They included relatively informal arrangements to purposely set-up self-directing tenant scrutiny panels linking into the management structure of the provider. Informal arrangements could include general invitations to tenants to attend meetings where performance would be reported, or providers sharing performance information with tenants (for example through mechanisms

such as websites, leaflets, notice boards, part of existing publications, or purpose-written performance reports) and asking for their feedback. The feedback would be used in the LOT process but the agenda would be set by the provider and there would not necessarily be direct links between tenants and the provider's board.

The following case study demonstrates one scrutiny role undertaken as part of a provider's LOT.

Tenant case study 2: Halton Housing Trust (allocations)

Michael Hill

Michael has learnt a lot about allocations. Before taking part in Halton Housing Trust's LOT, he'd assumed that your name simply went on a list and points were put against it. Now he realises there can be more choice for tenants and that allocations can be clearer and fairer.

Michael was able to get involved with the trailblazer because he'd stopped paid work in order to care for his two children who are disabled. He's been working closely with Halton to design a purpose-built bungalow for the family. "Since giving up work I kind of miss having something to keep my mind occupied and I miss the adult conversation."

He joined a panel made up of a mix of tenants from all six associations that have homes in the borough. He says it has been great getting together to compare and contrast the service from different landlords.

The panel went to residents in the borough and asked them what their biggest concern was. He says many people were worried about allocations and they decided the local offer should be about creating a single allocations policy across all the housing associations in Halton. They worked with the other associations to find a common framework for the new policy. Michael says it's been positive for tenants from all different landlords and when they get together they can use the good ideas from each other. "It's empowering to collaborate and use the best bits of each association's policies to come up with one fantastic policy for the borough."

A single list of available properties will be published and there is one application process. Michael says this will be a more open and accountable system, and that everyone has an opportunity to express interest in available properties. He is sure this new system will cut down the costs as associations no longer require individual housing lists. Each provider now also gives consistent and tailored information to everyone at the point they ask about re-housing options. Michael says, "It's a real step forward that instead of just being given an application form, everyone, no matter which provider they contact, is now given full housing options advice to help choose a route to getting their own home."

Michael says more communication with residents has made it easier for them to understand how allocations work and the new scheme will give people better access. He feels this will make the process simpler. "It gives potential tenants more options because one application will go to all the associations."

"Halton Housing Trust has asked me to do further work in a scrutiny role. I'm happy to work with like-minded people and give something back to the trust, after all their help."

The Centre for Public Scrutiny (CfPS)¹ has established four core principles to achieving effective scrutiny:

- Provides 'critical friend' challenge to executive policy-makers and decision-makers
- Enables the voice and concerns of the public and its communities
- Is carried out by 'independent minded governors' who lead and own the scrutiny process
- Drives improvement in public services

Many LOTs are developing scrutiny mechanisms, although not all yet have a clear route to the organisation's decision makers.

Wolverhampton Homes (WH) has taken this approach on board. Their LOT was aimed at offering greater choice in service delivery. The LOT area covers 21,000 homes managed by Wolverhampton Homes or one of the four tenant management organisations (Bushbury Hill, Springfield Horseshoe, Dovecotes and New Park Village). Wolverhampton Homes hoped to improve services and tenants' satisfaction by more effectively deploying its limited resources. They saw effective tenant scrutiny "with teeth" as an excellent way to help them achieve this.

In January 2010, Wolverhampton Homes set up a review panel using the Board Development Agency's 'Resident Scrutiny Toolkit' as a guide². This new approach replaced Wolverhampton Homes' existing tenant involvement arrangements.

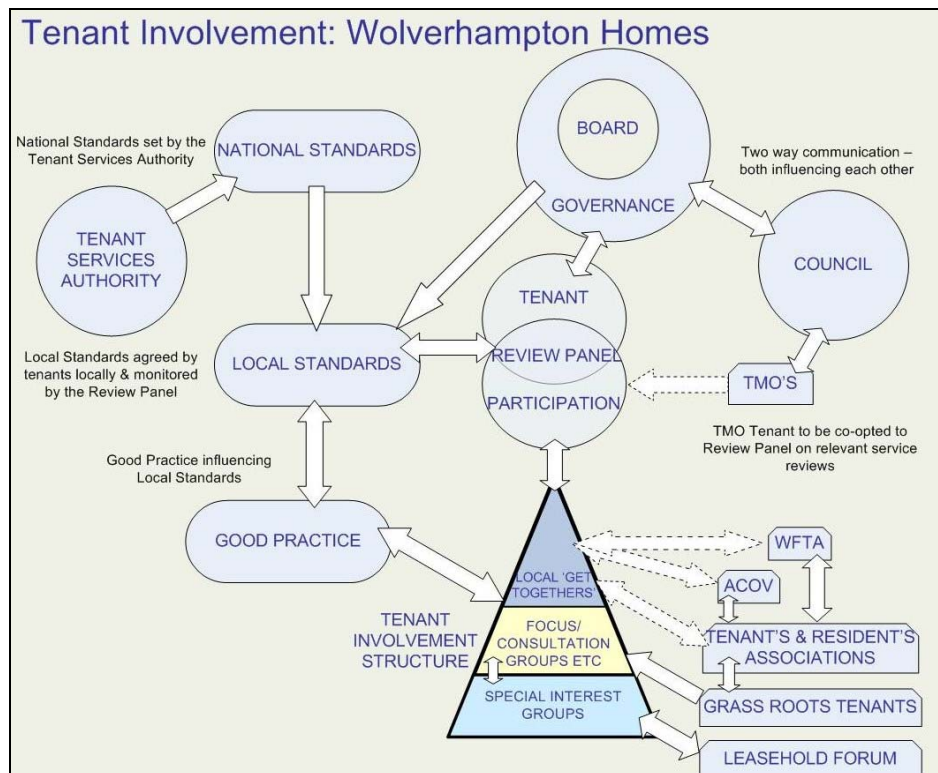
"We have changed the relationship with tenants quite fundamentally. In the past WH would take proposals to meetings for tenants to discuss, now services are designed around tenants' priorities. This has changed the balance of power."

The review panel was formed to ensure demographic representation from all groups of tenants who would take the lead responsibility for scrutinising Wolverhampton Homes' performance, not just limited to the local offer. Now established, it sets its own work programme of reviewing performance, evaluating the effectiveness of tenant involvement arrangements and reviewing underperforming services. Figure 4 shows Wolverhampton Homes' tenant involvement programme, which sets out the role the panel plays and into what areas it feeds.

¹ <http://www.cfps.org.uk/about-us/>

² The Toolkit is available for purchase from the Board Development Agency website: www.boardagency.org.uk

Figure 4: Wolverhampton Homes tenant involvement diagram



Panel members receive ongoing training and for the first year benefited from the support of an independent chair provided by a consultant. Finally, to ensure the Review Panel's voice is heard, it reports and makes recommendations directly to the Wolverhampton Homes board. More panel information can be found on the Wolverhampton Homes website: <http://www.wolverhamptonhomes.org.uk/yourcommunity/gettinginvolved/reviewpanel.aspx>. The following case study sets out one of the review panel members' experiences.

Tenant case study 3: Wolverhampton Homes (tenant choice and customer service)



Joy McLaren (pictured)
 As a qualified nurse and midwife, Joy McLaren knows the importance of budgeting to help make ends meet. And since joining Wolverhampton Homes' tenant review panel, she's been able to put her money-management skills to even greater use.

When it was setting up its LOT, Wolverhampton Homes decided that being open with tenants about the money it has would be beneficial for both tenants and the ALMO. Joy says it has changed how she looks at the services provided. Previously, she would receive updates on budgets through the landlord's newsletter but the tenant review panel has increased her awareness of the financial issues faced by the ALMO. "We get a lot of information at our meetings, particularly when services are being reviewed. We're there to make sure that Wolverhampton Homes give value for money. I used to think, 'we need new fencing, or we need this or that, so just get on and do it'. By being involved more closely, I can see better how the money that's available has to be prioritised. I don't assume any more that things aren't being done because

Wolverhampton Homes are being ineffective." "Put simply, you can't have what you can't afford."

Joy felt that too much money was being spent on consultants and is pleased that more resources are now channelled directly towards services. Joy, from the Parkfields area of Wolverhampton is now also considering the impact of possible spending cuts. "As a review panel, we're looking at the Decent Homes programme. Mine was one of the last council houses ever to be built and I'm lucky, I've had it upgraded recently. I want to help make sure others do too."

All this is quite a leap for someone who's tended to shy away from getting involved. "I didn't feel I was the right sort of person to be on a panel and I couldn't commit to the level of involvement needed to be a tenant board member. Being on the tenant review panel works for me."

She joined the panel at the beginning of 2010 and she's also become part of Wolverhampton Homes' special interest groups. Because of her background, she got involved in issues relating to health at first. "Having worked in health, my opinions were challenging."

