

First Year Annual Reports to Tenants: tenant perspectives

A good start, but could do better





Funded by the TSA Tenant Excellence Fund



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A good start, but could do better

This is a report by the 4 National Tenant Organisations (NTOs) reviewing the first year “annual reports to tenants” produced by housing associations, councils and ALMOs.

The review is intended to provide a tenant perspective on these first annual reports. It identifies trends in the reports, things we have considered have been done well, and things we didn't like. We undertook this review with assistance from a number of people - tenants, landlords, other organisations working in the housing sector and the TSA. Our objective is to assist tenants and landlords improve the reports next time round.

This is year one for annual reports, and they were produced as the regulatory system was changing, and against a backdrop of limited resources, particularly in the council sector. It is a credit that landlords have produced annual reports.

However, our overall assessment of the reports is that on average they are just under adequate, and our hope is that our review will assist tenants and landlords produce better reports next year.

Registered Provider is a name given by the Tenant Services Authority to council and housing association landlords. We have used the term “landlord” in this report because this is better understood by tenants. The report also refers to Arms Length Management Organisations (ALMOs) who provide some or all of a council landlord's housing management services. In most but not all cases where an ALMO provides services, annual reports may have been developed by the ALMO rather than the Council landlord, but the Council still has the responsibility to produce the report.

The *National Tenant Organisations* are the four national tenant organisations with either exclusively or predominantly tenant memberships – CCH, NFTMO, TAROE, TPAS. Further information on these organisations is available at the end of this report.

WHATS IN THIS REPORT?

To view a particular chapter of this report
please click on the relevant section below

Heading	What's it about?	Page number
The importance of annual reports to tenants	A section setting out background issues and why annual reports are important	5
Key points from our review	A summary of the key conclusions from our review	7
How we did the review	The "methodology" of how we carried out the review, and details of our 1 to 5 scoring system	11
What we were looking for from reports	A section setting out what we were looking for in the reports and the questions we were asking	12
The results of our review	An analysis of the results of our review	17
What we liked	A section setting out the things we liked in reports, highlighting reports that did well against our questions	21
What we didn't like	A section setting out the things that really annoyed us	55
What can you do now	Some suggestions regarding what tenants and landlords can do to improve accountability to tenants	57
The reports we reviewed	A listing of the reports we reviewed, and web addresses for reports we recommend	59
Our review team & our reading group	A listing of our review team and our reading group members	65
The national tenant organisations	A brief summary of who we are and how you can contact us	66



THE IMPORTANCE OF ANNUAL REPORTS TO TENANTS

Landlords were required by the TSA to produce annual reports to tenants in October 2010 at a time when changes to the way that landlords are regulated were already anticipated. We now know that the TSA will come to an end in April 2012, and the regulation of the governance and viability of housing associations will be transferred to the Homes & Communities Agency. Even more than the TSA intended it, ensuring the quality of services received by tenants will now be the role of tenants and landlords working together.


It may be the case that some landlords saw the planned regulatory changes as a lessening of regulatory requirements to enable tenants to hold them to account, and some may have placed less emphasis on the production of annual reports to tenants because of this.

However, Housing Minister the Right Hon Grant Shapps MP has made it clear that Government wants tenants to be able to be more involved in scrutinising landlord performance and to have more “empowerment” opportunities than they have now. He has also made it clear that, whilst it may be amended, the TSA standards framework, developed in 2009/10 with unprecedented support of tenants and landlords, will remain and landlords will still have to comply with it.

Better landlords were already producing annual reports to their tenants before it became a regulatory requirement, but it has been a good thing that all landlords have now been required to produce one. But we point out in this report that landlords who have produced annual reports solely because of the regulatory requirement are not getting it yet.

If done properly, the process to produce annual reports to tenants should be valuable to any landlord because:

- **they are part of the means for tenants to scrutinise the performance of their landlord, to compare performance with other landlords, and to hold them to account for under performance**
- **they should be an integral part of a landlord’s business planning – identifying with tenants the priorities for the forthcoming year**

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- **they should help landlords and tenants work together to identify how to get better value out of the rents paid by tenants, particularly important at the moment**
 - **they should be a means for tenants and landlords to have a stock take on diversity issues – identifying whether landlords are addressing the needs and aspirations of all of the existing and prospective tenant constituency**

It will remain a regulatory requirement that landlords will produce annual reports to their tenants in 2011, and the TSA will still be in place at that time to receive them from landlords. Based on the evidence we have gathered on annual reports from 2010, it probably needs to remain a regulatory requirement to produce annual reports to tenants for the foreseeable future.

But our challenge to the housing association and council housing sectors and their tenants is to make this regulatory requirement irrelevant because landlords and tenants are working together to willingly produce much better annual reports as part of a changing culture where tenants are an integral part of decision-making.

This report has been produced using grant from the TSA's Tenant Excellence Fund, but the resources are not sufficient to enable us to print copies of the full report to give to tenants. We have printed short summary versions which are available for tenants.

The full report is available on the websites of the CCH, NFTMO, TAROE and TPAS (see the end of this document for the web addresses) and on the TSA's website.

Some tenants will be able to access the report on the internet but many won't. We request that landlords make the full report available to those tenants who request a copy of it. If a tenant is unable to obtain a copy of the report through their landlord, please contact the TSA's Customer Service Team on 0845 230 7000, or email enquiries@tsa.gsx.gov.uk. They can provide copies in large print, Braille and audio cassettes on request. Other language versions may also be available.



Key points from our review

It has been important that landlords have been required to produce annual reports to tenants.

The production of annual reports to tenants has meant that landlords have had to think carefully with their tenants about the services they provide, how they engage with and empower their tenants, and about how they account to their tenants.

There are many positive points about some reports.

Some landlords have clearly devoted considerable resources to the development of reports and have worked well with their tenants to produce them. However the quality of reports varies considerably.

Many reports lean towards self-congratulation and PR, putting a positive spin on even bad news – rather than being honest and self-critical.

This *corporate* approach to reports is a cultural mindset that will not help tenants to hold their landlord to account. It needs to be tackled if tenants are to be an effective part of the new regulatory framework.

Based on our scoring system (explained later in the report), our overall assessment of the first year annual reports supplied to us is that on average they are just below adequate.

Housing association and ALMO reports tend to be slightly better than councils who directly manage homes. Our reviewers rated 67 reports above adequate, whilst 69 were below. Just under half of the reports (121) were considered to be adequate.



Too few reports really set out to really capture and excite the reader.

Some reports are well designed and tenant friendly - some reports are not! 54 reports were considered above adequate; 89 were considered below adequate.

Some of the best reports involved extensive consultation with tenants and tenant-led design, content, format and procurement of reports.


The role of tenants in the production of reports varied. Our reviewers considered that the ways that tenants had been involved in the development of reports were above adequate for only 58 reports, whilst nearly half (122) were considered below adequate.

The quality of service assessment varies, as does the use of performance measurement.

Our reviewers considered the assessment of services to be adequate for just over half of the reports, with only 60 considered to have excelled, 65 considered poor, and over half considered adequate.

In some cases, an over-reliance on satisfaction statistics and limited use of comparisons between landlords does not help tenants hold their landlord to account. Even where comparisons are used, some landlords are not choosing to compare themselves with the best.

Only 31 reports were considered to have used performance measurement well, whilst half of the reports (128) were considered to have used performance measurement poorly.



Reports indicate that standards of tenant empowerment have improved in the last few years.

It was commonplace that a menu of involvement was reported that includes a tenant body, tenant scrutiny, and a wide range of other ways to engage. The 49 reports that excelled in tenant empowerment demonstrated a wide tenant constituency with a clear role in governance and decision-making in the landlord. 94 reports were considered poor in this area.

Only a few landlords produced comprehensive sections on diversity.

Only 32 reports had above adequate sections on diversity, whilst others skirted over it or did not mention it at all. Over half of the reports (132) were considered to have below adequate reference to diversity. In particular, very few referred to the lesbian/gay/bisexual/transgender and religion/belief strands.

Similarly only some reports produced above adequate sections on value for money.

Only 39 reports were noted as above adequate in relation to value for money, whilst over half (130) were considered below adequate.

Only just over a tenth of housing association reports were considered to have excelled in their reporting of governance and viability.

Over half of the housing association reports were considered to have a below adequate section on governance and viability – with many considering that they did not have to discuss such issues with their tenants.



Just under three quarters of the reports scored poorly on the distinction between national standards and local offers.

This may have been due to the TSA's definition of local offers, and it may be that some landlords may have been addressing local issues in other ways. But it is difficult to understand from reports what landlords are doing locally, and many landlords identified basic landlord wide service issues they are required to discuss with their tenants under the Involvement & Empowerment Standard as local offers. If localism is about enabling local people and communities to take power over the lives, communities and neighbourhoods, very few housing associations or councils are addressing this through their local offers. The key issue is how landlords are engaging with tenants locally and adapting their services to local needs and aspirations.

Some (but not all) larger housing associations have particular problems with localism.

Some larger associations identified the whole of their stock as the basis for a "local offer". Many used global performance statistics over their entire stock making local accountability impossible. Some only compared themselves with other large associations, thereby limiting tenant expectations. Our reviewers were also concerned by global policies across several thousand homes, and the lack of local identity inherent to different subsidiaries of group structures using the same report.

However, it should be noted that there was not a significant statistical variation between the scores given by our reviewers to larger and smaller associations. This was because there were a small number of large associations who did score well in our scoring system (and we identify these associations later in the report), and this disproportionately raised average scores within the smaller number of larger associations in our sample. The approach of larger associations who excelled suggests that it is possible for large associations to properly engage with localism if they wish to.

How we did the review

The TSA gave the NTOs a random sample of 257 annual reports to review that gave a breadth of landlord type, size and geographical coverage. No conclusions can be drawn regarding reports that we were not given to review. Other reports may also have excellent qualities.

The reports given to us (shown at the end of this report) included:


Type of landlord	Numbers of report
Housing associations	175
managing under 5,000 homes	75
managing between 5,000 and 10,000 homes	54
managing between 10,000 and 15,000 homes	23
managing between 15,000 and 20,000 homes	7
managing over 20,000 homes	11
other	4
Councils	82
with retained management	50
with some or all management through ALMOs	32
with some management through TMOs	4

In addition, the homes of one housing association were all managed by TMOs and one other association referred to TMOs.

A team of 12 NTO reviewers reviewed the annual reports using a template made up of 15 questions shown below. As well as being asked to identify features of interest in relation to positive issues in each of the questions, reviewers were invited to give points from 1 to 5 against each of the 15 questions, where – in the opinion of the reviewer:

1	meant that the landlord had not addressed the issue
2	meant that the landlord had partially addressed the issue
3	meant that the landlord had satisfactorily addressed the issue
4	meant that the landlord had addressed the issue fairly well
5	meant that the landlord had addressed the issue very well

Our review was not a formal assessment of annual reports. It was intended to identify trends and to draw out things we considered had been done well. Various steps were taken to ensure a level of



consistency between reviews, but reviewers were asked to give their personal opinions on subjective issues, leading to some lack of consistency. Our view is that different perspectives in the review have enabled us to build a broader consensus of a tenant opinion that is not homogenous.

Our reviews were based on reports supplied to us by the TSA. We were not in a position to say whether information provided in reports was accurate or properly reflected the experience of the landlord's tenants. We were also not in a position to review the actual effectiveness of services.

We took steps to ensure that reviewers did not have any prior knowledge or opinions of landlords whose reports they were reviewing. Conflicts of interest considered included ensuring that individuals with a specific relationship with landlords (such as being a tenant or board member, or the individual or NTO having worked with the landlord), and ensuring that the two tenant control related NTOs did not review reports from organisations with a particular element of tenant control.

A draft version of the report was circulated to a reading group, whose members are set out at the end of this report. The reading group made many helpful comments which we have used to improve the report, and we give them our warm thanks for their time and assistance.

What we were looking for from the reports

The table on the next few pages sets out what we were looking for from annual reports in relation to each of the 15 questions asked.

In general, we were seeking to review reports from a tenant's perspective – considering what tenants would want from the report. But we were also balancing what a tenant who had not been previously involved might want with what we considered a tenant would need in order to hold their landlord to account.



