



REPORT FROM TLSG - HOUSING HOME CHECKS SERVICE

Scrutiny Document -February 2023

Tenant & Leaseholder Scrutiny Group

Tenant & Leaseholder Scrutiny Group Report on Sandwell Council's Housing Home Checks Service

1. PURPOSE OF THE REPORT

1.1 The Tenant and Leaseholder Scrutiny Group (TLSG) wanted to test and scrutinise the Home Checks service to ensure that the whole Home Checks process is fair, transparent, beneficial, and fit for purpose to all Council tenants and the Council.

1.2 To provide a comprehensive review of the potential issues (if any) affecting the effectiveness of the Home Checks Services provided.

1.3 The group's aims are to suggest positive changes and improvements based on an evidence-based approach to ensure tenants have the best experience possible from the process.

2. BACKGROUND & CONTEXT

a. The Home Checks service involves Neighbourhood Officers visiting the tenant in their home to carry out a comprehensive tenancy check. This involves a conversation with the tenant in their home to gather information about the state/upkeep of the property, the tenant's wellbeing and any support required that will improve their quality of life. This information is recorded via an online form which is completed during the visit. Depending on the responses to the questions, the form has a series of prompts to assist the Officer in advising the tenant. As well as collecting information the Home Check visit is seen as an opportunity for the Neighbourhood Officers to build relationships between themselves and tenants.

b. Whilst at the property, based on tenants' responses to the questions, the Officer's observations and the condition of the property, the tenancy will be assessed and given a traffic light category (Red, Amber or Green - otherwise known as RAG) to prioritise any further action that may be required,.

c. The TLSG felt that scrutiny of Home Checks at the relatively early stages of a new service which is gathering detailed information about Sandwell council tenants and council housing stock provided an opportunity to

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implement any agreed changes before the process is fully embedded.

3. **METHODOLOGY**

The group chose a variety of methods to test and scrutinise the service including:

3.1 Compile and assess a tenant Home Check Survey – A user friendly questionnaire was compiled with a covering introduction from the Chair of the TLSG requesting tenants complete a survey to support the improvement of the service. It was sent out to 300 tenants who had had a home check from its start in January 2022 up to the 2nd September 2022. To maintain data protection the surveys were sent to the tenants by the Council via email or text message . The survey ran for approximately 10 days and asked questions about their customer experience. The anonymous responses to the survey were received and analysed by the Vice Chair.

3.2 Staff Interviews – A subgroup of TLSG constructed a questionnaire to gain a perspective from staff around their views of the processes used, third person views on the pros and cons to the Home Checks, and to gather any suggestions and/or recommendations they thought would improve the service. Staff were approached across the borough to monitor any differences in delivery of the service.

3.3 Desk Top Evidence – the group received a detailed presentation on the service, how it is delivered, measured, and monitored. They then requested key documents and evidence to enable them to assess and evaluate the service.

This included:

- The reasoning behind establishing Home Checks
- The resources in terms of staff required
- The roll out and timescales of Home Checks to all tenants
- The measures used to test customer satisfaction
- The linkages made to other departments and agencies to ensure a holistic approach was taken
- Training undertaken by Housing Staff to enable them to deal with any major issues raised during Home Check

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3.4 Review of the Home Checks Form and relevance of Information requested - As part of the scoping exercise members of TLSG had some initial discussions about the useful information they would expect the Neighbourhood Officer to provide based on the questions being asked of the tenant.

It was agreed two members of Scrutiny would do a more in depth review of the form looking not only at the relevance and logic of the questions asked and the answer options but also the sequence, the grammar and if anything was potentially missing. This review was carried out using on a word version of the form provided to TLSG by the service.

3.5 Analysis of the Home Check experience - In addition to the surveys we were able to call on the direct experience of two members of the group who had previously had a home check. Two additional members of the group attempted to book a Home Check but only one was carried out prior to this report.