Since then, she's also looked at tenant involvement itself, inspections and under-occupancy. But it's in the area of diversity that Joy is particularly keen to have an impact. "Being on the tenant review panel means I can work with a wider and more diverse range of tenants than if I were on the board. Involving more people from black and minority ethnic backgrounds can only be a good thing. Together we can come up with new ideas that are more tenant-centred. There's no sense of 'them and us' with Wolverhampton Homes. I've come to realise that the tenant review panel is about being a critical friend."

Wolverhampton Homes believed that a single panel of tenants would not be enough to deliver the culture change it needed. In response, special interest groups (SIGs) were launched. SIGs support the review panel and give tenants further opportunities to take an active role; especially for those who cannot commit to the ongoing review panel. SIG tenants, guided by the review panel, carry out detailed policy or process reviews in areas of importance to them. Currently, SIGs have been set up in six areas (others will be created if and when the review panel decides):

- Repairs and maintenance
- Decent Homes
- Grounds maintenance
- Anti-social behaviour
- Communications
- Services for disabled people

Wolverhampton Homes introduced these arrangements alongside their established practices of keeping tenants informed through annual reports, newsletters and local get togethers. Through the new scrutiny arrangements and existing engagement practices, tenants now have access to wider opportunities to get involved at whatever level they choose. They are already seeing satisfaction improvements in services where they have made changes, such as day to day repairs. As a result, Wolverhampton Homes now has a tenant scrutiny framework that can better direct resources and challenge existing ways of doing things to further improve tenant satisfaction.

Some trailblazers took the approach of extending their existing co-regulatory arrangements to meet the demands of the LOT. **Spire Homes** did this. Added tenant involvement proves useful beyond the confines of the trailblazer local offer. Developing a local offer in quality of accommodation meant that Spire needed to come up with an effective way of inspecting properties. As well as a steering group involving all partners, Spire set up a new resident inspector team which has become a permanent part of Spire's framework, with a direct link to the Board.

The Inspectors were trained by an external consultant to undertake rigorous property assessments. They were supported by a good budget and a mentor from the in-house tenant involvement team. The resident inspectors became crucial to Spire's approach and play an important part in its wider scrutiny arrangements. They enjoy a high-profile which has encouraged interest from other tenants in getting involved.

Initially, resident inspectors met to agree what performance reporting they wanted, they then undertook a full review of Spire's housing, resulting in 24 recommendations and a full improvement plan. They have been involved in monitoring and checking Spire's re-let offer, for example, random void inspections, home visits and telephone interviews to get tenants feedback. As they are such a valuable resource, Spire intends to continue to utilise resident inspectors in these and other areas.

Partnership working and shared services

In this section, we look at the experiences of local offers which have been delivered by multiple providers, as well as other stakeholders in partnership. The everyday mechanics of partnership working means the local offer experience for these trailblazers is very different to others working alone. Partnerships can bring their own challenges but equally there are efficiencies and benefits that can only be achieved through effective partnership working. This section looks at some of the advantages and difficulties, as well as some of the positive outcomes realised.

Involvement in partnerships

Just over half the LOTs were set up to be delivered by partnerships. These were different sized groupings of housing associations, ALMOs, TMOs, local authorities (LAs) and tenants. Thrive Homes and Watford Community Homes Trust started their LOT with a partnership of two. By contrast, Bristol Housing Partnership originally set out to establish a partnership of 42 providers – 13 of which were housing associations which cover 90% of the housing in Bristol. In all cases at least the core members of the trailblazer partnership had some previous experience of working together, thus the LOT represented an opportunity to get more value from those existing ties.

Organisations other than housing providers also got involved in some of the LOTs. Where the local offer overlapped with another agency's interests there were obvious points of contact. For example, **Midland Heart's** local offer in neighbourhood and estate management covered areas such as graffiti, fly-tipping, crime and maintenance of communal areas. Midland Heart worked with the local police, fire service and contractors at their consultation events. **East Midlands HA** and **Foundation Housing HA** who developed a local offer on anti-social behaviour, also worked with wider partners including the Police through Leicester's strategic housing partnership. Although the local offer was confined to the two providers, they recognised that more effective action to tackle ASB would need to involve wider partners and that through this involvement, a city or estate-wide local offer could be explored in the future.

Other trailblazers thought 'out-of-the-box' about how partnership working could benefit their offer. Building on an existing relationship with Burnley College, **Calico** saw an opportunity to answer their need to cost-effectively gather the views of tenants through a survey. Calico entered into an agreement with the college so that its students would conduct a survey on customer expectations for their repairs offer. In return, the college gained an excellent learning enrichment project, and the students gained new skills and work experience. Calico gained a 15% response rate to the survey and a replicable format which could be utilised in the future. The results of the tenant survey informed the development of Calico's offer, more detail of which can be seen in the following case study.

Provider case study 1: Calico (repairs and maintenance)

Calico has worked with its tenants to further improve the repairs service. Together they have identified and agreed four local offers for their repairs service (full details of which can be found in appendix one).

One of the key components of the local offers is a new indicator of 'jobs done as promised' rather than 'right first time'. Calico and their tenants acknowledged that 'right first time' is not always an appropriate measure for repairs. The majority of repairs can be carried out in

one visit but there are some that require more. Jobs defined as requiring more than one visit are generally those where further investigation is needed, or measurements have to be taken. For example, to repair a kitchen drawer front may take two visits if a drawer replacement is necessary.

To support this approach of 'jobs done as promised' and ensure that tenants and staff are clear on how many visits specific repairs will need, a matrix has been drawn up. This matrix lists specific jobs and the number of visits expected to fulfil them. By having this information available, expectations of tenants and staff can be managed.

Another of Calico's local offers ensures the quality of repairs. The offer gives a commitment to provide a repairs promise. Tenants are assured that the work done will last a given time period without further breakdown (subject to activity other than normal wear and tear). The normal guarantee period offered is six months. This reinforces professionalism and quality of service provided by Calico.

"The funding and drive from the TSA for this project gave us the impetus to tackle the thorny issue of 'jobs done as promised'. Nearly 700 customers gave us their views and wanted us to be clear about when a repair would be done and what it would involve. They wanted clarity and certainty about what would be done and when it would be completed by and relatively little interest in performance times or how we compared to others. Our approach has been to try and develop an offer that meets this common sense request and to make our service simple and customer-focused, while at the same time, using it as a way to be more transparent about our offer (annual repair statement) and to raise the standard of the work done (via the job promise commitment)" Andy Williams, Director of Customer Service, Calico Housing Ltd.

The workings of LOT partnerships

In general, those trailblazers working in partnership developed their local offers at a slower pace than those working alone. This was often due to the additional time it took to get partners on board, to agree standards they could all sign up to but which did not pander to the lowest performing partners, make decisions and 'drive' the local offer delivery forward in practice. Different approaches for progression were developed in different circumstances including some innovative approaches. One example is the Hampshire Forum which has been captured in the following case study.

Provider case study 2: Sentinel (tenant empowerment)

The project came about as a result of the successful formation of the Hampshire Forum (a partnership between resident representatives from most of the registered housing providers with bases in Hampshire), following a multi-landlord approach to the TSA's national conversation consultation. Leading resident representatives attended local conversation events and decided to continue with the formation of a countywide residents group and an application for TSA funding to help develop local offers.

The local offer agreement is between all the key housing providers in Hampshire (Sentinel HA, Radian HG, Winchester CC, Sovereign Kingfisher, Hermitage HA*, Fareham BC*, First Wessex HG, A2 Dominion, HydeMartlet, Testway Housing, Southampton CC and Portsmouth CC*), working in partnership with all their respective resident forums (* withdrawn from process). Excluding the local authorities, the forum represents some 68,000 resident households across Hampshire.

The trailblazer aimed to develop county-wide community involvement standards. It also aims to ensure providers' business planning processes reflect tenants' views and aspirations. The trailblazer took the national tenant involvement and empowerment standards and developed it to work for providers in Hampshire. Priorities were established by a survey of those involved in the forum and these priorities were tested through a further survey of 1000 Hampshire residents across all providers.

Participants in the trailblazer have been encouraged by the positive profile that the forum has created, as an example of what can be achieved through a positive partnership between tenants and providers. The Hampshire Forum was a shortlisted finalist in this year's Housing Heroes Awards and the forum continues to attract interest from other partnerships around the country.

"The creation of the forum has been a real success, it has galvanised opinions and the impetus to keep things going, as well as putting residents in the driving seat." Val Bagnall, Executive Director Sentinel Housing Association.

The Hampshire Forum, and the work undertaken to establish it, has led to a much improved network between providers. This has resulted in the wider sharing of practice across all service areas and at all levels of the organisations.