Question		A 5 score would have been given here if a report ...
1	How good is the report?	... generally felt like it had been produced for tenants, where the landlord and tenants had worked together to consider the issues and outcomes behind the standards, and where comprehensive information had been presented in a tenant friendly fashion. We were negative about formulaic reports that felt like a PR exercise – self-congratulatory old style annual reports produced for the regulator scored low.
2	How well and how honestly do you feel that the landlord assessed their current performance against standards?	... included a clear and honest analysis against each of the regulatory standards (not including governance & viability) and identified potential areas of improvement. Given that very few of the standards are “pass or fail”, we preferred reports that did not simply state that a standard had been met – we wanted to see how it had been met and how the landlord was going to work with tenants to further improve performance.
3	How effectively has the landlord used performance measures to illustrate performance?	... enabled tenants to hold the landlord to account for their performance, providing good facts and figures about their performance – comparing those facts and figures with the best landlords – and explaining the facts and figures in a context that would enable tenants to expect the best of their landlord.
4	How well has the landlord shown how they will work with their tenants to meet the outcomes to the standards?	... showed how landlords were going to achieve the outcomes of the standards with their tenants (ie. the outcomes as set out in the regulatory framework). Did the landlord's approach to achieving standards set out how they might maintain, improve and enhance the quality of life for their current and future tenants and residents?



Question		A 5 score would have been given here if a report ...
5	(HAs only) How well have they referred to the Governance & Viability standard?	... explained governance and viability issues well and in a tenant's language. Several associations said that the TSA did not expect them to discuss G&V with their tenants and that earned them a 1 score! Although the question referred specifically to housing associations, we also scored a small number of ALMOs and councils who chose to discuss G&V issues with their tenants (even though they were not required to).
Cross cutting themes		
6	How much does the report get across the options available for tenants to get involved in the management of their homes?	... set out options for involvement that included methods for active tenants to be involved at the heart of the landlord's governance - rooted in and informed by comprehensive individual methods of engagement – and all of it feeding into and making a difference to the landlord's decision-making about its strategies, policies and procedures. A report that only identified a standard set of involvement options (eg. a tenant panel, service review groups, tenant inspection, surveying etc) tended to score an adequate 3.
7	How much does the report reflect issues of diversity?	... made issues of fairness, equality and diversity come alive for and relevant for tenants. This would have been setting out a clear commitment to diversity, exploring the diversity of the tenant constituency (in relation to the <i>protected characteristics</i> ¹ and other issues such as work and family commitments, learning difficulties, health issues, appearance) and steps taken to develop an effective diversity strategy.

¹ *Protected characteristics* as defined by the Equality Act 2010 - sex, race, disability, sexual orientation, religion or belief, age, marriage and civil partnership, gender reassignment, and pregnancy and maternity



Question		A 5 score would have been given here if a report ...
8	How well has the landlord shown that they will consider value for money issues in partnership with their tenants?	... included good information on value for money issues – that explained their importance and relevance to tenants - and set out clearly the opportunities for tenants to work in partnership with the landlord to develop the effectiveness and efficiency of services. Those landlords who only referred to limited issues (such as rent arrears or how the rent is spent) were scored low.
Relationship with tenants		
9	How much is the report accessible to tenants?	... was well presented, got across a range of comprehensive information on standards written in language understandable by tenants, with effective visual aids, and with a design that could capture the imaginations of tenants.
10	How relevant is the information provided to tenants?	... included information on standards and accountability in a way that chimed with tenants needs and expectations. The length of reports may have been an issue, although a longer but well presented report could have been effective. We also considered effective use of shorter and longer versions of reports.
11	How much does the report indicate tenants have been involved in its development?	... showed comprehensive and leading involvement of tenants in the development of the report, including both a group of tenants involved in the content, design and procurement, and opportunities for tenants more widely to shape the report's content.



Question		A 5 score would have been given here if a report ...
12	How clear is the landlord's definition of local?	... set out a multi-level definition of local that offered opportunities to engage and influence the service at the level right for them – ie. including local neighbourhoods, other local geographical areas, particular groups of people, and across the landlord as a whole. Landlords who had simply decided that local offers could only be provided across the whole landlord scored low.
13	How effective are the proposals for local action?	... demonstrated realistic plans to implement local offers offering a comprehensive means for all tenants to engage with and influence the service at the local level right for them.
14	How much does the report show how local offers have been consulted on with tenants?	... described multi-level consultation activity on local offers, including surveys, face to face activity, a range of meetings and discussions over a period of time. A key question here was whether the landlord's consultation methods had enabled all tenants to express their views and not just those normally actively involved.
15	How much do you get a clear sense of the relationship between national standards and local offers?	... recognised a clear balance between national standards and local offers – that showed that landlords understood that under national standards, they are already required to enable tenants to influence their service policies and that local offers are about ensuring that all tenants are able to participate in ways of shaping the service that is right for them and that services can be adapted appropriately.



The results of our review

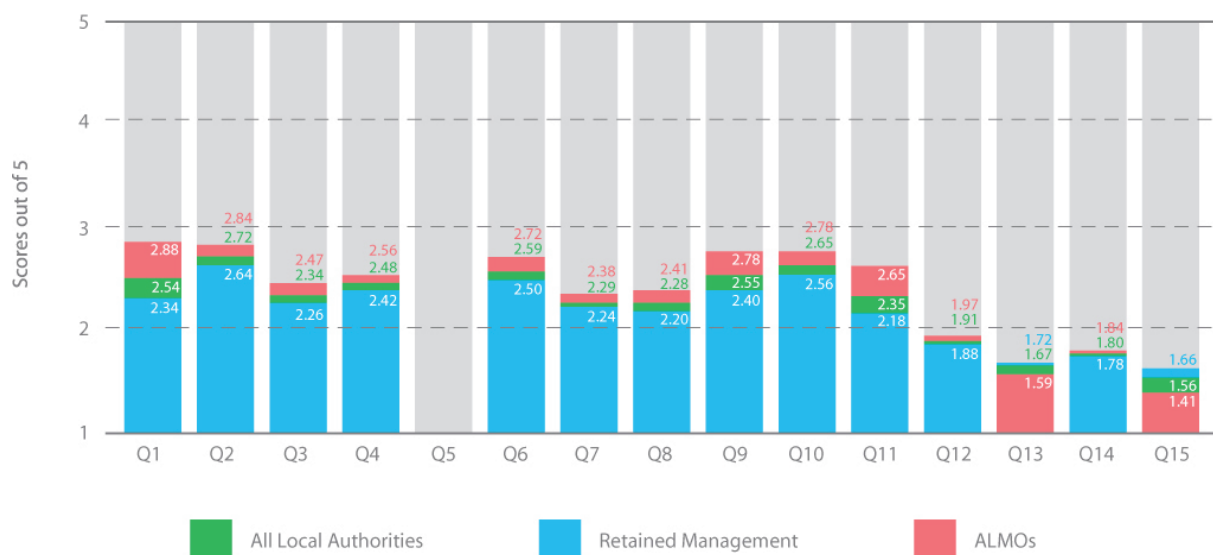
Average scores for each question awarded for all 257 reports (and sub-divided into housing associations and councils) were as follows (Q5 only scored for 175 housing associations):

Average scores for all landlords



For councils, the average scores were as follows:

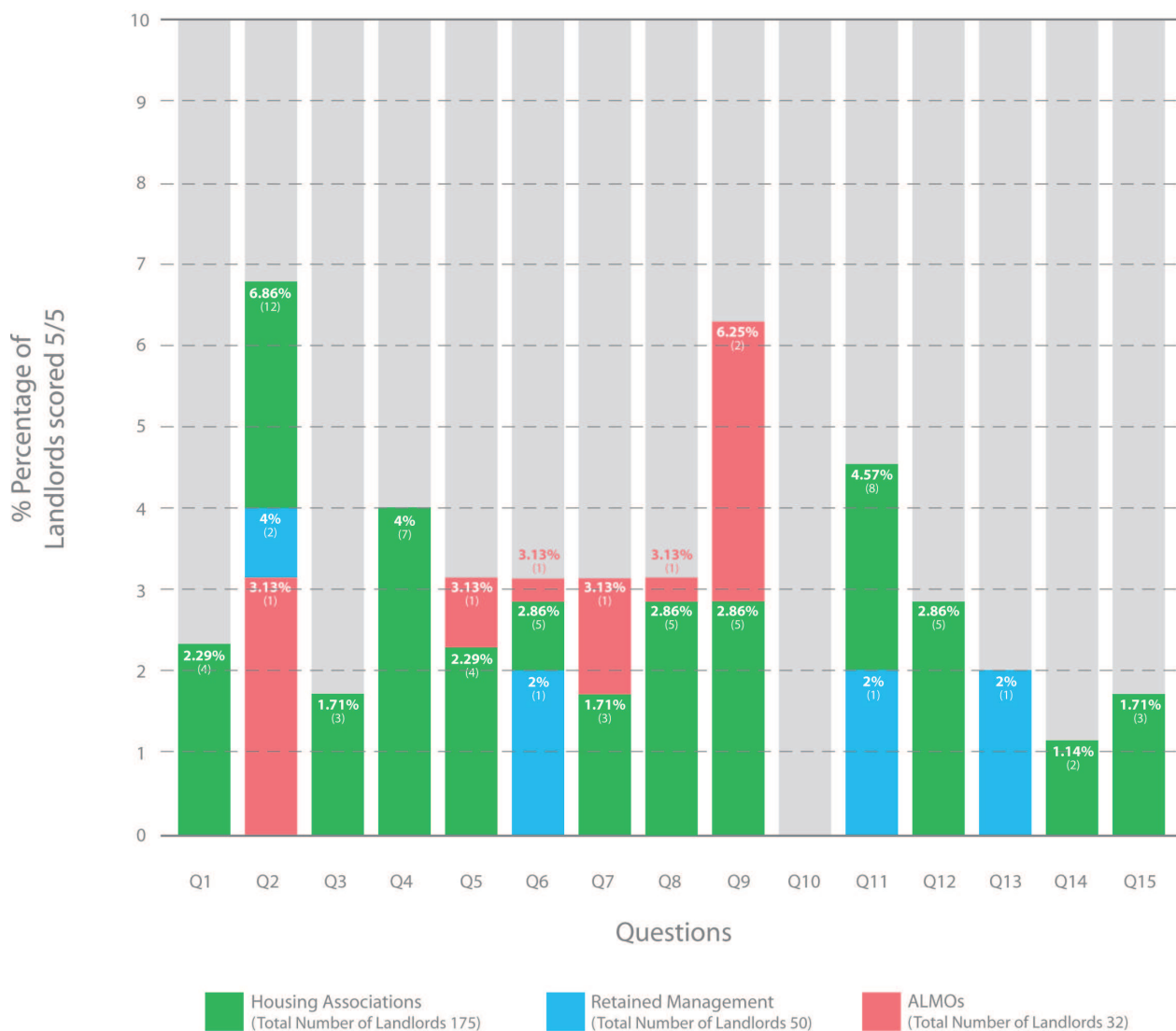
Average scores for council landlords



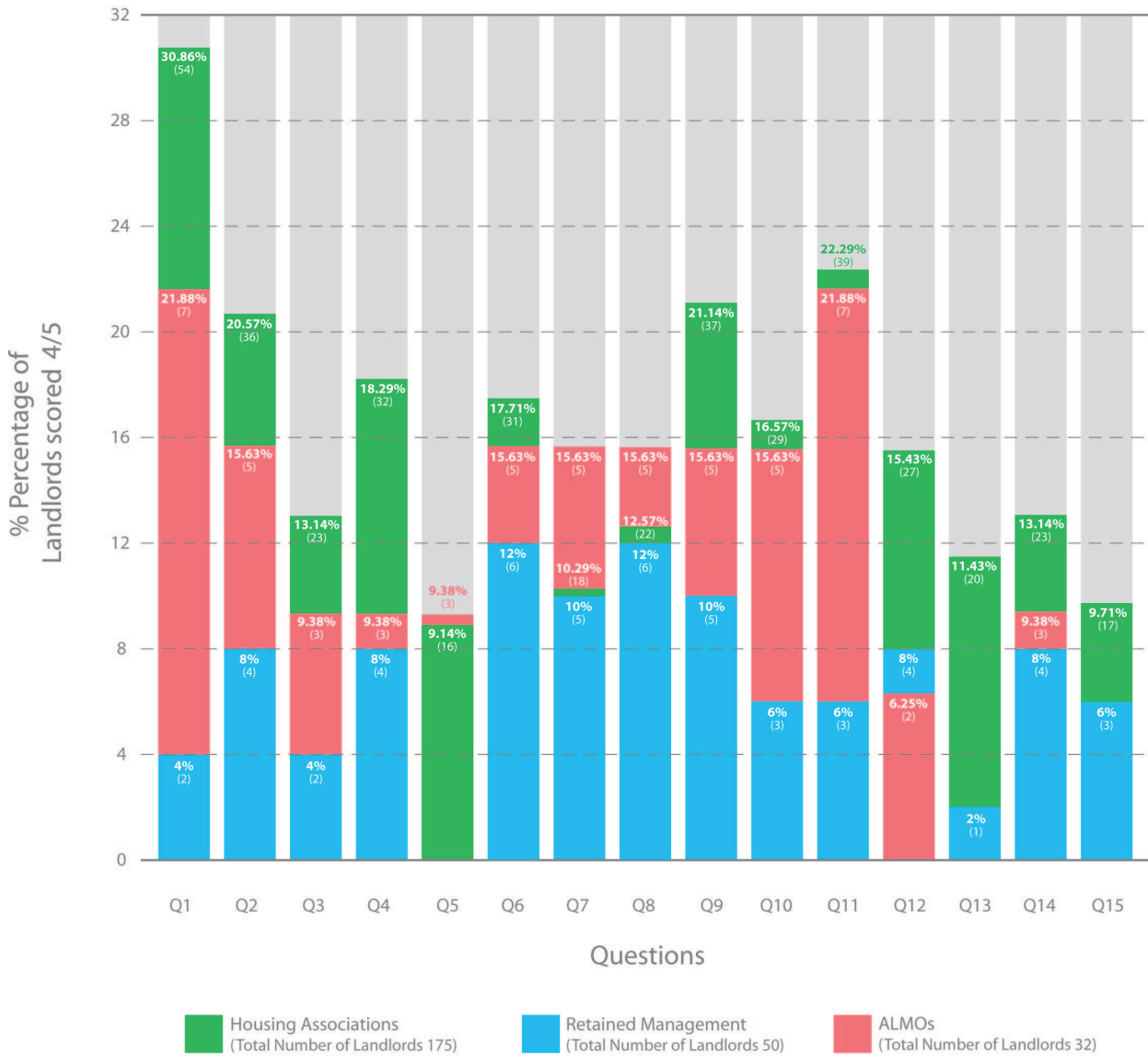
These scores show that our reviewers considered the quality of reports to be on average just below adequate, with housing associations performing slightly better than councils on all questions, and ALMOs performing better than other councils. Definitions, plans, consultation and understanding of local offers were all significantly below adequate.

Reviewers issued above adequate 4 and 5 scores and 1 scores (ie. where reviewers considered that the landlord had barely addressed the issue at all) as follows:

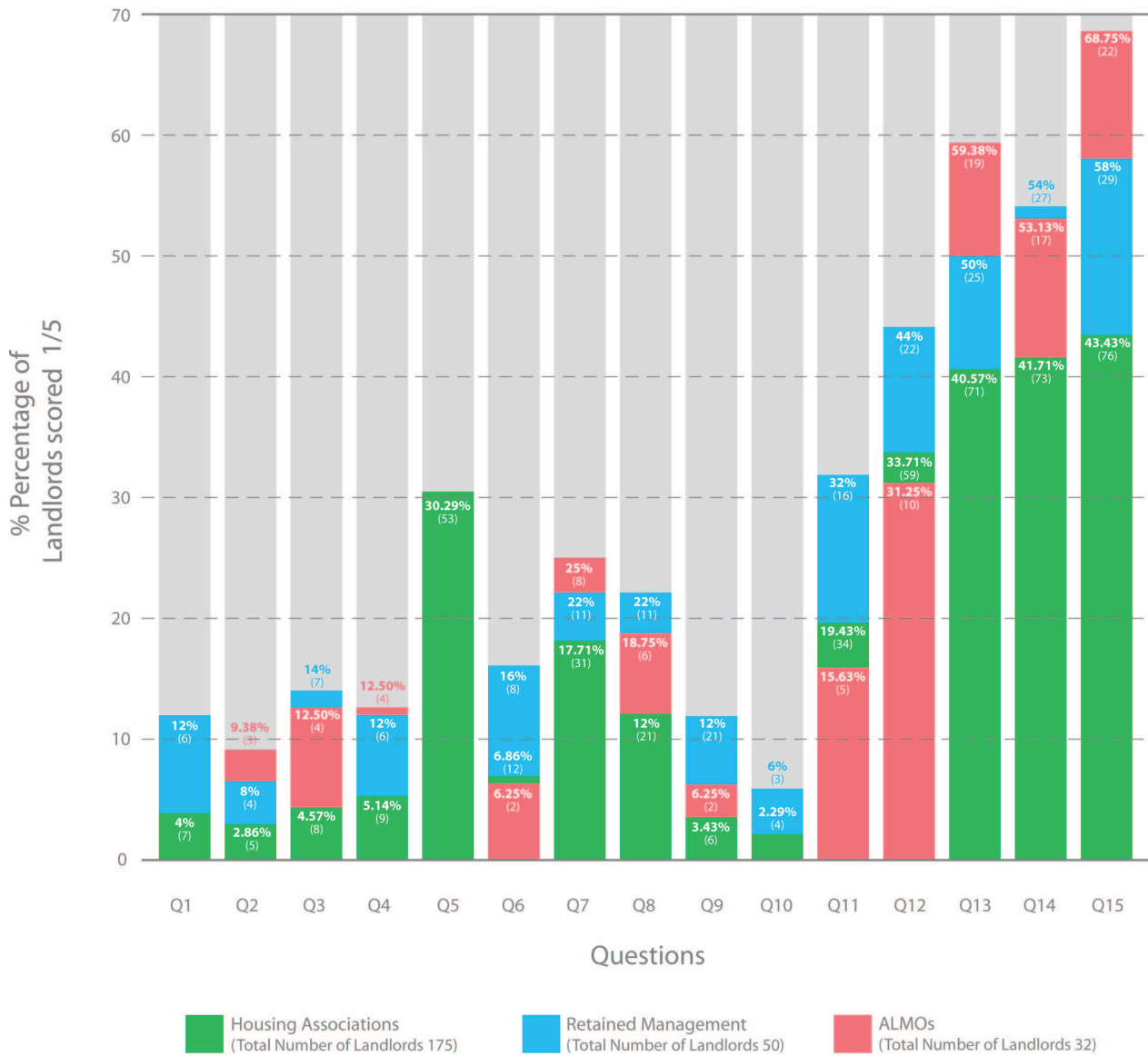
Scores of Five



Scores of Four



Scores of One



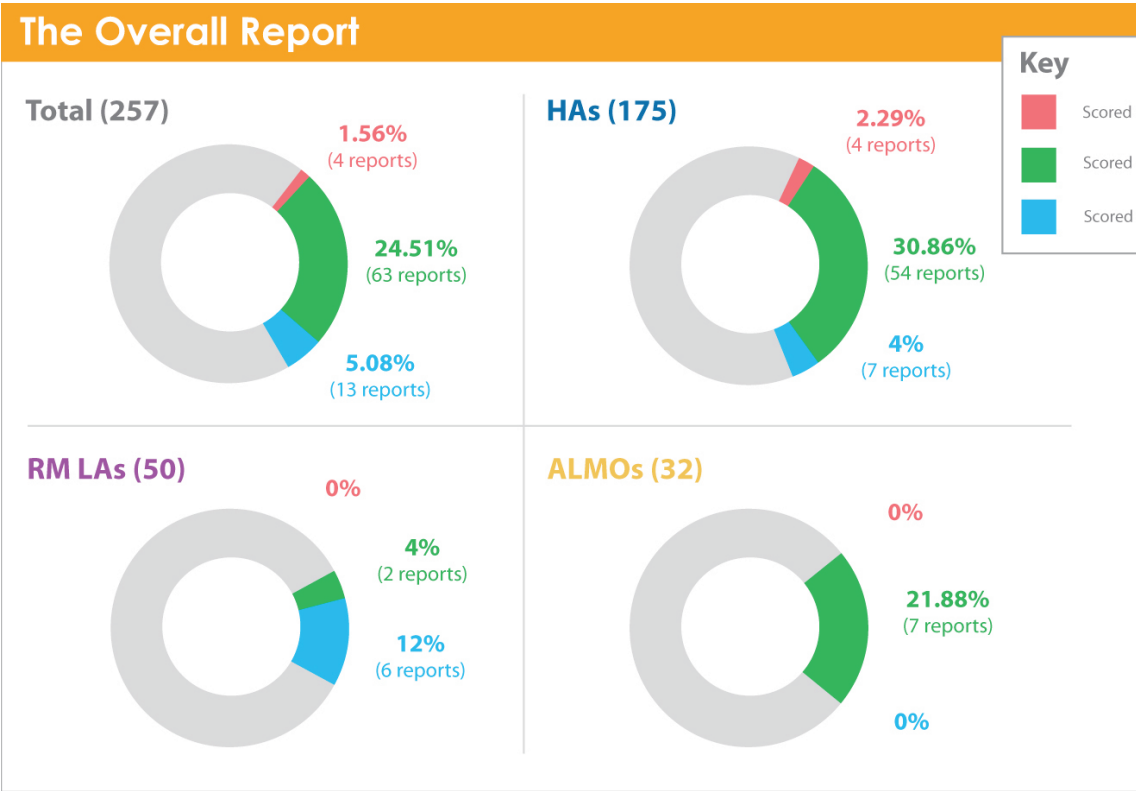


What we liked

Throughout this section we have colour coded housing associations, councils and ALMOs as follows:

- Housing Associations
- Councils
- ALMOs

The Overall Report



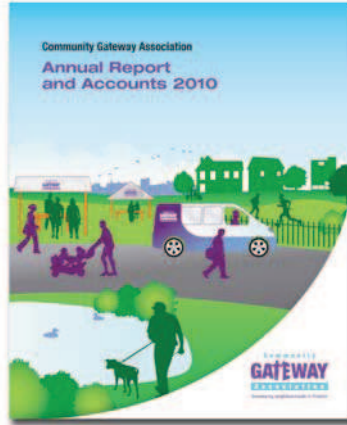
Our review produced only 4 reports which we felt warranted an overall 5 score. They were the reports produced by:

COMMUNITY GATEWAY ASSOCIATION LIVERPOOL HOUSING TRUST	EASTEND HOMES SOHA HOUSING
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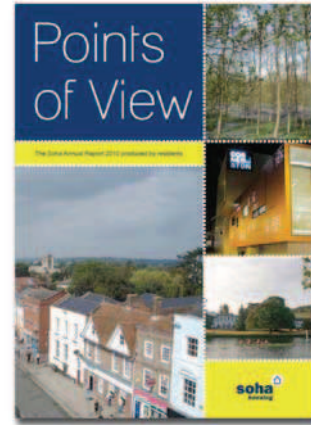
These and most of the other reports referred to in our review can be found on the landlord's websites or by contacting the landlord. If you cannot find them please get in touch with us.