4 FINDINGS

4.1 Tenant Home Check Survey

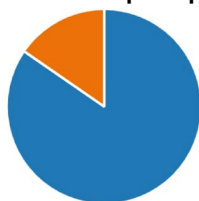
From the 300 surveys issued 13 tenants responded.

This response rate, although disappointing for us, amounts to a return of 5% which is considered an acceptable response rate. (See appendix 1 of the Tenant Survey for Results).

We believe the low response rate may be because tenants are not fully aware of the work the group is doing.

The responses from tenants indicated that the tenants were generally happy with the visit.

11 out of 13 people understood the purpose of the visit

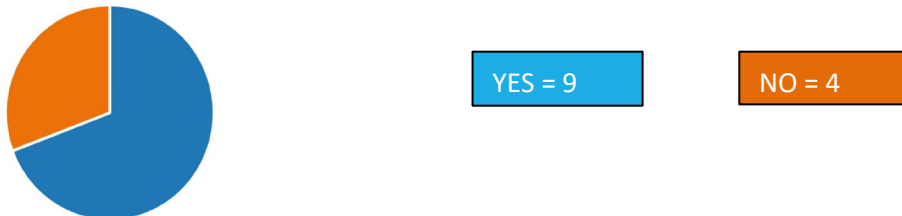


YES = 11

NO = 2

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However, to the question – Did the Neighbourhood Officer explain what action(s) if any would take place following the interview? Only 9 of the tenants responded yes.



4.2 Staff Interviews

A sub-group of the TLSG interviewed 2 Neighbourhood Officers, based in different parts of the borough. (See Appendix 2 - Staff Interview). The main findings were:

4.2.1 - Staff were professional and very experienced.

4.2.3 - Staff regarded Home Checks as very much part of their “day job”.

4.2.4 - Staff were updated on processes but there was no training around Customer Service. It was almost a ‘given’ that they would not need this as they were experienced Neighbourhood Officers.

4.2.5 – Visits are booked as either morning or afternoon timeslots.

4.2.6 - There is no clear instruction on how the visit should be conducted. For example, it is currently down to the Officer whether they will use children under 16 to act as interpreters during a home check visit.

4.2.7 - Officers are not very aware of activities or support provided via the voluntary sector. The online form prompts the Officer to promote the Route2Wellbeing website to tenants however, some of the information on this website is out of date

4.2.8 - It is not clear whether Officers should follow up on any non-housing related issues that come out of the Home Check or any related referrals

4.2.9 - There is no clear guidance on supporting tenants if there is an issue raised during the Home Check with the services they receive e.g. repairs or problems with MySandwell portal not working

4.2.10 - the Officers interviewed were very positive about undertaking Home Check visits

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4.3 Desk Top Evidence

4.3.1 - Review of the Home Checks Form

4.3.1a - From Group Discussion

- The prompts in the form do not provide much information for families or children in general
- The form lacks information that links to Safeguarding for both children and adults
 - There is no information covering Domestic Violence (DV) or Sandwell Children's Trust (SCT)
 - There is no information with links to NHS, addiction services etc
 - There is no information regarding where to go or search for support to learn English

4.3.1b Observations on the Home Checks Form and relevance of Information (See appendix 3 Home Checks form)

A couple of members of scrutiny reviewed the contents of the Home Checks form in detail and made a number of observations. Some of these include:

- No room for free text to note any issues that do not fit into the dropdown options to all the questions in the form
- No indication in the form as to what form of ID is acceptable
- If someone indicates they do not have ICT skills and/or equipment, shouldn't the advice dropdown include a link to services/community groups that have equipment and/or provide training?
- The TLSG members felt the issues of under- occupancy and the taking in of lodgers in section 2 are quite complex and probably need to be discussed as a separate issue outside of the Home Checks visit.
- Some questions raised seem irrelevant or unclear e.g. "In section 3 – Wellbeing - what is the relevance of the "Have you met your neighbours?" question?
- Also grouped into one question is "Do you know where your local shops, leisure facilities and health facilities are located?". What if the answer is yes to only one part of the question?
- Section 4, questions are poorly worded and make assumptions that tenants are in need of benefits and/or are in arrears.