Shared practice	Led by which organisation(s)
Residents magazines	Portsmouth CC and Winchester CC
Websites	Testway HA
Training programming and evaluation	First Wessex HG
Impact assessments	HydeMartlet and Southampton CC
Walkabouts	Testway Housing
Informal measures	Sentinel HA, Southampton CC and Portsmouth CC
Neighbourhood improvement plans	HydeMartlet
Environmental sustainability	Sentinel HA and HydeMartlet
Involving youths	Portsmouth CC, Southampton CC, Sentinel HA and Testway Housing

In addition, other partnerships have developed closer working ties initially started through the Forum. For example, Sentinel, Testway and Sovereign Kingfisher have got together to develop a tenant inspection team that will be used to review each other's service offers in North Hampshire. Tenants across the county have also developed new networks to share and contrast experiences. Resident site visits between providers have been arranged through such networks.

The benefits of multi landlords LOTs

Bristol Housing Partnership realised a number of benefits through the multi-landlord approach to its local offer. Across the providers involved (who account for 90% of the stock across Bristol), the LOT focused on establishing a common standard for providing adaptations to disabled tenants and the partnership reports successes across two main areas:

- 1. Agreed changes in the way adaptations are funded in order to decrease the level of bureaucracy required to take action.** The providers involved have upped from £1,000 to £2,500 the value of the work they will do themselves without

resort to Bristol City Council. For adaptations over this amount up to £10,000 the cost will be split equally with the local authority.

- 2. Improved communication.** Communication between Occupational Therapists assessing adaptation needs, the housing team of the local authority and housing associations has improved. This means that requests for assessments for adaptations are received by the relevant provider as soon as they are made, allowing for quicker action. Similarly there is a new focus on keeping tenants informed with 'Adaptations Advocates' appointed to ensure tenants each have a single point of contact within their provider (further details in the case study below).

Some additional housing associations, although not fully signed up to the local offer, participate in the Operations Management Team which meets monthly. This group is a forum for all the partners and is putting into operation the recommendations of the local offer. The following case study gives further details on Bristol Housing Partnership's LOT.

Provider case study 3: Bristol Housing Partnership (tenant empowerment)

This trailblazer created a common standard for adaptations across Bristol. In total, 13 housing associations have signed up to a framework which outlines a common approach to communication with tenants. It also includes a common structure for the use of housing association resources for both major and minor adaptation works and a common approach to assessing quality.

There is a shared template for communication with tenants, in terms of website information, leaflets and tenant handbooks. Providers have also appointed 'adaptations advocates' who ensure residents have a point of contact in each association. These individuals deal with tenants' enquiries and provide practical help and advice as necessary. Some landlords have extended this advocacy role to include the collation and submission of paperwork to the local authority within a landlord grant application rather than the tenant having to do it.

Co-ordinating home adaptations is a complicated process as many different agencies are involved including the housing association, occupational therapists, grants officers and builders. The new standard should improve communication between everyone concerned and mean that tenants are always kept informed about what is happening with their application.

The partners also aim to share intelligence to get better prices for building work. The early emphasis of this work was on the practical issues of bringing a large range of providers together. Partnership working has been critical to the success of this LOT. Buy-in from each of the partners has been essential in particular when agreeing the funding structure.

"Agreeing the standard is simply the start. The real work comes later in raising awareness, setting the standards as high as possible and developing those important relationships that will make service improvement sustainable over time. Our approach in Bristol has been cautious but clear. Something that can be readily developed in-house takes on a completely new dimension when you are involving a large number of organisations with different starting points and approaches to adaptations. You need to factor this in to your project planning. Even though its still 'early days' we have seen some marked improvements to the service. Better information, greater awareness and confidence in dealing with adaptations is improving responsiveness and resident satisfaction." David Greenhalgh, Assistant Director (Maintenance), Knightstone Housing Association (one of the partners).

A partnership approach also allowed trailblazers to tackle issues affecting particular localities, which would not have been otherwise possible. **Bolton at Homes'** local offer, for example, found one benefit of partnership working to be the intelligence that each partner brought with them. They were better able to identify ASB hotspots throughout Bolton, allowing the partnership as a whole, as well as the individual partners, to better focus their services.

Thrive Homes and **Watford Community Housing Trust** focused their neighbourhood and estate management offer on tackling established issues on Boundary Way, a 1950s estate with a poor local reputation. The LOT aimed to put right:

- Differing service standards on the estate
- Limited co-ordinated approach between providers, for example with estate inspections
- Differing tenant satisfaction levels
- A general sense of apathy, brought about by a feeling from tenants that their views were not being taken into account
- A poor estate image
- Environmental nuisance, including graffiti, dog fouling and fly tipping

The LOT used the existing Boundary Way community action group, involving residents and providers to co-ordinate its response. The action group has since enlarged to include Three Rivers District Council. Tenants had previously made it clear that the separate approach taken by the providers on the estate was not working, "...for too long, people have created a divide, treating us as separate parts of one estate."

Through the action group, the partnership has developed and started to realise benefits for tenants. For example, in terms of the problems they were having with dog fouling. This was consistently raised as an issue of concern by tenants and was subsequently tackled by the two partners and Three Rivers DC working together. The placing of the bins was decided via a tenant consultation at the LOT event and a joint estate walkabout by the three organisations. The bins were then jointly funded and placed. A similar approach is now underway to improve signage on the estate.

Sharing services

Shared services were not widespread amongst the LOTs, in the sense of them being funded and controlled jointly by partner organisations. More common were examples where services from different partners were co-ordinated towards common goals. **Thrive Homes**, for example has offered its partner **Watford Community Housing Trust** its service to help meet the standard set for removal of graffiti as part of their neighbourhood and estate management LOT. However, the providers retain separate services for this task and thus direct control over each.

However, a form of service-sharing did occur within the London Borough of Hillingdon's LOT. The **London Borough of Hillingdon**, along with five housing associations (A2 Dominion, Catalyst, Notting Hill Housing, Paradigm and Look Ahead Housing and Care) aimed to develop a tenant empowerment standard that would be adopted by every provider in Hillingdon. Their approach to partnership working saw each partner given the responsibility for one element of the LOT, for example training for mystery shopping (A2 Dominion), and ensuring the performance framework works properly (Notting Hill). Using this model the whole partnership benefits from the results of each partner's work, so that elements such as

training services, including those for tenants with learning difficulties, mystery shopping and scrutiny that have been developed can be shared. More detail on this particular trailblazer can be seen in the following case study.

Provider case study 4: Hillingdon Council (tenant empowerment)

This trailblazer has been led by Hillingdon Council, which, in its strategic role, has developed a local housing partnership with all registered providers in the borough. In July 2009, the partnership decided to develop a local authority-wide tenant empowerment standard.

Hillingdon Housing Service³ and five other members of the Hillingdon Partnership (A2 Dominion, Catalyst, Notting Hill Housing, Paradigm and Look Ahead Housing and Care) accepted the open invitation to work with the local authority to develop the local offer. Together these providers own approximately 18,000 dwellings in the borough, around 90 per cent of Hillingdon's social housing.

The purpose of the local offer is to develop an overarching multi-landlord resident engagement framework to complement the Local Housing Partnership. The partnership also wanted to support tenants and leaseholders from different landlords and with differing needs to work together to identify and respond to local priorities. In addition, Hillingdon, through its offer, wanted to fully engage tenants and leaseholders in the planning, decision-making and scrutiny of the standards.

The trailblazer built on Hillingdon Council's 'Putting Customers First' initiative, launched in June 2009. The initiative involved 10 good practice standards which focused on essential processes that any organisation could follow to put customers first. The 10 standards were developed with stakeholders over the previous year and received overwhelming support. The TSA invitation to join the local offer trailblazer programme provided an opportunity to build on this initiative and develop measurable outcome-based empowerment standards for social housing tenants living in the borough.

Council tenants were consulted during the TSA's local conversation and asked to vote on the initial proposal to join forces with housing association tenants and create overarching borough-wide empowerment standards. They were advised that this was intended to compliment rather than replace their new structure. More than ninety per cent of tenants who attended the consultation events agreed with the proposal. The local housing partnership, which consists of around twenty providers, considered the possibility of finding common ground to develop overarching standards. The challenge was to ensure the final product would meet local needs without the need to change organisational-wide standards and structures for the respective partners.

The standards themselves specifically relate to the offer to become involved with the overarching Hillingdon empowerment framework (and are recorded in full in appendix one). They focus on the opportunities for tenants and leaseholders to inform and scrutinise the ongoing activities of the local housing partnership. This specific relationship emerged as a priority during the ongoing consultation with tenants.

³ Formerly Hillingdon Homes ALMO - control of housing management returned to the council on 1 October 2010.

"It's fair to say that delivering this trailblazer has, at times, been very demanding for everyone involved. The level of commitment and enthusiasm that tenants and partners have contributed has been remarkable. We've developed strong working relationships and are continuing to go from strength to strength." Janice Nuth, Service Development Manager, Hillingdon Council.