Eastend Homes



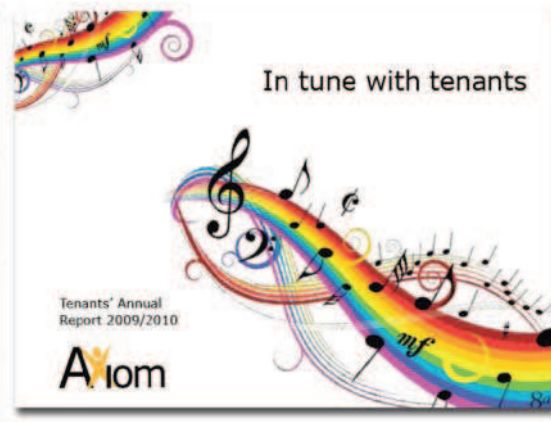
Community Gateway Association



Soha Housing

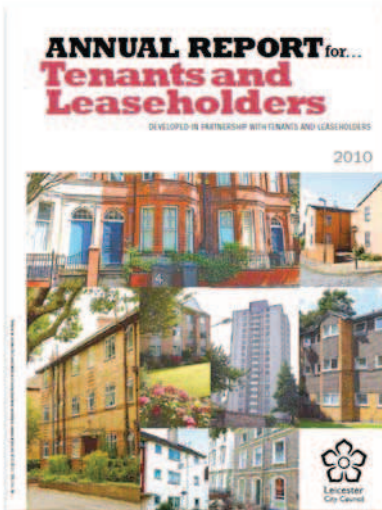


Liverpool Housing Trust



Axiom

Axiom would have also scored 5 had its report not felt too long. Reports produced by **Central Bedfordshire Council**, **City of Lincoln**, and **Leicester City Council** were the highest rated council reports, and by **Gloucester City Homes**, **Cheltenham Borough Homes**, **Berneslai Homes**, **Salix Homes**, **Hackney Council** and **Sandwell Council** the highest rated reports involving ALMOs.



Leicester City Council



Salix Homes



Hackney Council

Harvest Housing Group, Guinness Northern Counties, Wakefield & District Housing, Peabody, and Metropolitan Housing Trust were all housing associations managing more than 15,000 homes which scored highly on our rating systems.



Harvest Housing Group



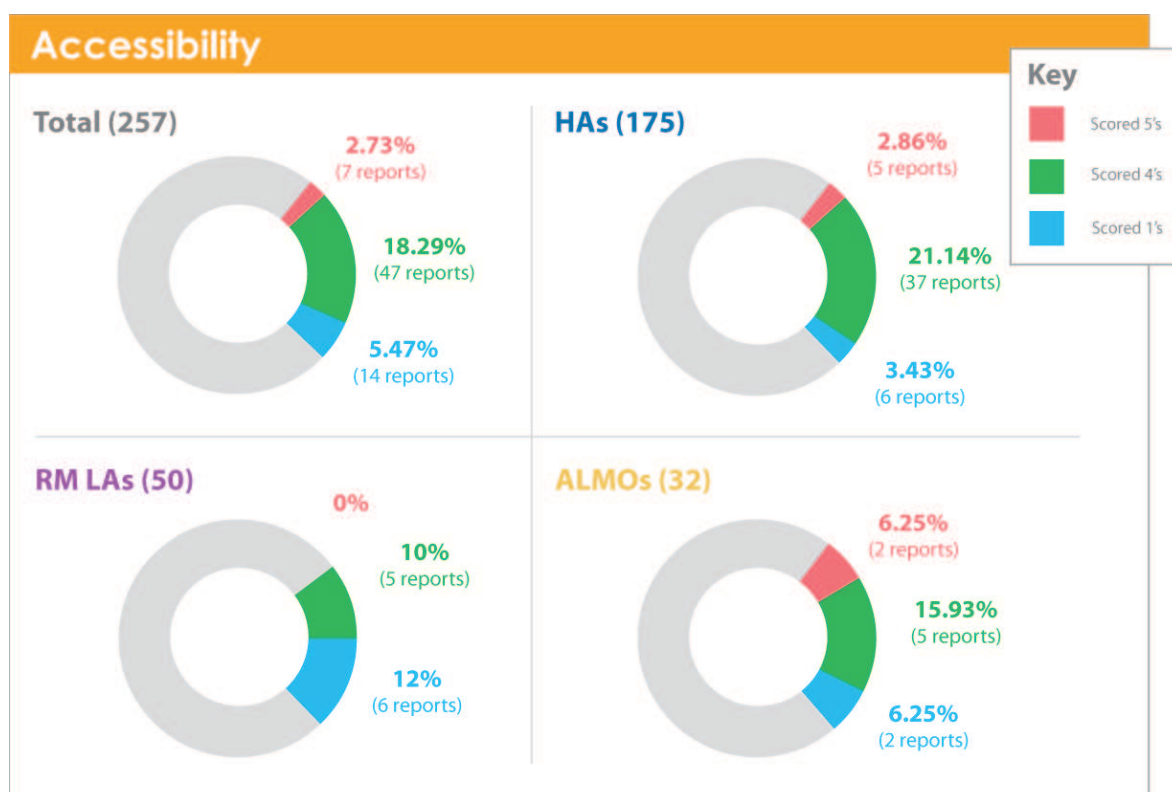
Peabody



Guinness

The reasons why these reports were scored highly by our reviewers are set out in the following pages.

Making the report accessible



Accessibility will always be important in annual reports in order to get across quite dry information in a way that would welcome tenants and encourage them to read the content. It was a shame that some reports with good content were let down by poor presentation. Too many landlords considered that the best way to get complex information across was through “text splurge”.

Nonetheless a lot of reports were reasonably well designed – and we highlight some below that our reviewers found attractive, well laid out making it easy to understand the information provided and presented in a tenant friendly fashion. We could have chosen more, but the box below shows our top five well designed association and council reports.

HOUSING ASSOCIATIONS	COUNCILS/ALMOs
<p>Chelmer Housing Partnership East Midlands Housing Group North Devon Homes Regenda Group Soha Housing</p>	<p>Leicester City Council Norwich City Council Wycombe District Council Salix Homes Sandwell Borough Council</p>

We draw particular attention to the following design features:

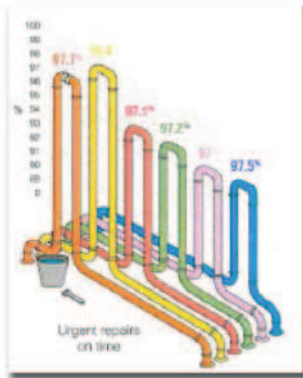
- many reports used graphics to show performance, particularly including many variations of traffic lights, smiley faces, speedometers and targets. The graphics below stood out:



Salix Homes flowers



Paragon Community Housing people



Johnnie Johnson pipes

Meets the requirements of the TSA Standard but needs slight improvement

Doesn't meet all the requirements of the TSA Standard but has plans in place to improve

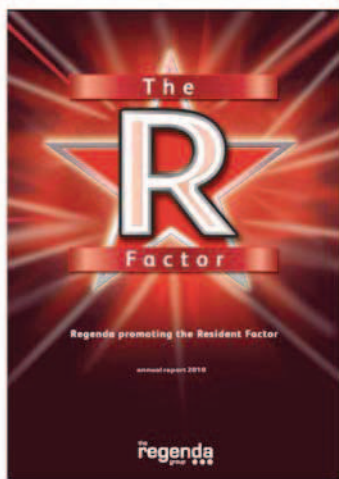
Doesn't meet any of the required TSA Standards

Boston Mayflower

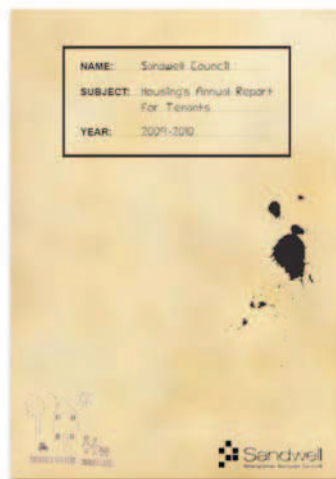


Wycombe DC cartoons

- particular use of photographs – **Soha Housing** (using photographs taken by residents) and **Accord Housing Group** (and its Ashram and Moseley & District subsidiaries - use of the “People Project” – using photographs from an arts based project where tenants and staff had been enabled to photograph themselves)
- we had mixed feelings about the use of calendars and puzzles – some tenants will like them – others won't
- some landlords used imaginative design concepts – **Sandwell Council** (a school report – with tenants awarding grades – eg. B+); **Regenda Group** (the “R” Factor – with R standing for Resident – and presenting the whole report in X Factor style; **North Devon Homes** (a punchy newspaper style)



Regenda Group

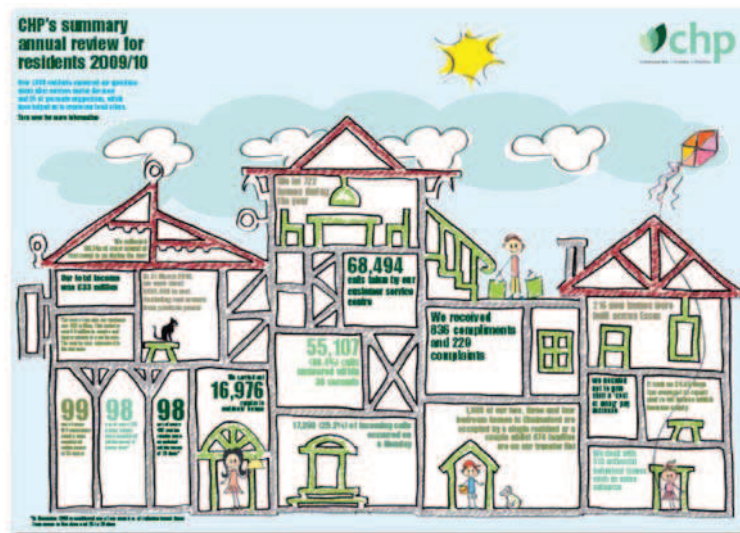


Sandwell Council



North Devon Homes

- we liked the simplicity and design of the **Chelmer Housing Partnership** two (large) page spread – where the first showed a house full of facts and figures and the second an assessment against standards.



Other presentational issues included:

- we were not in a position to review how or if reports had been circulated to tenants, or if they had not been circulated to tenants, how tenants would have known that an annual report had been produced for them. Some landlords had produced summary versions of reports that referred to a more detailed version available either on request or on the landlord's website. We were concerned that it was quite difficult to find the reports on some landlord's websites.

We would expect landlords to at least circulate a summary version of the report to all tenants.


- many reports were introduced by a mixture of tenants, senior staff and either by chairs of boards or appropriate cabinet members. It was positive to see reports for tenants presented by tenants, although the success of this approach would be dependent on the position held by the tenants in question in their wider tenant constituencies. We were also pleased to see senior staff and chairs/cabinet members introducing reports demonstrating organisational support – we were very concerned by the one report

that was developed and introduced by a tenant participation officer without any apparent support from other members of staff or tenants.