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- Do Officers check records before going out to know if a question is relevant or not e.g. is the rent account checked before a visit to check if the tenant uses Direct Debit?
- There is no specific question about car ownership, this seems an omission considering parking tends to be an issue in many neighbourhoods and estates.
- A lot of the support that seems to be offered to tenants in the Home Check visit appears to be on-line. It is not clear how Officers will support or provide information to tenants who either do not have access to or do not know how to use technology.

4.3.2 Home Checks Training Information supplied

- No information was supplied on what, if any, mandatory training Officers undertake either as one off or regular basis such as personal safety, customer care or preparation for home visits.
- The PowerPoint presentation received on staff training, related only to the why Home Checks have been introduced and a run through of the questions in the online form. So, there is no indication that staff are suitably trained to potentially have difficult conversations with tenants
- From the information provided it is not clear whether there is a skills audit of staff who undertake the Home Checks, especially considering the restructure taking place which will appoint Housing Services Officers who will have Home Checks as one of their main roles.

4.3.3 Support for Tenant with English not their first language/ Learning Disability/other disabilities

- There is no clear process for supporting those tenants whose first language is not English. A translation/interpreter service is offered but the Service is not sure if all staff are aware of this. Family members are often used but there is no guidance on the minimum age of any children who may be asked to translate
- There is no clear guidance on engaging with tenants with learning difficulties. Again, there is a reliance on family and friends, but it is not clear who would be invited to support the tenant if this support is unsuitable or unavailable.

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4.3.4 Formal Feedback to tenants following the Home Check

There is no facility for tenants to request and be issued with a copy of the Home Check form including the Assessment and/or explanation of the rating the tenancy has been awarded.

4.3.5 Understanding the RAG scoring rating

There is no documented guidance on the RAG Scoring mechanism. The decision/scoring by the Officer appears to be solely based on their personal opinion.

4.3.6 Figures on 'No shows'

This is not recorded at present

4.3.7 Provision of Home Checks outside of office hours

At the moment Home Checks are only carried out during normal office hours. This may be an issue for people who are working or who have other commitments during the day.

4.3.8 Dynamic Resource Scheduling

The Group has been advised that there is a plan to introduce Dynamic Resource Scheduling to the process. This will allow tenants to receive text message alerts about their appointments and confirm the time band in which the Officer is expected to arrive.

4.3.9 Key Performance indicators (KPI's)

There are currently no Key Performance Indicators to benchmark Home Checks. For example, there is no information on the number of "no shows".

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4.4 Analysis of the Home Check experience

Comments, conclusions, and recommendations were also drawn from the 2 scrutiny members who had previously received a Home Check and one member who received a Home Check visit during scrutinising the service. Unfortunately, another member's visit was cancelled and not re-arranged in time for the report deadline. As with tenants who took part in the survey the overall experience was positive, but they felt changes could be made to improve the experience for tenants.