The partnership is now considering sharing further services in terms of employment and training outside of the LOT. More information for this partnership can be found at: <http://www.hillingdon.gov.uk/tenants>

Value for money

This section reviews the areas in which trailblazers achieved, or are expecting to achieve, better value for money (VfM) through their local offer. Many trailblazers have not yet fully realised or quantified their value for money benefits. However in general, trailblazers were clear about where they expected to achieve better VfM and some had progressed far enough to suggest that those expectations would be fulfilled.

The challenges

Trailblazers and tenants are united in recognising the need to get maximum VfM. Providers wish to deliver the best possible services they can, and tenants wish to see their money being spent as effectively as is realistically possible.

The current policy agenda also makes this an area of special focus. The recent comprehensive spending review set out how power is being shifted away from central government to the local level and along with this goes responsibility for getting the best possible VfM. The government's Big Society agenda and the Localism Bill reinforce the trend of shifting power from the state to the local level and encouraging social responsibility.

For providers, this may mean making more transparent spending decisions and having greater freedom to tailor their services. The importance of getting spending decisions right puts pressure on providers to ensure that their local offers are insight-led. Feedback from the trailblazers suggests providers want to be sure they know exactly what tenants want, and tenants need to know what is possible and how to get their voices heard. Ensuring this is the case, posed some of the greatest challenges faced by the trailblazers.

Doing more for less

For a large number of trailblazers, VfM benefits were considered to be achieved if service performance improved in their target areas and tenant satisfaction increased. Where they focused their effort was largely informed by consultation with tenants, which is analysed in further detail in the following section. Some of the trailblazers looked to realise efficiency benefits brought by the economies of scale of working in partnership, through procurement or by co-ordinating services, effort, information and good practice. Others looked to redesign their services with the help of tenants to make them more efficient and effective.

Your Homes Newcastle (YHN) developed its offer around enhancing practical services to support its sheltered housing tenants. This ranges from the application stage to voting on activities and environmental improvements as established tenants. YHN's service enhancements have gained multiple VfM benefits, which they are beginning to quantify.

The simplified application process is less overwhelming. YHN now offers help to fill in forms, support to help applicants bid on properties or even bid for properties on their behalf, subsidised travel costs for applicants' viewings and a free financial assessment to help applicants understand whether they can afford to make the move into sheltered housing. YHN has also implemented an enhanced property standard for homes available to let, practical help moving in and a regularly reviewed support plan.

As a result, YHN has significantly reduced the number of refusals on properties offered from 52 in 2009/10 to just three from April to October 2010. This has made savings in staff time re-advertising (estimated at £594 a time) and in completing accompanied viewings. In turn

this has also helped reduce the number of empty properties from 55 to 25, bringing an extra £13,300 in rental income from April to October 2010. There has also been an average decrease of two hours a month spent by 27 officers on the task of dealing with rent arrears and/ or following up benefit claims.

Tenant satisfaction with the services received through the local offer is high. The proportion of tenants who found it easy to move into sheltered housing has increased to 97% from 85.2%. YHN has also received positive feedback from tenants about their experiences, with the enhanced property standard having a particular impact.

YHN continues to measure the value for money impact of its local offer and look for other efficiencies. Although their offer has already brought quantified VfM benefits, the full range and extent of the efficiencies realised will take more time to become clear.

The following case study sets out **Wolverhampton Homes'** offer and how they prioritised the customer experience throughout, it also demonstrates how they strived to maintain VfM principles in order to achieve their local offer outcomes.

Provider case study 5: Wolverhampton Homes (tenant choice and customer service)

Customer experience is fundamental to overall satisfaction, and first impressions count. All the information collected by Wolverhampton Homes suggested the need to improve access to services and offer more choice in service delivery arrangements. At the same time, Wolverhampton Homes introduced new ways to involve and empower tenants and leaseholders so that service delivery arrangements are more closely aligned to their local priorities.

Wolverhampton Homes and four Tenant Management Organisations (Bushbury Hill, Springfield Horseshoe, Dovecotes and New Park Village) manage all council housing in Wolverhampton. For all of the organisations, the project aimed to enable tenants and leaseholders to see and reconcile their priorities with available funding and make informed choices about future services. For the providers, sharing best practice and ideas, as well as challenging one another was the intention of working together.

Excellent customer service and VfM have been key drivers for Wolverhampton Homes throughout. Margaret Wright, Director of Performance and Customer Service, said "Tenants expect the best possible services from us, at the least possible cost. For this reason, many of our local offers are about doing more with less". The organisation has been through a cultural change tied in with their local offer, making the customer central to everything they do. A key part of this change is their aim to resolve eight out of ten calls the first time a customer contacts them, rather than passing the query onto someone else. Already, with additional training provided to front-line staff, there has been an increase in the proportion of calls dealt with at the first point of contact. This means that not only are customers getting the information they want quicker, but efficiency savings can be made with fewer staff engaged in handling repeat calls.

In many cases, tenants chose to enhance existing services by setting new targets or altering the way services were delivered. For example, customers told Wolverhampton Homes at the local offer get-togethers that they wanted two hour (rather than morning or afternoon) appointment times for their repairs service. Following its implementation in April 2010,

satisfaction has already increased and it is anticipated that this will also result in a drop in the number of abortive repairs calls.

Customers of all four organisations have been put in the driving seat in making decisions about what the programme of improvements should include. Tenants are given the opportunity to suggest improvements for their local area, armed with information on the available budget. Suggestions put forward included new fencing, energy efficiency improvements to homes, increased security for homes and the neighbourhood, as well as new front doors. Tenants then voted to prioritise the schemes to be taken forward.

Some of the organisations have been able to introduce additional services to tenants without additional for the payment of a small fee. These include services such as gardening, and a handyman and gas cooker connection services for new tenants.

Wolverhampton Homes is already seeing improvements in satisfaction levels in the areas they have made service changes. Although performance satisfaction will be formally measured by all four providers as part of their annual process, they are confident that their objectives for the project have been delivered.

Achieving value for money in partnership

One trailblazer striving to make efficiency gains, but across a partnership, is **Great Places**. Great Places with its partners in Oldham aimed at improving the choice based lettings (CBL) application process. They look for their local offer to deliver efficiencies through improving the accessibility and consistency of information put out by Oldham's CBL partners, and also incorporating a 'no wrong door' policy so that applicants have more ways to access the scheme.

"At present hundreds of bids are submitted every week, many of which are ineligible, which takes a large amount of staff time in putting bids onto the system and prioritising applicants. Better provision of information will lead to a reduction in the number of bids received which will free up more time to provide advice and support to applicants".

The Oldham CBL partners now share common marketing materials in the form of posters and leaflets that give out consistent advice to potential applicants. This saves resources in the design and production of materials, and staff time in dealing with confused applicants and poor applications. They have also agreed a common applications process and application form to ensure applicants get the same treatment from whichever provider they approach. The partnership is now looking to improve its provision of information further by developing a simple online calculator, through which applicants can input their details and see waiting lists, the number of lets over time in their chosen area and estimated waiting times for properties that meet their needs. This is a practice that the partnership identified in Cardiff, which they are looking to replicate in Oldham that could further help reduce the number and increase the quality of the applications they receive.

Although the VfM benefits are as yet unquantifiable, the partnership is closer to realising efficiencies that will free up staff time and improve service delivery to customers.

Also in a partnership setting, **Bristol Housing Partnership** sought to realise greater efficiencies through establishing consistent procedures for aids and adaptations. As well as restructuring how adaptations are funded, to try to speed up the process and make funds

go further, they have also implemented a call-off contract for the use of private occupational therapy (OT) services, therefore saving money when the OT is not required.

Bristol Housing Partnership will also benefit from cheaper procurement of contractors to carry out the adaptations work. Bristol City Council negotiated a framework agreement with four contractors to carry out higher value adaptations work. The majority of providers involved in the partnership have found that the prices within this agreement are lower than they could obtain independently. Some partners have also expressed an interest in using the contractors within the framework agreement for works costing less than £2,500. There are very immediate monetary savings to be made for the partnership through cheaper procurement, which they intend to take advantage of.

The procurement benefits will be extended further as the local authority is also in the process of establishing a similar framework agreement for work involving stair lifts. Thus all partners within the Bristol Housing Partnership can benefit from the greater purchasing power of a larger member, the City Council.

The following case study from **Norfolk RSLs Alliance** shows their commitment to producing a local offer with VfM in mind from its very inception.

Provider case study 6: Norfolk RSLs (neighbourhood and estate management)

Terrington St. Clement is a very rural village in West Norfolk with a population of 4,000. There are 334 social homes managed by four registered providers (Wherry, Freebridge, Peddars Way and Cotman). Providers have attempted individually to tackle estate management issues and anti-social behaviour and recognise that a partnership approach could provide a more efficient and effective response, as well as deliver better outcomes for residents.