- several ALMO reports were clearly a product of partnership with the council landlord (eg. **Sandwell Council**'s report, the majority of whose homes are managed by **Sandwell Homes** and **Northumberland County Council**'s report, whose homes are managed by **Homes for Northumberland**). Given that annual reports are the responsibility of the Council landlord, we were pleased that some Councils gave clear endorsement to reports produced by their ALMOs.
- the length of reports could be an issue. Some well produced longer reports were better than some poorly produced shorter reports, and there is no optimal length of a report, but reports that were longer than 24 pages could be too long.
- many landlords used two reports – a shorter summary version for all tenants and a more detailed version for tenants who wanted more detail. We would particularly highlight **Norwich City Council** and **Selwood Housing** (who each produced two reports that were both attractively designed); and **Optima Community Association** (where the first report summarised key issues for tenants and the second considered standards compliance and performance data)



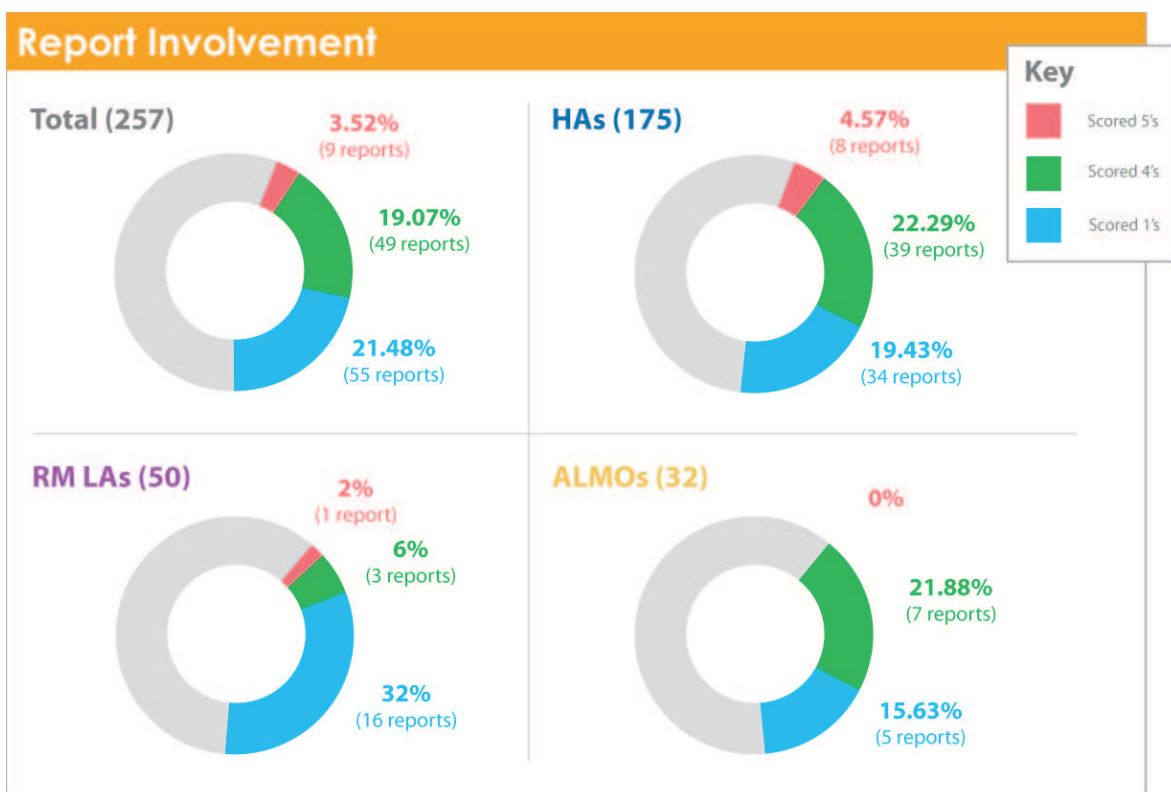
Optima Community Housing reports

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- it is important that tenants know that it is a regulatory expectation that landlords produce annual reports for tenants, but we were concerned that some providers seemed to be indicating that they were only producing annual reports because the Tenant Services Authority had told them to.

We welcomed that HACKNEY COUNCIL made a clear statement that their report was for tenants and not for the Tenant Services Authority or the Council.

- the provision of glossaries and jargon busters in some reports was welcome
- many reports set out clear identification of how tenants could get copies of full reports, translations and in alternative formats. We were concerned that some landlords may not have “colour tested” their reports to check that tenants with visual impairments can read them.
- whilst we were also worried about tokenism, we were concerned that there had been little consideration in some reports about reflecting the diversity of the tenant constituency in the photographs used
- some reports included action plans (and others referred to them) that identified how action points referred to in the report were going to be implemented, and how tenants were going to be able to monitor their implementation
- it was positive that some reports included additional information of relevance to tenants and residents – such as sections (or in some cases separate reports) for homeowners, leaseholders, sheltered housing tenants and on development.

Tenant involvement in the development of reports



The new regulatory framework depends on a partnership approach to the assessment of a landlord's compliance with standards between the landlord and tenants. This means that the ways that tenants are involved in the development of reports is vital.

A number of landlords stamped their reports as "tenant approved" as a result of tenants being in some way involved in validating the report's assessment of services. Some reports had been assembled on the basis of, sometimes extensive, consultation with tenants.

A small number of reports went further than this in that their design, format and content were generally tenant-led – or at least produced by a team of tenants working in partnership with members of staff. In each of these reports, there was a clear sense that tenants were "in control" of the content of the report.

The following were examples of "tenant-led" partnership reports:

- **Axiom** – report produced by tenant Annual Report "Conductors" working with the Communications Manager

- **Boston Mayflower** – report produced by a Editorial & Scrutiny Group consisting of 9 tenants – basing the report on findings from a “Lets Talk” consultation programme
- **Community Gateway Association** – report produced by a tenant-led communications focus group managing design, layout and content; content further discussed with the Gateway Tenant Committee, CGA members (tenants and residents) and residents groups
- **Contour Homes** – report produced by a team of 5 residents supported by the Performance Manager and the Equality, Diversity & Engagement Manager
- **Cheltenham Borough Homes** – report produced by a team of 7 tenants, 1 board member and 4 involvement staff



Cheltenham Borough Homes team

- **Joseph Rowntree Housing Trust** – report produced by a group of tenants – based on information from resident panels
- **Phoenix Community Housing** – report produced by the Communications Committee – a sub-committee of the Phoenix Residents Group
- **Soha Housing** – report produced by a team of tenants built from those who had indicated they wanted to be involved from previous year’s report. Individual residents carried out reviews of each service area.
- **Poplar HARCA** – report produced by a group of tenants and staff working together although “self-management (by tenants) was an option”. Content based on extensive consultation workshops and events (1,000 tenants consulted).



Poplar Harca

- **Rosebery Housing Association** – report produced by Rosebery Reviewers – 7 residents working with their Community Involvement Co-ordinator
- **Rooftop Housing** – where a majority of tenants formed the Editorial Board



Rosebery



Rooftop Housing Group

Tenants were also heavily involved in the development of the following reports:

- **Bernicia/Cheviot** – report drafted with tenants panel
- **Brighton & Hove** – report drafted with the Homing In Tenant Editorial Board – a Housing Management Consultative Committee checked its draft content – and the information used was based on extensive consultation

- **Connect** – the Connect Resident Federation was invited to act as a “critical friend” during the report writing process and wider consultation had taken place with tenants
- **Family Housing** – tenants were involved in design and procurement and service groups/“One Voice” checked content
- **Gloucester City Homes** – a Tenant Publications Group and the Customer Forum were involved in report development
- **Hyndburn Homes** – the Tenant Participation Committee established a triple A assessment system – ie. whether services are Appropriate, Accessible and Affordable
- **Irwell Valley** – a Resident Scrutiny Panel were involved in checking content, and tenants were involved in design and format. There had been previous consultation and survey work.
- **ISOS** – a working group of tenants were involved in report development and a survey of tenants had been carried out
- **North Tyneside Housing** – an Annual Report Group and Overview Panel based on active tenants involved in service groups were involved in report production. A feature of the report was that different tenants interviewed staff in relation to each service area.

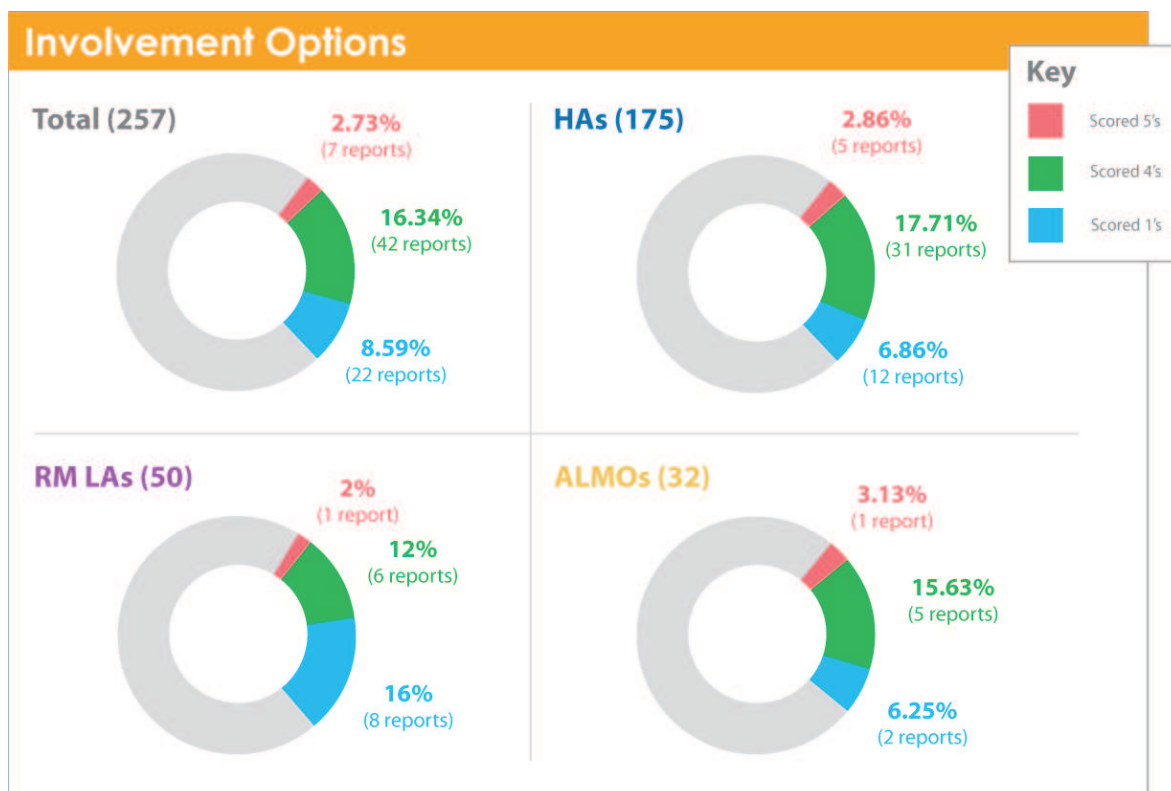


North Tyneside Housing

- **NS Housing** – a similar approach taken where tenants asked questions to the Chief Executive. For another landlord, this approach did not work because the questions asked were so clearly not asked by tenants that the overall effect was meaningless.

- **Sandwell Council** – 4 tenants were involved in design, content and format of the report
- **Worcester Community Housing** had customer champions and **Rooftop Housing** had members of their Resident Action Team championing and reviewing each standard area

Options for involvement



The new regulatory approach is also dependent on a comprehensive approach to enabling tenants to be involved in the management of their homes. Producing statistics, performance measurements and benchmarking can all be useful tools that can assist landlords and tenants assess levels of performance, but compliance with regulatory standards is about seeking to achieve outcomes in each of the standards areas, and the definition of desired outcomes and how well they have been achieved can only be determined between the landlord and its tenants.

Many reports suggest that landlords now understand the need to involve tenants. The norm reported on in many reports included landlord wide and/or local tenant bodies and tenant scrutiny panels



(existing or intended), alongside an array of methods to interrogate services, to enable tenants to participate in discussions on aspects of

the service they are interested in, and to consult, survey and gather tenant viewpoints on aspects of the service. Reports that excelled in this area demonstrated how tenants were making a difference and changing policies and strategies at the heart of the landlord's governance and decision-making.

