



**Customer & Communities Committee**

**1. Cover Report**

<b>Date</b>	November 2023
<b>Agenda Item &amp; Title</b>	<b>Tenancy Audit Review</b>
<b>Report Ask /Purpose</b>	For Discussion
<b>Forward Planner</b>	Standing Item Quarterly Information
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<b>Confidential</b>	Not Confidential
<b>Recommendation</b>	Members are asked to note and comment on the report.

**Fits with Corporate Plan**



**Narrative: By producing this report it links into the corporate plan by doing the decent thing and focusing on our customers, working with customers to strengthen our business and offering a broad range of homes and support for people**

**Link to Strategic Risk Register**

<input type="checkbox"/> COVID 19 - Pandemic Impact	<input type="checkbox"/> 1. Safeguarding tenants
<input type="checkbox"/> 2. Health and safety compliance	<input type="checkbox"/> 3. Income collection and customer financial hardship
<input type="checkbox"/> 4. Government policy	<input type="checkbox"/> 5. Sector Reputational Risk
<input type="checkbox"/> 6. Cyber and Data Security plus GDPR imp	<input type="checkbox"/> 7. Business continuity
<input type="checkbox"/> 8. Long Term Funding and financial viability	<input type="checkbox"/> 9. Growth and Partnerships
<input type="checkbox"/> 10. Asset management	<input checked="" type="checkbox"/> 11. Property services
<input type="checkbox"/> 12. Safeguarding staff and loss of skills	<input checked="" type="checkbox"/> 13. Regulatory and legal compliance

**Risk Appetite:** No associated risks.

**VFM** Neighbourhood services remain under review to ensure VFM is achieved in operational delivery and forms part of MSV’s VFM strategy.

**Financial Implications** Financial implications from any recommendations are managed by the Neighbourhoods and Communities directorate. Controls are in place to ensure spend is monitored in year spend to manage any potential overspends.

<b>EDI Impact</b>	Equality, diversity, and inclusion underpins all work undertaken by Scrutiny and the services are tailored according to the customers' needs.	<b>EIA Attached?</b>	NO
<b>Consultation &amp; Engagement</b>	Reviewed by customers with the support from MSV's Customer Insight Coordinator. Engaged with both colleagues and customers throughout the process.		
<b>Environmental &amp; sustainability</b>	Neighbourhood services remain under review to ensure all operations consider the environmental and sustainability impact.		
<b>1.1 Executive Summary</b>			
<ul style="list-style-type: none"> <li>Customer volunteers from MSV's Scrutiny panel carried out a review on our Tenancy Audit process from August to October 2023. The report provides a summary of the review and recommendations based on the findings.</li> </ul>			

## 2. Report

### Introduction

MSV's Scrutiny panel is a collective group of customer volunteers who are interested in helping us to improve our services. Eight members of the group volunteered to participate in this review.

A key focus is to increase membership to ensure reviews best reflect our customer profile. MSV's digital scrutiny group meet virtually, with one face to face meeting per review (when suitable). Each member has the option to loan a device to use for the review and access 'digital skills' training.

Since this review started, we have recruited one additional customer who has joined the Scrutiny 'pool', which now has 16 members. Customers can select the reviews they would like to take part in, allowing them to volunteer at times to suit their own personal commitments.

Members have been proactive this year, attending the Annual TPAS Conference in July and due to attend the Scrutiny conference in October, to celebrate scrutiny week (2nd – 6th October 2023). Several members of the Customer Engagement team also attended TPAS workshops focusing on the new consumer standards and consultation.

### Aims of the Review

The scrutiny panel agreed to explore the customer journey focusing on the tenancy audit experience from start to finish, identifying any gaps in the service.

This included:

- Accessing all relevant policies and procedures.
- Efficiency of the data collection method
- Establishing how effective communications sent to customers are related to tenancy audit.
- Explore methods used to contact customers.
- Explore best practice in relation to EDI.