The four providers identified a common standard of estate management agreed by tenants, including clear responsibilities and local accountability, to deliver a consistent level of service.

The local offer takes the form of a charter. It is a voluntary agreement between the whole community, not just social housing tenants, and includes organisations that provide services to residents and businesses. All organisations making a pledge to the charter are committed to creating a clean, safe and green environment in Terrington St Clement so that both residents and visitors can enjoy a good quality of life. The charter sets out rights, responsibilities and expectations between residents, social housing providers and service providers.

It was important to the Alliance that they built a model that could be replicated in other locations, so investment focused on ensuring this. Costs have been carefully monitored and a cost matrix developed. This will identify efficiencies that are a consequence of partnership working. These efficiencies will be achieved by frontline staff of the four partners working more collaboratively in the neighbourhood. Issues such as allocating estate management tasks between them; estate inspections being led by one landlord with residents involved regardless of who their landlord is and partners working on the joint procurement of the grounds maintenance contract for the village will realise savings.

The value for money benefits aren't expected to be confined to neighbourhood and estate management. There are likely to be wider benefits such as lower void costs, less anti-social behaviour and reduced officer time, which the cost matrix will help to quantify. The partners recognise that full efficiency gains will take some time to feed through.

Terrington St Clement has seen a significant growth in social capital. Those residents who participated in the local offer feel listened to and know who to hold to account for services in their community. Small but significant environmental improvements were asked for by residents and have been rolled out. These have been low in terms of cost but were really valuable to tenants, such as making paths wide enough for pushchairs.

Mark Jones, Managing Director at Wherry, said: "The local pilot has made a tangible improvement to local residents' quality of life. You can physically see the improvement both on the estate and in the surrounding local area when you walk around Terrington St. Clement. The difference really is quite noticeable. We recently hosted a visit by the local MP, Henry Bellingham, who is well aware of the previous problems on the estate and during our walk around, he frequently commented how struck he was by what he saw. The whole project has been a great success and has engaged an isolated, rural community to become more self-reliant and together."

Tenant driven value for money

Town and Country took a different approach to improving VfM by looking to their tenants. They developed a new resident driven approach to neighbourhood management and renewal that aims to deliver quality local services without demanding mainstream provider resources.

Town and Country wanted to develop a social enterprise approach which meant tenants doing more for themselves and consequently saving money and providing better services. The aim was to have local services delivered by local people in line with the 'Sherwood Vision' (the overarching renewal programme for the area). For more detail on this offer see appendices one and two.

Although the development of Town and Country's approach is ongoing, some VfM benefits are already realised. Encouraging tenants to instigate ideas for mini projects is a definite positive of this local offer. For example, residents have organised dog training with a small subsidy from Town and Country, which has led to a reduction in dog fouling. Town and Country has also linked with the local YMCA to take 14-17 year olds who have been excluded from school on to do plumbing and grounds maintenance work, providing another very cost-effective solution with a corporate social responsibility element. These approaches are designed not only to deliver the direct cost saving benefits from the work undertaken but to increase the buy-in of local people.

Town and Country is not just investing in better value services, it also aims to spend less. Effective consultation showed tenants did not want to spend as much money on lawn mowing and wanted alternative uses for the land. In contracting future services, such as the communal cleaning service, Town and Country hope that their social enterprise approach will allow them to reduce costs and they will look to build in enough flexibility so that the services can be delivered according to changing needs.

The following case study shows how tenants were put in the driving seat at **Hanover Supported Housing** to make decisions over their maintenance contracts and helped achieve value for money for the provider.

Tenant case study 4: Hanover (repairs and maintenance)



Robert Jaffray

"We're all comfortable sharing our views and talking about what we want for the estate. That's how it began." The trailblazer is driving service developments as residents help to determine what services are required and how they should be delivered.

Residents attend weekly coffee mornings to talk about the estate and keep in touch. "A communal room makes things easier, we're lucky to have it."

Hanover's retirement housing manager, Ken Barnard, came to one of Robert's meetings in Yateley to talk about the introduction of a local repairs service. They also discussed how Hanover should rate tenants' satisfaction with repairs. Robert says that tenants helped to create a scoring system which includes criteria such as quality of the work, attitude, cleanliness and getting it right first time. Their scoring guide was later recorded within the estate's local agreement.

Tenants are asked to rate repairs to their homes using these criteria. Hanover will sometimes telephone residents at random to check their repair has been completed to their satisfaction.

Residents on Robert's estate found the quality of work of a previous contractor unsatisfactory and Robert says they were keen to form a new agreement with a local tradesperson rather than with a national company. The new repairs approach means that residents are able, subject to the contractor meeting Hanover's national contracting rules, to choose the repairs contractor they want on their estate. The local agreement approach has also encouraged residents to influence the cleaning tender for their estate.

"We had a problem with the charges for window cleaning and asked Hanover to go back to the company and re-negotiate the price. The company dropped the price and the contract was signed. This directly affects our service charge, so we want to have a say." Robert feels he has a better understanding of what Hanover can offer. "We've just had our service charge meeting and agreed the 2011-12 budget." Residents feel comfortable asking questions at meetings with the staff from Hanover because they know them. "We have a working relationship with management and it's a much simpler task because everyone is at ease."

The new local approach to repairs has run since April 2010 and Robert has seen his bills go down as a result. "We get quality repairs and we have a say at our service charge meetings. Hanover is doing everything possible to make living on the estate a pleasurable experience."

Robert was elected residents' representative for his estate this year and makes good use of Hanover World, an online community for Hanover residents. Robert also helped his estate to apply for grant from 'Greenshoots' - Hanover's small grants fund. His estate has just been awarded £2,000 for a communal garden as a result. "We work well with Hanover and we all support each other on this estate. We're a neighbourly and caring community."

Tenant involvement

Tenants play a central role in the local offers across all standards. Not only in shaping and agreeing them in the first instance but in launching them, monitoring their progress and holding to account those responsible for delivery. In some cases, tenants got involved to a great degree and helped gather information through inspections or mystery shopping. They may have helped to deliver training to fellow tenants in order enable delivery of services that benefited them all.

This section looks at how tenants were involved in the local offers and the outcomes achieved as a result of their involvement.

Getting involved

There was no 'one-size-fits-all' mechanism to involve tenants across the trailblazers. Not every tenant wanted to or was able to take an active involvement in their trailblazer's design or delivery. One of the features was tenants' appetite to get involved in specific services, such as repairs or anti-social behaviour rather than all or nothing involvement which has previously been offered by some providers. This 'bite size' form of involvement suited many who wanted to get involved in an issue they felt a passion for but didn't necessarily want to invest their time in formal tenant structure or in influencing all landlords services. Trailblazers were often willing to experiment and to change the way they worked to get the necessary results.

Chapter 1 used very creative means to ensure the widest possible involvement from their tenants. Chapter 1 provides supported housing for a wide range of clients including single homeless people, women, families, and men fleeing domestic violence, care leavers, those with mental health issues, those with alcohol and drug issues and parents and babies.

Provider case study 7: Chapter 1 (tenant choice and customer services)



Over the year leading up to the pilot, it became apparent to Chapter 1 that there was a need to have a clearer definition of good customer service within the organisation and a set of standards to accompany them. Chapter 1's service user representative conference confirmed this as a priority but also highlighted the importance of day-to-day contact between staff and customers.

The project aimed to create a set of unique and personalised customer service standards for each of the five supported housing schemes participating in the offer. The expected result was for tenants to be more satisfied with the level of customer service received from staff and to be able to explain why they were satisfied. It was also anticipated that staff teams would have increased understanding of the needs of their tenants and

an improved ability to recognise the needs of future tenants.

Although each of the schemes worked to develop their own local offer, common themes emerged around house rules, respect between staff and residents, communication and engagement with staff and sharing of information. Involvement methods during the trailblazers were really creative and tenant-friendly, allowing the tenants to be successfully

engaged in a way that worked for them. For instance, to help people initially understand the theme of customer service, a 'silver service challenge' was held in all the participating projects. The challenge involved residents competing to see who could lay a dining table in the style of a 5-star restaurant. While residents participated in this challenge they were talked to informally about their experience of Chapter 1 customer service, wrote on a graffiti wall what they expected from the housing association and made contributions to a 'week in the life of our project' scrapbook (pictured). This simple challenge provided a way of getting people's attention, introducing them to the trailblazer and having their say.

As a result of their involvement in the local offer, residents feel, and have become, more empowered. They have a better understanding of what role they can play in Chapter 1. For example, one resident representative is now on the board of trustees, one has been involved in the annual report to tenants and some have become tenant inspectors. This encouraged others to participate, and has dispelled a few myths.