There were a number of reports which our reviewers considered as above satisfactory in relation to tenant empowerment, but we identify the following as illustrative of different approaches:

<p>HOUSING ASSOCIATIONS</p> <p>Community Gateway Association Metropolitan Housing Trust Parkway Green Housing Trust Poplar HARCA WATMOS Community Homes</p>	<p>COUNCILS/ALMOs</p> <p>Central Bedfordshire Council Epping Forest District Council Norwich City Council Salix Homes Tristar Homes</p>
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The following are particular points of note:

- some landlords described tenant empowerment arrangements that linked tenants into their governance and strategic framework - **Hexagon** (including a table identifying involvement methods as either scrutiny, involvement in decision-making, or influencing decision-making, including through housing co-ops)

The table below shows the activities that enable residents to be involved with these opportunities:

Activity	Scrutiny	Involvement in decision-making	Influencing decision-making
Performance Review Group	✓		✓
Tenant board member	✓	✓	
Surveys			✓
Local offer & annual report group	✓		✓
Residents Forum	✓	✓	
Repairs satisfaction surveys			✓
Estate inspections			✓
Estates Grading Panel	✓		✓
Systems review project team	✓	✓	✓
Focus groups			✓
Mystery shopping	✓		✓
Contractor selection panel		✓	
Area meetings			✓
Tenant & resident associations			✓
Residents' day			✓
Residents' Design Group		✓	
Housing co-ops			✓
Complaints and suggestions			✓

Hexagon Housing Association

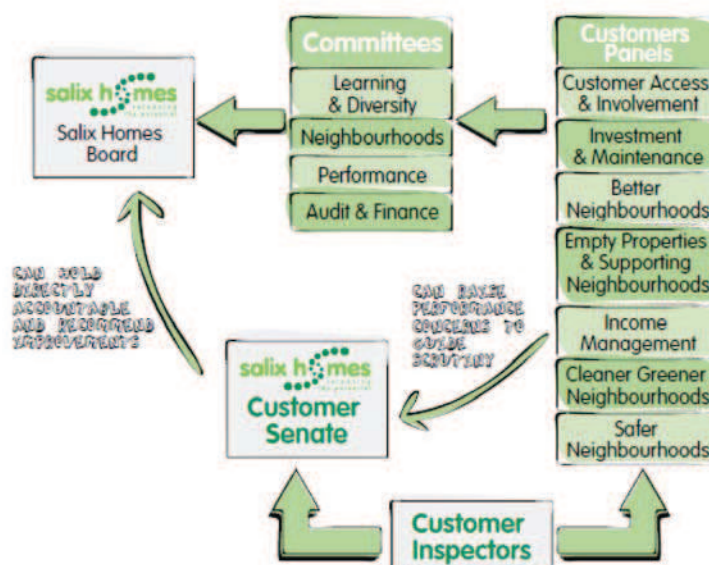
Metropolitan Housing Trust (their National Residents Group (NRG) demonstrates ways for tenants to strategically influence a national landlord)

National Residents Group

The National Residents Group (NRG) is an umbrella group of 12 residents drawn from MHP's member organisations. We are the lead partner on involvement activities in MHP, and help make decisions on key strategic issues.

Metropolitan Housing Trust

Peabody (recognising the impact of empowerment on “governance, services, and thriving communities”); **Poplar HARCA** (Estate Boards, leading to a joint Estate Panel, focus boards and the main board – both with a resident majority linking to strategic governance); **Salix Homes** (a diagram showing tenant role in governance through their “customer senate”, a scrutiny panel and customer panels for each service area)



Salix Homes

- some landlords demonstrated a good strategic approach to tenant involvement – **Rosebery Housing Association** (tenant reviewers impact assessing tenant involvement); **Oxford Citizen/Westlea** (tenant business plan); **Boston Mayflower** (their detailed report contains a strategic approach to involvement); **Freebridge Community Housing** (their Tenant Academy and Board Development Agency)



- **Central Bedfordshire Council** referred to 1,489 “friends” (those who had filled in surveys or attended meetings) and 67 “ambassadors” (more actively involved tenants – such as their Way Forward Panel and other residents groups)

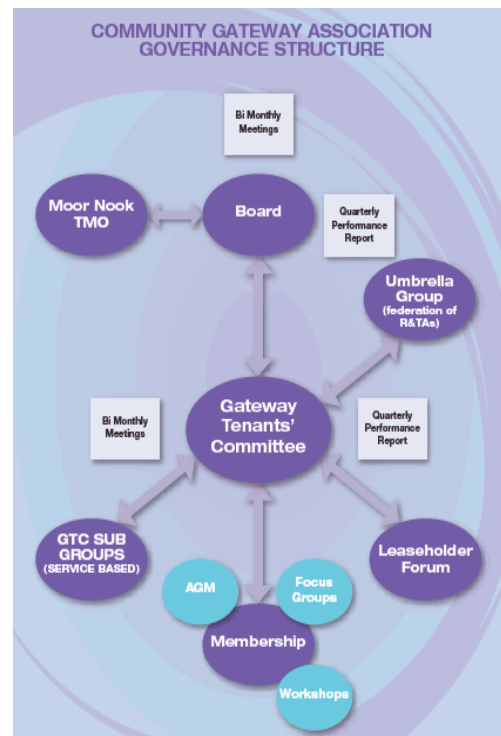
Average number of tenants involved with the Housing Service April 2009 to March 2010		
	%	actual number
Friends	24	1,489
Ambassadors	1.1	67

- some landlords referred to diversity work in relation to tenant empowerment - **Hackney Council** (an African and Caribbean Consultative Forum, a Turkish Forum, a Street Property Forum, an Asian Women’s Focus Group, a Disability Forum, Youth Committees); **Sadeh Lok Housing** (a residents panel reviewing the diversity of involved residents); **Endeavour Housing Association** (4uGroup - specialist group for people with disabilities); **Soha Housing** (youth involvement); **Community Gateway Association** (a Polish Community Group)
- some landlords referred to already existing local offer type work - **Parkway Green Housing Trust** (Neighbourhood Performance Panels); **Midland Heart** (local customer panels feeding into a customer & communities committee which feeds into the board)
- some landlords referred to methods of presenting tenant empowerment - **Endeavour Housing Association** (a menu of involvement that included starters, main course and dessert); **Epping Forest District Council** and **Tristar Homes** (map/structure chart for tenant involvement); **Parkway Green Housing Trust** (4 levels of involvement pyramid)
- **Leicester City Council** included an analysis of voluntary hours contributed and the equivalent monetary value of voluntary commitment

	2008 / 2009	2009 / 2010
Number of tenants and leaseholders involved	10,867	10,888
Volunteer hours contributed	9,042	12,962
Financial value of volunteer hours. Based on the number of hours contributed at the minimum wage	£47,047.41	£73,520.46

- the tenant empowerment approach at **WATMOS Community Homes**, where tenant involvement in governance both through WATMOS and the local TMOs was matched by less formal involvement through community activities and other means had led to impressive satisfaction ratings in all areas

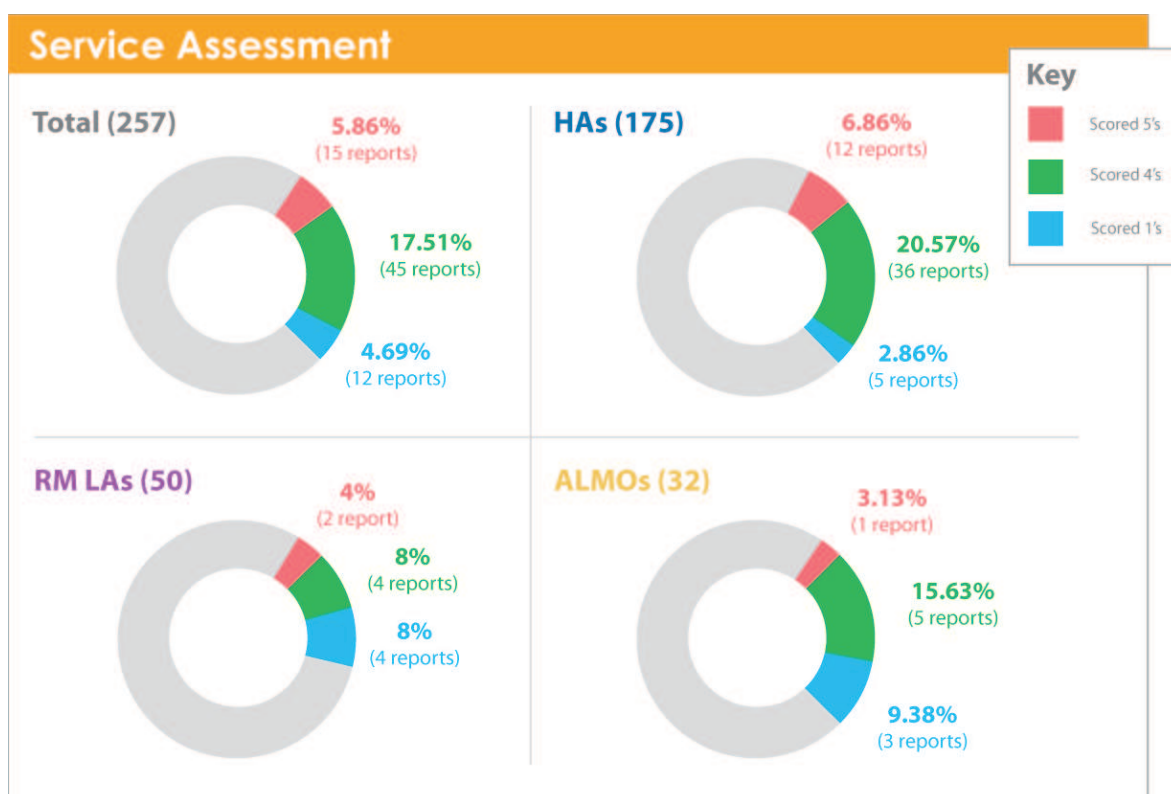
- the Community Gateways particularly did well in this area – **Community Gateway Association** described their gateway structure well (tenant membership, Gateway Tenants Committee, Tenants Umbrella Group all influencing a range of services and policies, their options studies programme, and a range of other methods to engage) – **Phoenix Community Housing** described stepped methods for tenants to get involved in decision-making (with high levels of influence and responsibility on higher steps), shareholding membership and 12 local area panels - **Watford Community Housing Trust** and **Greenfields Community Housing** explained their tenant membership and empowerment opportunities well



- Haig Homes** – a small but national landlord for ex service persons had shown some interesting promise regarding tenant involvement

Some landlords benchmarked low satisfaction ratings regarding taking the views of tenants into account with other landlords with similarly low ratings. One landlord presented a 64% rating as positive referring to a rating produced by the National Housing Federation of 63% as being the average, whilst **Soha Housing** – who, with a wide array of empowerment opportunities, and with a culture open to new ideas, stated that their 66% satisfaction rating indicated that there was more work to be done.

Assessment of service related standards



In the assessment of standards, we were keen to see landlords being comprehensive and honest about performance – recognising that compliance with a standard is rarely “pass or fail” – and that there are always ways to improve services. Too many assessments felt corporate and aimed at convincing the regulator about compliance issues. Green traffic lights or similar were regularly used to indicate that everything in the garden is rosy, implying that services can never be improved on (we liked that **Boston Mayflower** had a rarely used double green for full compliance with standards, and that **North Tyneside Council** used a similarly rarely used additional thumbs up sign against their green smiley face). Unless landlords identify shortcomings to their tenants, it is difficult to see how services will improve.

That many landlords then went on to explain how they were going to improve was nonetheless welcome. A key part of enabling tenants to regulate with landlords will be landlords understanding the need to change their self-congratulatory cultural mindset.



We liked that **Brighton & Hove City Council** started with the following tenant quote:

“There will always be shortcomings and failings, but I am impressed by the determination to improve as shown in the draft annual report”

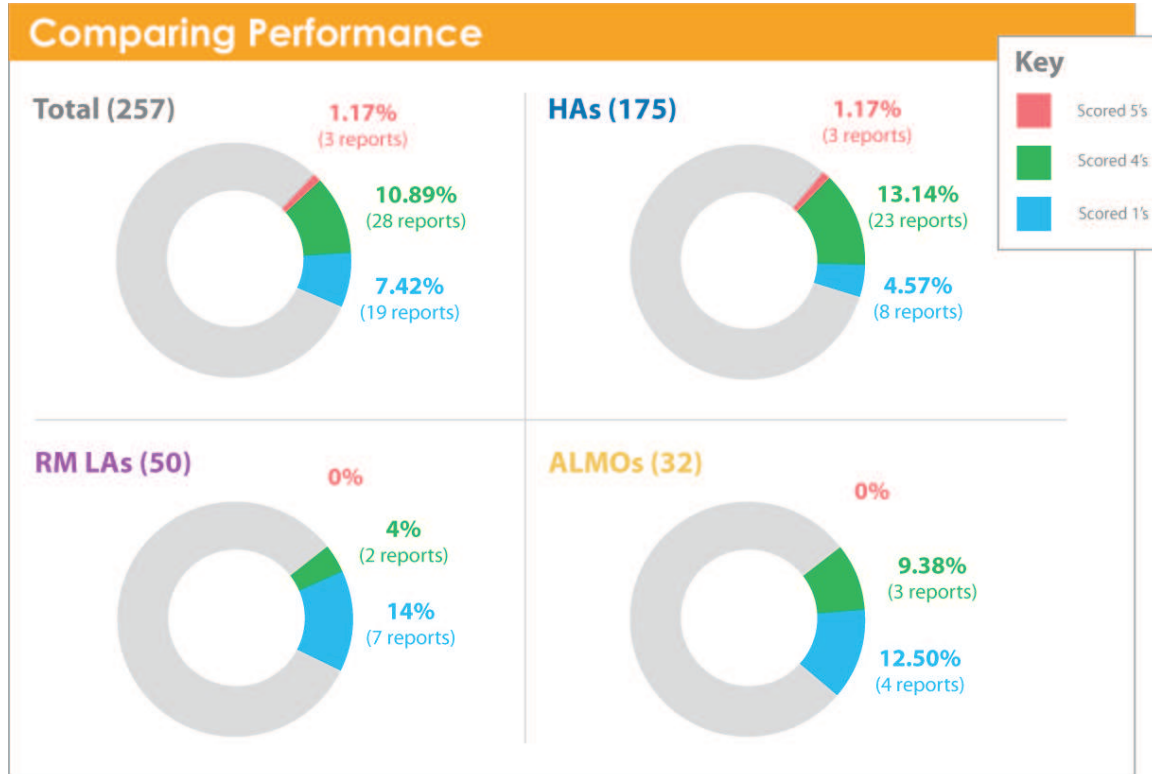
They also went on to not pull any punches in their inclusion of a number of (in some cases quite strong) quotes from tenants about levels of service. Similarly **First Wessex** included quotes from tenants setting out what they wanted to see improve.