### The Review

The exercise launched in August 2023, to enable the panel members to carry out a thorough review of the service area, we sought documents and liaised with key colleagues throughout, including:

- Tenancy Audit Policy and Procedure
- No Access Policy
- KPI's for 2022 -2023

- Communications sent to customers (letters and text messages)
- Tenancy Audit database and training for the database

Members scrutinised the information provided, which led them to interview colleagues from across the business to gain further understanding about the current service and answer any questions or queries. A total of five colleagues from Neighbourhoods took part in the face-to-face discussions.

## Findings and Recommendations

The group highlighted the following areas of good practice.

- The Tenancy Audit Policy and Procedure is well written and relevant.
- Neighbourhood Officers were knowledgeable in this area.
- The number of visits carried out by officers were achievable and realistic.

The group developed a list of recommendations to be considered, which have been reviewed by colleagues in Neighbourhoods.

Based on the review findings, the panel would like to recommend the following changes to help improve the customer experience when arranging a tenancy audit at their home.

1. Alterations to the text in the template letters sent to MSV tenants when making an appointment, and include the following:
  - The purpose of the visit e.g., repairs/disrepair, support needs.
  - Intention to take pictures where appropriate.
  - Make it clear; the customer should contact their Neighbourhood Officer within 7 days of receiving the letter to rearrange an appointment if the date suggested is not convenient.
2. The following questions asked during an audit should be altered or include:
  - Do you have any additional support needs?
  - MSV should include a question, asking the customer directly, whether they define themselves or a member of their household as vulnerable.
  - Gender for both the customers and all household members.
  - Preferred method of communication for future correspondence and language.
  - Include a clear definition of Resident Engagement and list the different areas customers can get involved in e.g., Scrutiny Panel, Residents Groups, Community Projects / Hubs.
  - Under/over occupation of property.
  - Updated next of kin question to be included.
  - The tenancy Audit proforma should include all relevant EDI questions.
3. MSV should write into the policy – the requirements to signpost to other teams and external agencies, where a need has been identified.
4. Neighbourhood Officer's should carry out on spec visits where appropriate.
5. The principles of the Tenancy Audit must be reflected in the 6 week and 9-month visit.
6. MSV should use the term customers. It is universal and provides a more streamlined service.
7. MSV should review the current name of the audit process.
8. MSV should provide Neighbourhood Officer's with iPads to enable them to complete and upload a digital proforma whilst on site.

## Neighbourhood and Wellbeing Update

The recommendations form part of MSV's and Neighbourhoods commitment to improve services and the customer experience. This is done by ensuring the customer voice is at the heart of what we do and is reflected throughout the business, frontline and office-based staff, top down and bottom up.

The co-creation of the tenancy audit policy has been updated to reflect the customer voice and needs. Included in the recommendations are key themes to improve the service by focusing on people and processes, through accurate data gathering, improved databases and recording and reporting.

Our Neighbourhood teams continue to deliver key frontline services for our customers and will continue to do so at a time when demand on services is increasing. They continue to adapt to the needs of the business and customers, by proactively looking at the way they work, being flexible in their approach and building capacity amongst the teams.

The work our Neighbourhood teams deliver continues to be reviewed considering new demands amongst our customers, staff and sector has a whole.

Several key actions have been completed to improve services:

- Recruitment drive to improve capacity amongst staff.
- Training on cause for concern to identify and support vulnerable customers.
- More collaboration amongst departments/teams e.g., Winter Welfare campaign
- Co-creation of key policies and procedures e.g., Mutual Exchange

## Next Steps

- MSV's Group Chief Executive, Head of Property Services and the Head of Customer Experience to attend the next scrutiny panel on the 16<sup>th</sup> November 2023 to update members on recommendations, service changes and any further updates.
- The Scrutiny Panel to receive regular updates relating to the Tenancy Audit Processes from department lead, first update due in January 2024.
- Work with panel members to review the process used to carry out the review, implementing any improvements on any future work of the group.
- Scrutiny to receive a copy of the amended letters, policy and proforma.
- Subject to approval the recruitment of a Right Sizing Officer to address the issues of over and under occupation in our properties.

### 3. Recommendation

To note and comment on the contents of this report

### 4. Further Supporting Information

Appendix 1 – Full panel recommendations