There have been other benefits. Chapter 1's tenant inspectors, trained by an external consultant, have visited projects participating in the trailblazer, inspecting them to evaluate whether tenants in that project get the customer service they want. The tenant inspections have proven to be perceptive and challenging, getting to the core of tenants' customer service needs. Richard Cummings, Service User Involvement Coordinator at Chapter 1, explains, "Because the inspectors are tenants themselves, they have been able to engage with tenants on an equal setting and have a passion for seeing quality service being delivered; they are unwavering in expecting high standards. The inspections have proven that 'hard to reach' tenants can be trained to be very effective in checking on service delivery."

In contrast, for **Tristar Homes**, better tenant involvement was about doing the simple things well:

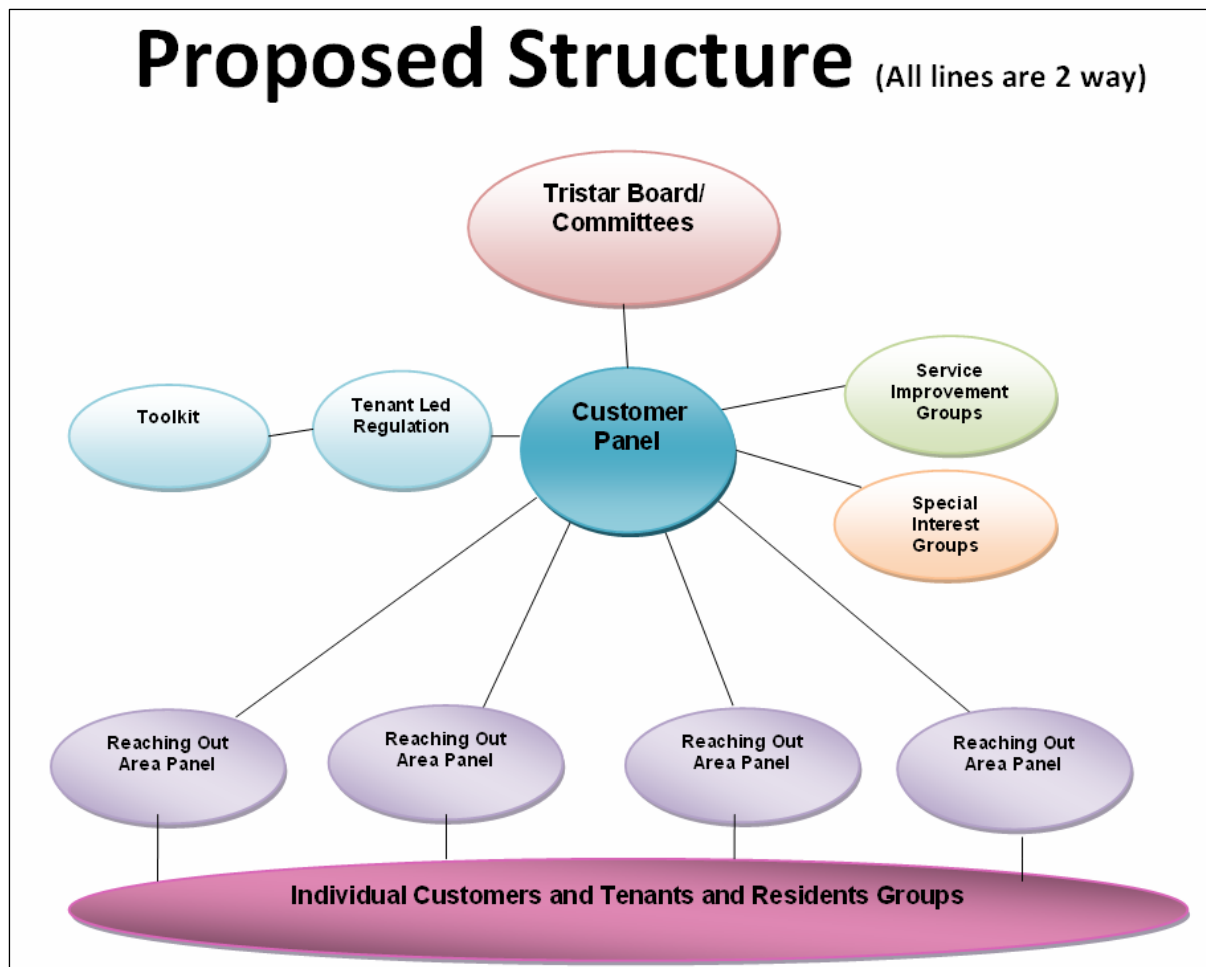
"Get the basics right with your customer representatives – communication and information is essential so take time to get it right and build trusting relationships. Treat customers as individuals and address their own needs, anxieties and aspirations."

Tristar Homes, the arm's length management agent for Stockton Council, developed a local offer to ensure the tenants in their 10,500 homes had the tools, training and capacity to prioritise and monitor local services and standards. Even though a consultation and communication embargo (due to stock transfer) did not help their efforts to consult widely in setting up the offer, they managed to embed an improved customer involvement structure that they can use in the future.

Tristar found that the changes that worked for them were relatively simple. By realising positive behaviours with the help of tenants, Tristar staff developed stronger working relationships with tenants. Tristar also supported the development of the four local 'reaching out' area panels, which now have a renegotiated role to monitor and challenge performance. Through support, capacity-building and change in staff behaviour, the trailblazer has noticed raised expectations of customers who are, as a result, being more challenging.

It is more a culture change that Tristar have achieved than a range of new engagement mechanisms or initiatives. The embedded customer involvement structure (figure 6) and the general empowerment of customers have become central to Tristar's operations and will play a central role in designing and reviewing all its future local offers and services.

Figure 6: Tristar Homes proposed customer involvement structure



Northwards Housing has a particularly positive experience of getting tenants involved and giving them the opportunity to lead upon crucial aspects of service delivery within the local offer, but based on a really simple idea.

Tenant case study 5: Northwards Housing (quality of accommodation)



Kathleen Ahmadi (pictured)

When the person who had come around to discuss Kathleen Ahmadi's new windows told her about Northwards' local offer trailblazer, she wanted to find out more. She received a letter explaining that Northwards was looking for fresh ideas around service delivery. She was invited to a coffee morning and asked to bring anyone else with an interest. Kathleen became a regular at the coffee mornings, sometimes collecting neighbours and bringing them along to give feedback on the service they receive

and plans for the local offer.

Kathleen and a fellow resident, Maureen, began going to Northwards properties with a surveyor to check for problems with windows and doors that needed addressing. Once a repair had been completed, Kathleen would go back and make sure it was of a high standard and also talk to the tenant and fill in a satisfaction survey with them.

"Sometimes I felt a bit cheeky going into people's homes but everybody is pleased with the results." She says their work on repairs and improvements helps get tenants what they want. She and Maureen enjoyed advocating on behalf of tenants and working with Northwards.

Kathleen learnt on the job and says the surveyor she worked with was supportive and took her advice seriously. Before she and Maureen began their inspections, they had a clear explanation on how it would all operate and were asked for their input.

The trailblazer has given Kathleen a better understanding of what her landlord can offer. She says some tenants wanted their front or back doors replaced because others had been given new doors. Kathleen helped to explain to people who felt they had missed out, that there was no favouritism. The residents got new doors because their old ones were in poor condition, water-logged and even rotting. "We can only step in to help where there is damage or a genuine need for improvement."

Kathleen says that being part of the local offer on service delivery has made her more inclined to get involved in future. "We helped get things done the right way and that might not have happened without us. We showed tenants the right channels to get the services they need."

She feels neighbours have appreciated the work she and Maureen have put in, especially with front and back doors. She says houses are warmer and it's done a lot of good for tenants. "The repairs were all completed to the standard Maureen and I expect in our own homes."

Barriers to involvement

Other trailblazers found that tailoring their communication to tenants earned dividends in encouraging involvement. **Bemerton Villages**, a tenant management organisation (TMO), already put tenant involvement high on their list of priorities and enjoyed a high level of satisfaction among tenants. Ironically, as satisfaction increased, gaining wide interest in their repairs local offer proved to be a problem. The TMO initially found tenants are interested in coming forward where services are below par, and therefore changed its approach with tenants.

Bemerton found success in piggy-backing discussion about the local offer onto existing well-attended meetings. In addition, Bemerton produced an easy to understand leaflet which generated a lot of interest and brought all tenants up to speed on the issues the offer aimed to address. Bemerton kept the focus on keeping things easy to understand and maintained simple, clear presentation and language throughout. Through these routes, Bemerton generated interest in its local offer and managed to engage previously uninvolved tenants.

Involving 'hard-to-reach' groups

A number of trailblazers focused wholly or partly on involving groups they had historically found 'hard-to-reach'. Most often, these groups were among the most vulnerable of the trailblazer's customers, separated by language or cultural barriers, a disability or perhaps age. Trailblazers had to change how they worked in order to engage effectively.