There were a number of reports which our reviewers considered as above satisfactory in relation to service assessment, but we identify the following as illustrative of different approaches, which we felt were comprehensive and honest:

HOUSING ASSOCIATIONS	COUNCILS/ALMOs
Axiom	Brighton & Hove City Council
First Wessex	Epping Forest District Council
Guinness Northern Counties	Berneslei Homes
Poplar HARCA	Hackney Council
Sadeh Lok Housing	Salix Homes

We were also keen to see landlords showing clearly how their services compared with the best landlords so that tenants might have some context to judge the effectiveness of their landlord. There were not many reports that our reviewers considered had done this effectively.

Comparing Performance



Many landlords did not compare their services at all, and several compared their services with landlords not performing particularly well – making comparisons difficult for tenants (eg. many landlords only compared themselves with other local landlords; one council compared their performance with one other poorly performing council; and large associations generally only compared themselves with each other – particularly enabling one large association to mask some poor performance in relation to anti-social behaviour). We would urge tenants to insist that their landlords seek out and compare themselves with the best performers.

The following are illustrations of examples of better use of performance measurement comparisons:

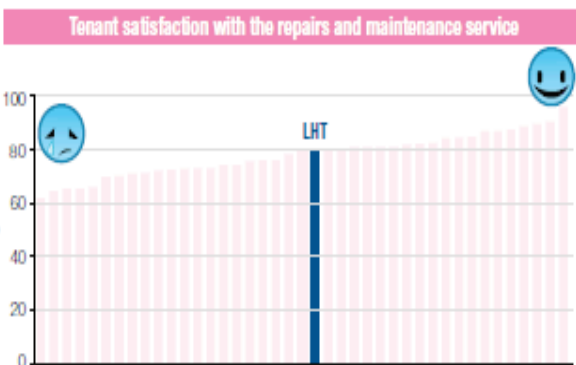


How are we doing? April 2008 - March 2010			
Our standard	Our target	Our result	How do we compare to others?
Satisfaction with our responsive repairs service	85%	89%	Better ☺
Satisfaction with our planned maintenance service	85%	87%	No data available
Satisfaction with our aids and adaptations service	85%	94%	No data available
Percentage of emergency repairs done within target time	99%	91%	Worse ☹
Percentage of repairs fixed on first visit	75%	67%	Worse ☹
Percentage of homes with an up-to-date gas certificate	100%	99%	Same 🗡
Average energy efficiency rating of our properties	No target	70%	Better ☑

A2 Dominion comparison table

Hackney Homes' targets	Rank in London	Top performer
Percentage of repairs appointments we have kept	11 out of 13 (96.16%)	Hillingdon Homes (99.20%)
Percentage of repairs completed within agreed timescales	13 out of 18 (93.77%)	Hillingdon Homes (99.20%)
Proportion of dwellings not meeting Decent Homes standards	10 out of 18 (34.80%)	Hounslow Homes (0%)

Hackney Council comparison table



Liverpool housing trust graph

Tenant satisfaction with repairs and maintenance – as at 31 March 2009 (in percent)*	
Vale Housing Association	85.0
Cottsway Housing Association	85.0
Oxford Citizens' Housing Association	80.4
Soha Housing	78.4 ☹
Charter Community Housing	76.0
Guinness Midsummer	75.0
L&Q Housing Trust	74.5
Catalyst Communities Housing Association	67.2
A2 Dominion North	66.9
Home Group	63.0

Soha housing comparison table

Improving and maintaining your homes

Repairs completed within target 2009/10

	Repairs completed	Target	Within target		Repairs completed	Target	Within target
Affinity Sutton Group				William Sutton Homes			
Emergencies	21,370	99%	96.61%	Emergencies	11,976	99%	98.15%
Urgent repairs	27,618	98%	92.83%	Urgent repairs	10,208	98%	97.61%
Routine repairs	66,261	97%	94.77%	Routine repairs	30,610	97%	98.37%
Broomleigh				External benchmarks			
Emergencies	5,552	99%	96.24%	■ Peabody		86.1%	92%
Urgent repairs	7,661	98%	94.24%	■ Hyde Group		n/a*	n/a*
Routine repairs	20,821	97%	93.28%	■ Genesis Group		94.6%	97%
Downland				■ Southern Housing Group		83.6%	n/a*
Emergencies	3,842	99%	92.35%	■ Family Mosaic		98.0%	100%
Urgent repairs	9,749	98%	86.73%				
Routine repairs	14,828	97%	89.45%				

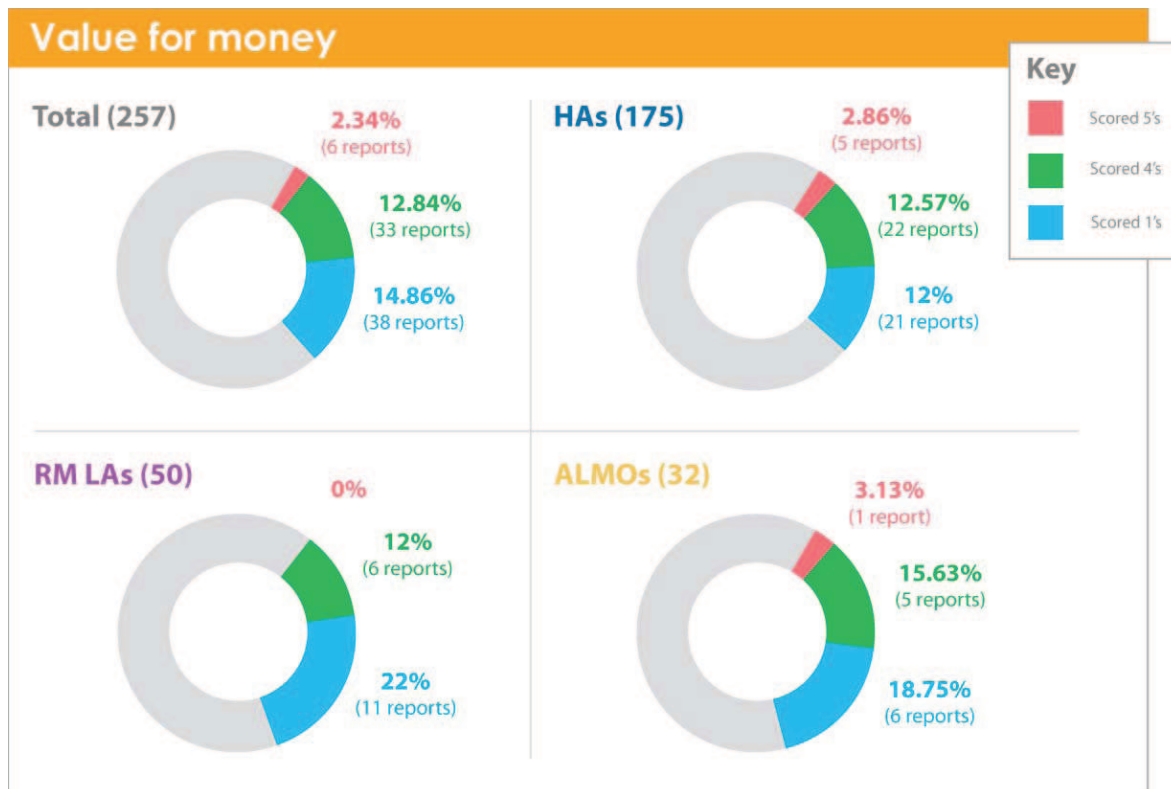
*Figures not available

Affinity Sutton comparison table

Key performance being monitored	2009/10	April – July 2010	2010/11 Target	Performance results for the best performing landlords in England
Day to day repairs where appointments were made and kept	97%	99.3%	99%	98.7%
Day to day repairs delivered within timescales	86.3%	98.8%	98%	98.65%
Day to day repairs - rate of first time fix	89.5%	92.5%	90%	93.98%
Non-decent council homes	44.9%	44.9%	44.9%	3%
Customer satisfaction with the repairs service	90%	95.3%	95%	95%

Homes in Sedgemoor comparison table

Value for money



We were looking for an ongoing commitment from landlords to working with their tenants to identify opportunities to improve the Value for Money of the landlord's services. Most landlords listed a range of actions that had led to improved efficiency/effectiveness, but only a small number of landlords identified an intention to work with their tenants on Value for Money, and fewer still that they had done already.

We were concerned that many landlords seemed to equate Value for Money solely with cutting costs, as opposed to establishing greater efficiency or effectiveness. In particularly many reports referred to cutting the costs of tenant empowerment as a universally accepted positive principle without any explanation.

The following are of particular note in relation to Value for Money:

- **Guinness Northern Counties** and **Calico** had cross cutting sections on Value for Money in relation to the service standards sections (ie. Involvement/Empowerment; Home; Tenancy; Neighbourhood/Community)
- **Bernicia/Cheviot**, **City of Lincoln**, **Irwell Valley** and **Knightstone** all have existing Value for Money tenant groups. **Connect** and **Guinness Northern Counties** have plans to establish arrangements to involve tenants in Value for Money
- **Guinness Northern Counties** and **Cross Keys Homes** had good tenant orientated explanations of Value for Money

Value for Money isn't just about making financial savings – there are lots of other considerations, for example, sustainability (long-lasting and environmentally friendly), quality and timeliness, which together mean value for money for our customers and our business.

We ensure we use external funding where it is available, for instance our Community Investment Managers work to obtain grants to fund local involvement and community activities. We've developed a way of measuring the impact of involvement both at a local level and centrally, to ensure that all of our involvement methods offer good value for money.

We're consulting with customers on whether extending the hours our main repairs contractor can offer appointments to 6 days a week, between 8am and 8pm, would offer good value for money.