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RECOMMENDATIONS

| NO. | Related to Findings | Area Change Suggested | Recommendation | Service area response |
|-----|---------------------|--------------------------|--|--|
| 1 | 4.1 & 4.2.8 | Tenant Home Check Survey | Housing to start sending out, as soon as possible, copies of completed Home Check forms to all tenants who have received a visit to date | Agreed that we need to provide either a copy of full Home Check or the agreed actions. |
| 2 | 4.3.1a | Home Check Form | Source a more comprehensive list to signpost tenants e.g. organisations that support children and families, NHS, Sandwell Children's Trust, addiction services in addition to SCVO's Route2wellbeing | The form cannot physically illustrate all of the potential pathways that could result from a HC. Our internal intranet page has many more resources available for officers to use and these will be reviewed quarterly with officers to ensure the main referral pathways are most relevant, identify new resources that become available and ensure appropriate staff training to support this. |
| 3 | 4.3.1b | Home Check Form | If someone indicates they do not have IT or do not know how to use technology Officers should have information to signpost tenants to organisations that can assist with equipment or provide training | There are already questions on the form to identify if tenants need help. We will check and confirm where tenants are referred to if they need support |
| 4 | 4.3.1b | Home Checks Form | Add in room for free text to note any issues which do not fit into the dropdown options | The form contains a number of free text boxes at different stages, which are not always displayed on printed version of the form. |
| 5 | 4.3.1b | Home Checks Form | What forms of ID would be acceptable to be made clear | The HSO would explain which type of ID would be suitable this during the Home Check meeting |

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| | | | | – the types of ID differ depending on the customer's circumstances and officers will be trained to ensure they are familiar with this. |
| 6 | 4.3.1b | Home Checks Form | Consideration be given to providing advice on Under-occupancy and Taking in a Lodger to be part of a follow up to the Home Checks visit so that the tenant is properly informed | Officers are trained to give basic advice on these issues, and to advise the tenant where to get further information if required. |
| 7 | 4.3.1b | Home Checks Form | Consideration to be given to re-wording the questions in section 4 to add Not Applicable options | The printed version of the form does not reflect all of the options available for officers to choose from. |
| 8 | 4.3.1b | Home Checks Form | Consideration to be given to adding a question about car ownership including providing information on renting council garages | Not sure what we would do with the information about car ownership, which in itself is not a tenancy issue. We will add a question regarding interest in renting a garage and ensure officers are trained that garages can be used for any storage, not just for vehicles. |
| 9 | 4.3.2 | Staff Training | Provide TLSG with details of all mandatory training staff receive or will receive to ensure they are suitably prepared to undertake Home Check visits | We have provided the slide set that is used to frame the conversations in the Home Check training sessions, however it is not possible for one module to cover the full depth of knowledge that officers require to conduct a Home Check - this would be gathered from the range of modules that are provided for officers. A training plan is being developed for the job group which will be shared with the TLSG. |
| 10 | 4.3.2 | Staff Training | To provide details to TLSG of any skills audit undertaken during the | Most officers undertaking HCs post-restructure were also doing them before. The capability of |

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| | | | restructuring process to ensure that Housing Services Officers have the necessary experience/skills and/or training | new officers was assessed via a selection process. All officers (old and new) were provided with training on Home Checks and key policies and procedures. |
| 11 | 4.3.2 | Staff Training | To "build-in" Customer Service into staff competency and professional training | HSOs receive a series of training modules on case management, which includes keeping customers informed and updated. Further training is being planned on Psychologically Informed Environments (PIE). |
| 12 | 4.2.7 | Staff Training | Build-in to staff training awareness of Community/Voluntary Groups in the neighbourhood they are working within to support tenants in getting involved to reduce loneliness, creating active communities. | We would expect officers to be aware of the active groups in their patch, as they work closely with the Community Partnerships officers. We will ask Community Partnerships team to provide further training to officers, particularly around boroughwide groups |
| 13 | 4.2.6 & 4.3.3 | Support for Tenants where English is not their first language or have a learning disability/other disability | Review the use of family and friends as interpreters as this may not always be appropriate. In those cases, and if professional interpreters cannot be used consideration should be given to the use of technology to communicate with tenants | Agreed that we will review our approach and access to interpreter services to ensure it reflects best practice. |
| 14 | 4.2.6 & 4.3.3 | Support for Tenants where English is not their first language or have a Learning | Specifically review the use of children under 16 acting as interpreters in the Home Check which includes sensitive questions | We will review our approach as per 13 above. |