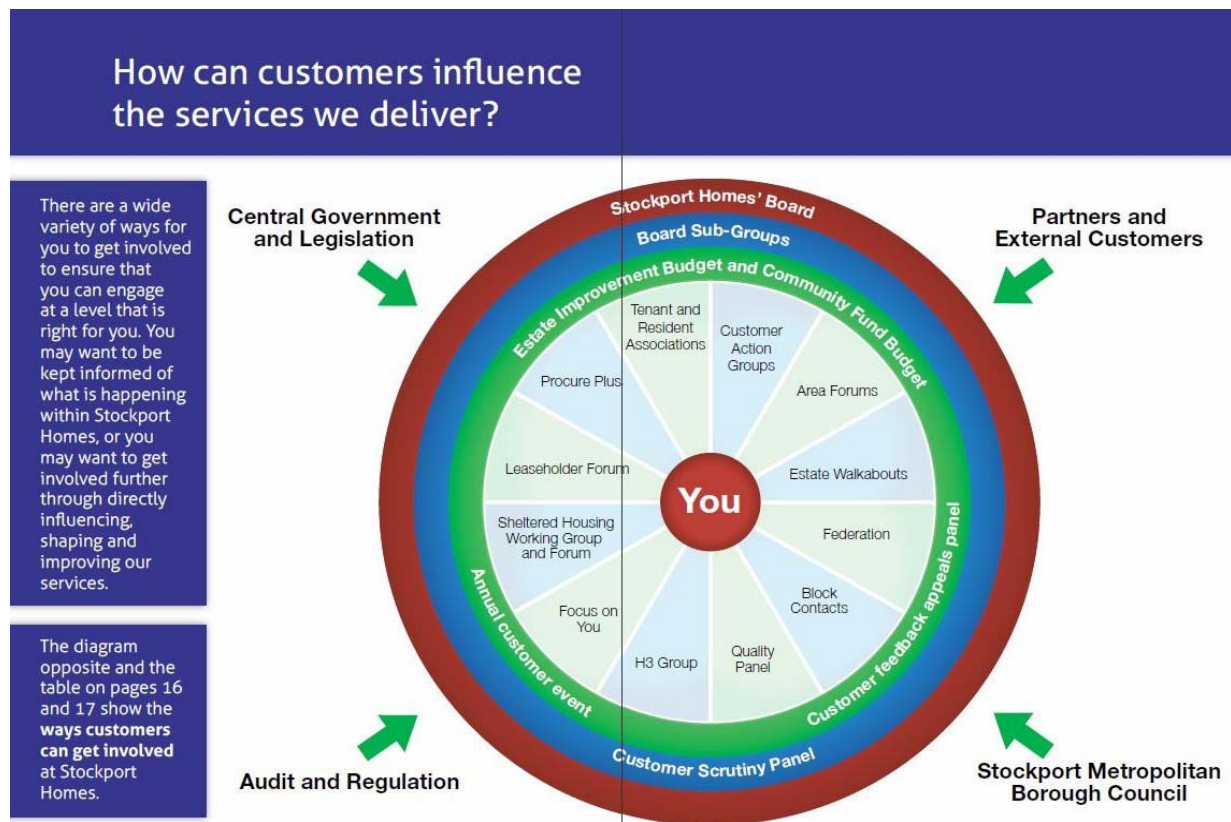
Stockport Homes developed an offer for tenant empowerment aimed at:

- Boosting tenant involvement in decision making
- Improving tenant scrutiny
- Increasing customer satisfaction with opportunities to get involved and being kept informed

Stockport Homes targeted groups it had previously found hard to reach, namely residents with disabilities, those from black and minority ethnic communities, as well as young people. Stockport Homes found paper-based surveys a wholly ineffective way to engage these groups. The ALMO switched to using a telephone survey and staff started to attend informal events such as coffee mornings, brunch clubs and residents' meetings. Not all of these events were organised by the provider, but by extending its reach in this way, Stockport Homes also improved its relationships with local networks and stakeholders.

The ALMO also made it clearer to tenants how they could get involved, as seen in its Partnership Agreement.

Figure 7: How can customers influence the services we deliver? Stockport Homes Partnership Agreement



As a direct result, the numbers of customers from 'hard-to-reach' groups involved with the landlord increased in all three of the targeted groups:

Customer group	Percentage of involved customers October 2009	Percentage of involved customers April 2010
Black Asian and minority ethnic customers (BAME)	8%	16%
Customers who have declared a disability	12%	31%
Young people aged 16-24	6%	7%

Stockport Homes saw the proportion of engaged tenants rise to 21% by April 2010, more than double its target of 10%. The lessons learned through their trailblazer experience are straightforward but effective: -

- Be prepared to contact customers using the methods they have indicated and in their preferred language – they are much more likely to respond to consultation questions.
- Not everyone understands the language of local offers and national standards. Stockport Homes overcame this by breaking down information into clear, manageable chunks and focusing on how customers wanted to see services improve and what standards they expect.

- When consulting on and developing standards, Stockport Homes used small interactive sessions, with tenants taking the lead on focus groups. They are more likely to get involved in discussions bringing tenant-led outcomes.

Bromford Group’s trailblazer was targeted particularly at vulnerable housing applicants.

Provider case study 8: Bromford Group (allocations)

Bromford Living, formerly HomeZone Living, recognised a desire across the new UChoose partnership⁴ to ensure that vulnerable applicants had greater access to the new choice based lettings process, which is predominantly internet based. The project was targeted specifically at the needs of older people, people with physical and learning disabilities and mental health issues, as well as younger people. BME populations in the LOT areas are relatively low, and these groups were targeted via focus groups to ensure fair representation.

Traditional analysis of customer satisfaction showed 100% for vulnerable applicants compared to 93.4% amongst non-vulnerable tenants. However, face-to-face discussions with service providers and users told a different story. Julie Walker, Head of Neighbourhoods at Bromford Living, said, “We concluded that the vulnerable applicants surveyed are so delighted to get a property that they may forget the pain that they went through on their customer journey”. It was important for the project to unpick the detail behind satisfaction levels to identify those areas which were challenging to vulnerable applicants.

The trailblazer aimed to introduce both an allocations local offer and a toolkit, to be developed with and for vulnerable people, both existing and future tenants, to enable them to access UChoose. The aim was to create greater choice, flexibility and mobility, a wider range of housing options and a system that is easier to understand and access.



Bromford Living held a range of focus groups, one-to-one sessions and telephone interviews, particularly targeting people with learning disabilities, physical disabilities, mental health issues, young homeless people and older people. Over 1000 emails were sent to applicants from the UChoose register. Julie Walker said, “Our supported needs tenants are not hard to engage if they have the right support and we have the right

⁴ UChoose is the CBL partnership which includes local authorities and housing associations covering Cannock Chase District Council, East Staffordshire Borough Council, Bromford Living, Lichfield District Council, North Warwickshire Borough Council, Nuneaton and Bedworth Borough Council, Rugby Borough Council, South Staffordshire Council, South Staffordshire Housing Association, Tamworth Borough Council and Trent & Dove Housing. Core partners for the project are those organisations who are live on the CBL system, namely Cannock, Bromford, Nuneaton, N Warwickshire and Rugby.

approach to it - to make engagement possible and meaningful for them. Social Services, voluntary and community groups, the CAB, and Supporting People teams have all been involved."

The outcome is not only the local offer itself (making sure applicants understand how to apply for housing and what happens when they do); it has involved tenants and residents in the process and therefore broadened their horizons. The biggest success has been the toolkit itself – a DVD, leaflets and posters aimed at helping vulnerable people apply for housing. So much so, that Bromford Living anticipates that the local offer will only be referred to if things go wrong.

Darren Jones, a **Home Group** tenant in past had been through some challenging personal circumstances and was encouraged to take a lead role in their trailblazer.

Tenant case study 6: Home Group (tenant empowerment)

Darren Jones

After years of problems with alcohol and drugs, going to college with an aim of becoming an outreach worker is the last thing that Darren Jones thought he could achieve. But, thanks to being involved with the Home Group's trailblazer focused on tenant involvement, this is exactly what Darren hopes to do next.

* *

Darren lives in sheltered housing in Leeds and as a tenant representative, was approached by Home Group to get involved in the trailblazer. His role would involve getting other tenants involved in the pilot, and making sure meetings and projects ran smoothly. He was also trained as an assessor, ensuring that both Home Group staff and tenants meet and understand the terms of the offer on tenant empowerment (shown in detail in appendix one).

"We had a year to come up with a set of standards – with a focus on tenants moving on from supported housing into their own property. Activities during the year included coming to London for a TSA workshop. I also travelled across Yorkshire to see what was going on in Home Group in other parts of the county and get feedback on what people wanted the standards to include. I found the experience to be really useful, particularly going out, meeting people and seeing how other projects work."

Over 500 people got involved in the project, which included eight assessors. Contributors were mainly supported housing tenants. "It was really difficult to begin with, it seemed like it was just a lot of paperwork, but it was great to see everybody working together and the standards finally taking shape."