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| | | Disability/other disability | | |
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| 15 | 4.2.5 & 4.3.7 | Home Checks Process | Tenants need to have a choice of availability of evening and weekend Home Checks to ensure there is a facility for tenants who are working, have family commitments and caring responsibilities. | Agreed that we need to look at how we ensure Home Checks are accessible to all, however moving to an evening and weekend service for a non-urgent task would have a considerable impact on staffing budgets and employee Ts & Cs. |
| 16 | 4.3.8 | Home Checks Process | To ensure that the 'Dynamic Resource Scheduling' element is implemented as soon as possible to ensure appointments are managed and tenant friendly in terms of the availability of time slots | Agreed. |
| 17 | 4.2.5 & 4.3.7 | Home Checks Process | To continue with Home Check visits either in person or, as technology progresses, to offer choices of either Zoom, Teams or any other video conferencing platforms offering choice, depending on the tenant's preferred choice. IT should not be a default mechanism but a choice and should only be rolled out when the process is tried and tested | We consider the in-person method of conducting a Home Check to be essential. This is to build rapport between the tenant and the officer, to ensure a thorough inspection of the property, and to spot potential safeguarding issues. Follow up visits do not necessarily need to be in person – telephone/virtual methods can be used where appropriate. |
| 18 | 4.2.7 & 4.2.8 | Home Checks Process | Agree the approach for staff to support tenants after the visit e.g. re-visiting to offer support in using MySandwell | This is covered in the agreed actions box at the end of the check. The HSO will revisit as required to support on any tenancy |

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| | | | portal and any other self-referral route to support independence | management issues but would handover on-going support to other relevant agencies following referral. |
| 19 | 4.3.1b | Home Checks Process | Ensure preparation and back office checks are carried out prior to a visit. For example, if a tenant pays by Direct Debit, they may not be in arrears just 'technical arrears' based on when the rent is debited from their bank account. They shouldn't then be told they are in arrears which may cause unnecessary distress or confusion | Background system checks are undertaken before the visit. We would expect officers to discuss rent debit and payment cycles with the tenant, so they are understood. However, it is now a tenancy condition that an account should not fall into debit for any period, and that the tenant should ensure that there is sufficient credit on the account to prevent this. Further training is planned to ensure officers convey this to tenants correctly without causing alarm. |
| 20 | 4.1 | Home Checks Process | Officers to be provided with additional information to signpost tenants who, as a result of the Home Check visit, are required to decorate their homes as they may be on a limited budget. Perhaps link with local schemes or organisations | As per recommendation 2, we will regularly review the main referral pathways to ensure these are most relevant. |
| 21 | 4.3.4 | Formal Feedback to tenants | The service to promote to tenants the option to request a copy of their Home Check form including the assessment and rating the tenancy has been awarded | Agreed – see recommendation 1 |
| 22 | 4.3.5 | Understanding the RAG Scoring Rating | Produce some guidance that can be given to tenants on the scoring mechanism and potential follow ups | Agreed – tenants should be provided with an explanation of the RAG rating, how it was arrived at and what this means going forward. |

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| | | | depending on rating used when Home Checks are carried out. | We will address this as part of recommendation 1. |
| 23 | 4.3.6 | No Shows | To start recording 'no shows' with an Action Plan to support/deal with persistent tenants. | Agreed that we need to have an escalation process for completing Home Checks to tenancies who are not engaging. |
| 24 | 4.3.9 | Key Performance Indicators (KPIs) | For the TLSG to be informed of Home Check KPI's with results for comparison to check against. | Performance reports for Home Checks are still under development, we will share these with the TLSG once they are in place. |
| 25 | 4.1 & 4.4 | Review Home Checks Process | To continuously look at reviewing the Home Checks process by requesting input from tenants that have had a Home Check experience to keep up to date with changes in tenants' needs and aspirations of the service | We have recently introduced a satisfaction survey for Home Checks and will use this feedback to continuously review the service. |