"The trailblazer has been really useful. Not only has it made Home Group staff look at how they can approach things differently but tenants are also working better with staff, resulting in more joined up communication. It has also given tenants a better understanding of staff roles. Working on the trailblazer has really given me confidence and it has been so rewarding to see results. For example, at one project, there was only one payphone inside the building, which could not be accessed at weekends. The only other phone was outside the building. One older resident was particularly upset as she could not get outside, meaning that she could not speak to her daughter at the weekend. I spoke to the Business Manager for Yorkshire, explained the situation and as a result there is a new payphone in the building, which is accessible at all times. That has made me really proud."

Darren now acts as a Homelessness Person Commissioner and travels all over the country 'giving tenants a voice'. He met with social housing leader Lord Richard Best in January to give recommendations.

Using external help with engagement

Great Places brought in external help to bridge the gap between them and their 'hard-to-reach' customers. This trailblazer aimed to deliver an improved choice based lettings process in Oldham. Efficiency was certainly an important aim for Great Places; however, the LOT was originally inspired by Oldham's increasing BME population which it is estimated rose from 9% in 2001 to 19% in 2011. Oldham is a highly deprived area with clear segregations between BME and non-BME communities. It was felt that the way the scheme historically operated made it inaccessible to BME and more vulnerable groups and that it was also difficult for such groups to understand.

Peacemaker⁵ staff were brought in to talk to applicants on the day the housing list was released, which is particularly busy event for the applications office. Applicants were asked if they were willing to talk to Peacemaker staff about their experiences while at the office and this produced a large volume of responses. These and other applicants were also by phone to complete a survey or arrange a visit to undertake the survey at a later date and also invited to focus groups and workshops.

From their use of this local group, Great Places found a way to connect with BME applicants giving them a way to better understand how to make services more inclusive. They also learned more about the best ways to engage different groups, for example, they found that a high number of Bangladeshi males in particular visited the office. Great Places are continuing this consultative approach and working with groups to help ensure that younger, older, disabled and new applicants are also engaged. The resulting offer is presented at appendix one.

East Midlands HA and Foundation Housing used outside help to involve young people as part of their local offer aimed at tackling anti-social behaviour. They commissioned local organisations, Streetvibe and Black Futures to run youth workshops to generate views on ASB. However, it is mainly through specific and targeted events that the involvement of young people has been achieved. Young people took part in:

Arts and crafts	Mash up (music events)
Easter egg hunt	Environmental action days
Tubs and basket planting	'Fun on the Friths' community activities
Gardening competition	Choices (sexual health events) – delivered by Streetvibe
DJing – delivered by Streetvibe	Activity bus – delivered by Streetvibe

The events are all supported by the providers but delivered by other organisations such as the local authority, residents associations and other local groups. East Midlands and Foundation actively signpost other organisation's events and this approach is proving successful in involving young people. An active approach to tailoring engagement mechanisms to suit different groups is extended to all their tenants with similarly positive results. Examples include:

- Telephone surveys undertaken in a tenant's own language

⁵ Peacemaker is an Oldham-based group of young Asians who work to create opportunities for young people to meet and befriend other people from different communities and ethnicities.

- Floating support used to reach those tenants with disability and mental health issues
- Women only groups
- A disability service user group

Throughout the development of the local offer, East Midlands and Foundation believe they have learned to engage in better ways and gain richer feedback. They plan to repeat this approach in other areas. Detailed and high-quality feedback has allowed a full review of ASB policies and led to the group-wide introduction of measures, such as introductory tenancies. The organisations have been better able to unpick the causes of dissatisfaction, borne out in their results so far, which has seen satisfaction against ASB indicators higher within local offer trailblazer areas.

Delivering a local offer with a difference

Although not one of the most conventional local offers, The **Confederation of Co-operative housing** (CCH) developed an innovative project which resulted in an accreditation framework for housing co-ops and service providers. They relied heavily on tenants to aid the development of the framework, as well as working alongside organisations who service co-ops and other partner organisations. The project emphasises the importance of giving tenants the space and information to make informed decisions.

Provider case study 9: CCH (tenant empowerment)

CCH developed an accreditation framework for housing co-operatives and service providers. This framework intends to be central to the future regulation of the housing co-op sector, as well as strengthening standards in housing co-ops and ensuring excellence in service provision, particularly in relation to meeting the new regulatory standards.

CCH established a sounding group to guide the development of the accreditation framework. Members included tenants of co-ops, organisations servicing housing co-ops, regional and service provider based networks and other partner organisations, including the NHF, Co-operatives UK and TSA. Tenants directly assessed and monitored the development of the framework in addition to direct monitoring by the CCH's tenant Chair and indirect monitoring by its tenant-controlled general council.

The project demonstrated a real appetite from housing co-ops and organisations that provide services to them to be actively involved in shaping frameworks. Much discussion and interest has been generated among housing co-ops who are not directly involved as information about this project has begun to be disseminated by CCH.

CCH has established registers for housing co-operatives and service providers that have begun the accreditation process, and provide advice to a number of organisations about the accreditation process. The number registered is steadily rising and is expected to increase further.

"Such a large number of organisations have signed up to the accreditation scheme outside of the immediate network (those that CCH would normally have day-to-day contact with). The ultimate success [of the project] would be to reduce the regulatory burden and negative perception of co-ops amongst the sector as a whole" Blaise Lambert, CCH.

Conclusion

Throughout this report, those involved in the trailblazers speak for themselves. The TSA set out a clear framework for offers, but it is the tenants and staff at trailblazers who have explored how this might work in their local area. Each area is different and each offer is different. The materials at appendix one and two include a lot of information for those interested in following up how individual offers shape up.

It is not for the regulator to analyse and direct how offers develop, but these are the common issues highlighted by the trailblazers, and we offer the following as a summary: -

- **Performance measurement** – for many trailblazers this took up a great deal of time, especially in deriving locally based information from performance management systems designed to work on the scale of a whole provider. Multi landlord partnerships found this an especially challenging area not only in agreeing metrics, but also standards which would be challenging and achievable. Some providers were at very different starting points! Local performance reporting allowed, often for the first time, both tenants and providers to challenge inputs and outcomes. Performance against targets was reported in imaginative ways including estate notice boards and in communal areas. One particular approach set standards for a whole village and captured the aspirations of owner occupiers and tenants for the whole community
- **Partnership working** – multi landlord offers made up just under half of the trailblazers. They were the most difficult to launch, but generally speaking also the most successful in terms of rigorous challenge and outcomes. Bristol housing partnership for example achieved numerous efficiencies and a simplified city-wide approach to disabled adaptations. The East Midlands trailblazer included partners beyond housing providers to join-up responses to anti-social behaviour.
- **Value for money** – was for most trailblazers still a largely undeveloped area. Many planned efficiencies are long-term, beyond the first year of the offer. Some identified efficiencies in terms of re-aligning services and delivering more for less including Town and Country who have made their estate teams more visible and accountable to tenants.
- **Tenant involvement** – the first trailblazer report highlighted the role of previously uninvolved tenants in agreeing local offers. Many have gone on to fill monitoring or scrutiny roles, enjoying involvement in issues they are interested in rather than the 'all or nothing' approach some had experienced. Tenants were variously involved as liaison points for capital projects (Northwards), mystery shoppers (Derwent and Solway, Halton and others) and scrutiny (Wolverhampton Homes, Stockport Homes and others).
- **Shared priorities.** For many trailblazers the offers allowed a detailed examination, often for the first time, of what tenants want on a local basis. Tenants didn't want the earth. Many trailblazers and tenants reported a two-way street in terms of their involvement. Tenants were challenging and wanted to understand and change services, but in going through the process they also helped to explain decisions made to other tenants and the reasoning behind some necessary compromises

- **How local?** The trailblazers debated many issues among themselves including just how an offer could be truly localist. Views differed, but the majority believe local offers should be more than a re-badging of corporate standards. Is an offer such as “we will inspect your estate once a month” enough? Many moved on from this position to create an offer more closely aligned to a local views and an efficient use of resources. Trailblazers felt, using this example, that an offer on estate inspections should include the outcome desired (perhaps the achievement of a particular score on a locally agreed scoring system). Scores below a particular level may trigger consultation to find out what is going wrong and then to address the issue, whereas high scores might mean inspections take place less frequently in order to direct resources where they can be put to best use.

The appendices contain a greater depth of information than is possible in a report. This includes the wording of local offers, a summary of the aims of each offer, contact details, plus further resources. A report can summarise learning but cannot capture the individual experiences of each of the trailblazers. If you are serious about refining and extending your offer there is no substitute to speaking to those at the leading edge. They would be pleased to hear from you.

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Local offer trailblazers - from planning to practice

This is the TSA's second report on local offer trailblazers and looks at how the trailblazers have moved from discussion, and agreement of offers to their operation. This report gives both tenants and providers the opportunity to speak for themselves about their unique experiences.



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