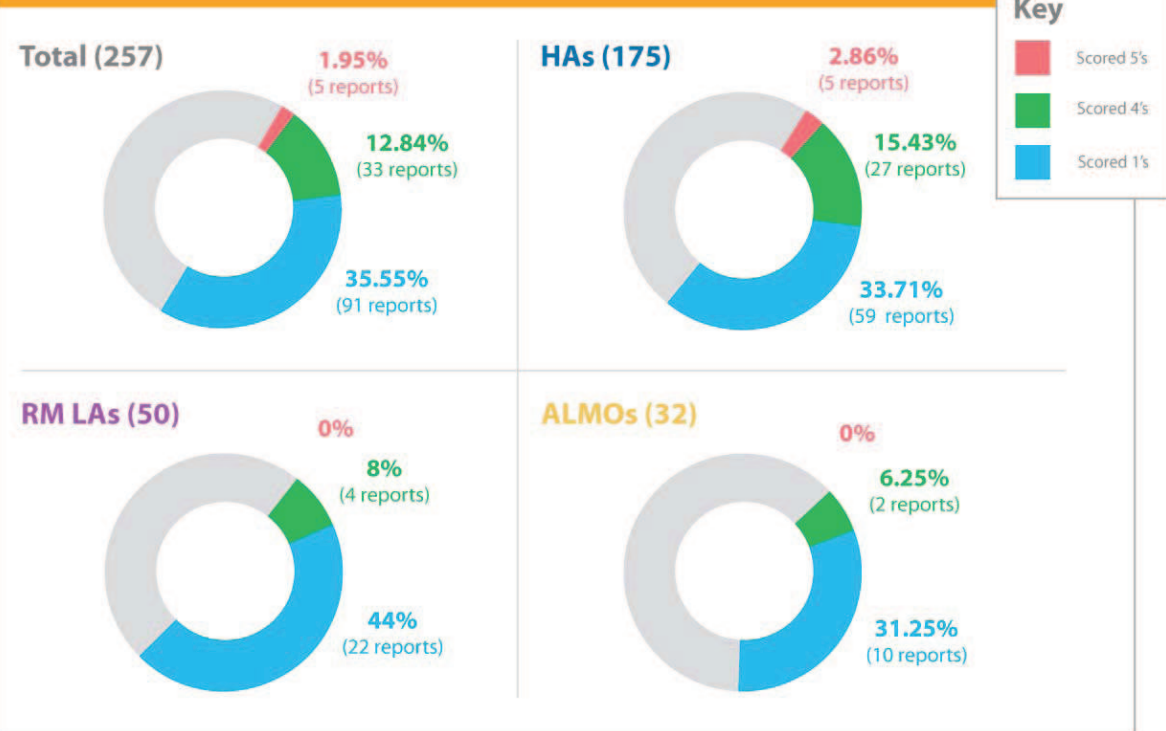
There are other examples in this report of where we've achieved Value for Money.



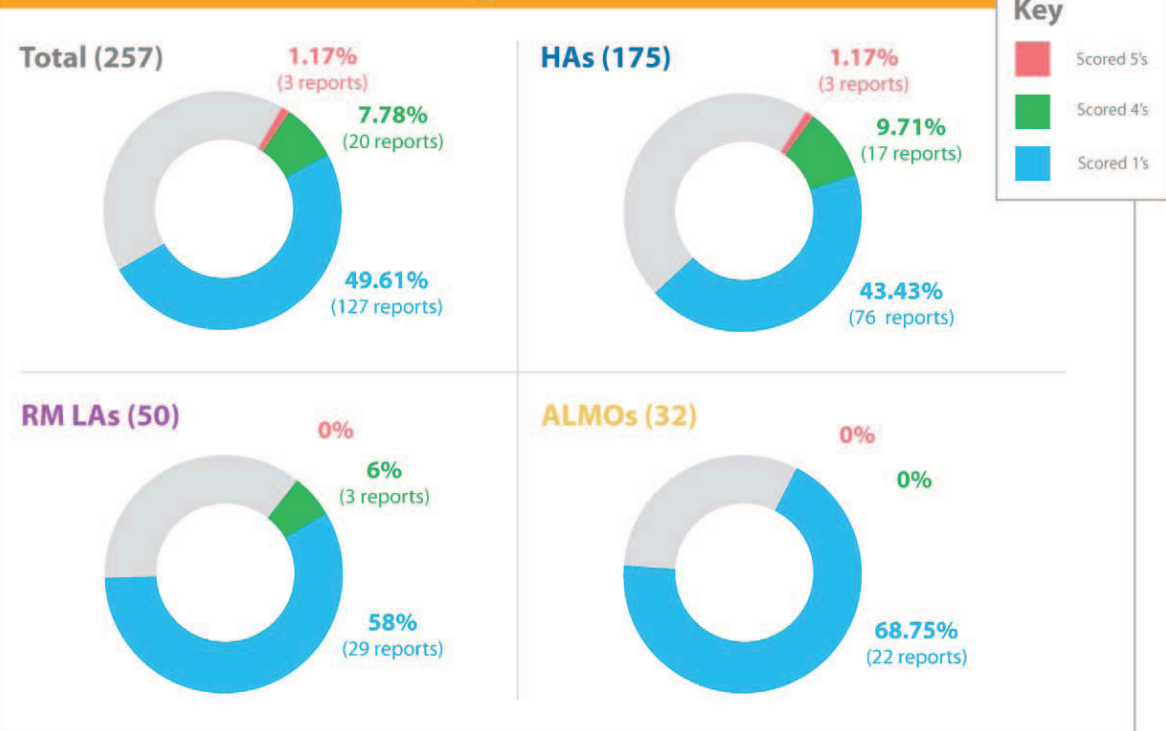
Guinness Northern Counties explanation of Value for Money

Local offers & local action

Local offers definition

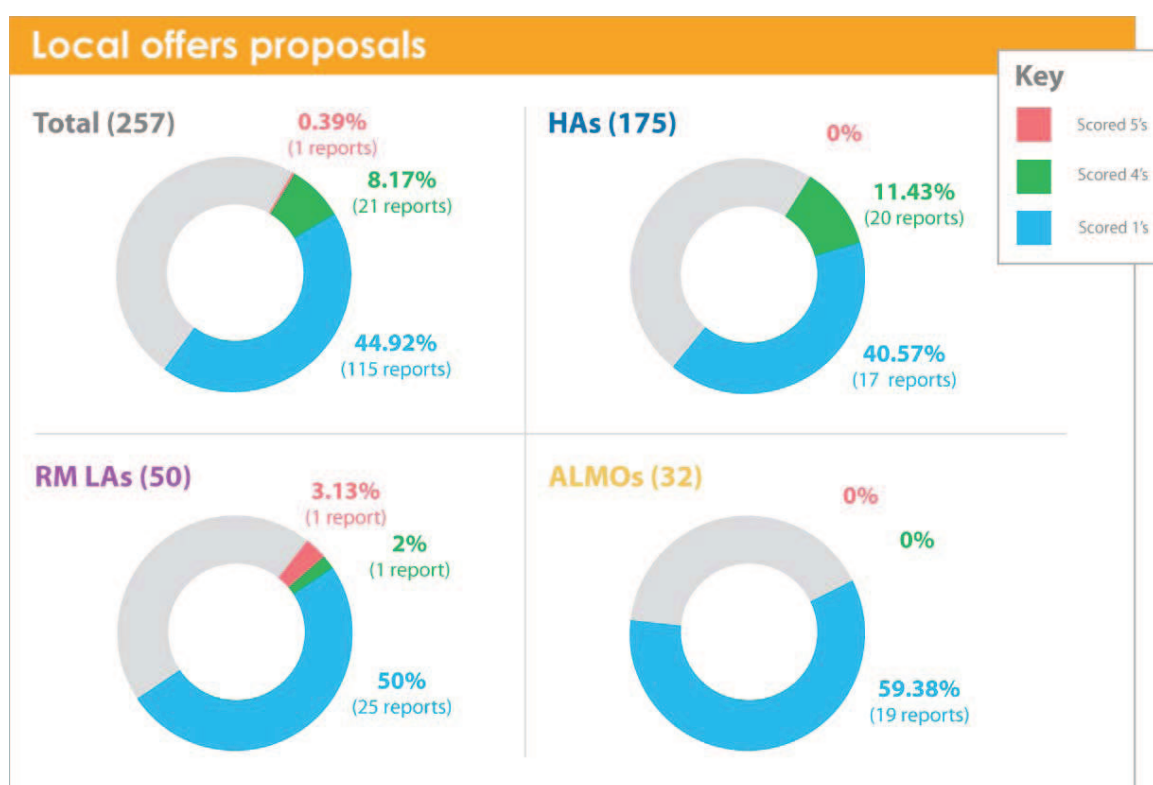


Local offers understanding



Our reviewers considered that landlords had generally not understood the principles behind local offers. The majority of landlords did not consider:

- how to be accountable to or provide information locally at a level that might be appropriate for tenants, or how to adapt services to tenants locally that matched their needs and wishes
- how “local” could apply to anything other than the landlord as a whole – even for landlords managing several thousand homes – sometimes across several counties
- how local offers might cover anything other than basic service issues (like the number of times phones should ring before answering) that should have already been part of the requirement to enable tenants to influence policies and procedures under the Involvement & Empowerment Standard.



Reports that were better in this area portrayed local offers as a multi-dimensional means (possibly in tandem with other landlords) of ensuring different approaches to providing services and engagement to suit the differing needs and aspirations of the diversity of tenants. This approach potentially could enable a greater proportion of the tenant constituency to engage and interact at the level of their choosing.



Several landlords stated that tenants had told them that they did not want offers to be “local” referring to tenant wishes for consistent levels of service. We support tenant wishes, but we wonder whether consistency across a landlord removes the need to adapt services to meet local needs and aspirations? Perhaps landlord wide consistency needs to be balanced with consistency across different landlords in a local area. Is it right that someone who is a tenant of a landlord by virtue of where they happened to be nominated to should receive a poorer service than a tenant of another landlord in the same locality?

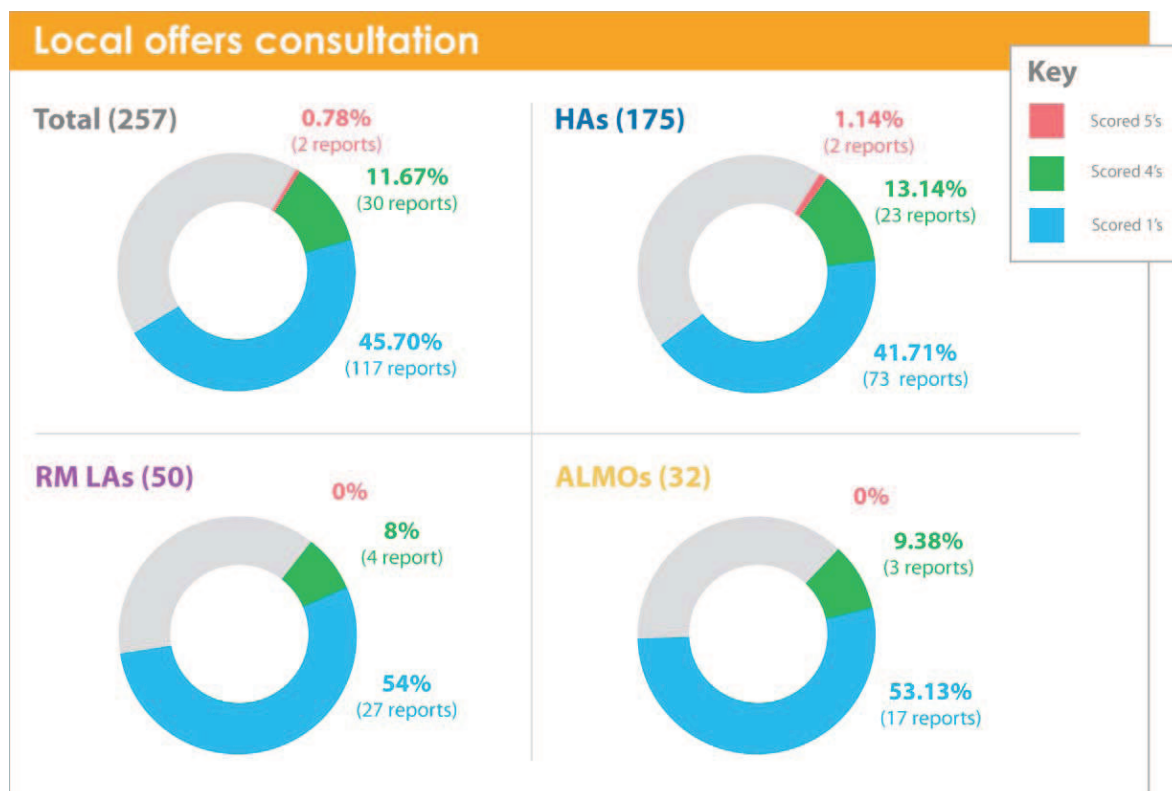
Ironically, some landlords, whilst not referring to local activity as local offers, then described the sorts of actions that might be appropriate to implement local offers in their Neighbourhood & Community and Diversity sections. The TSA’s definition of local offers was not clear, and clearly the important issue is what landlords are doing to adapt their services to meet local needs and aspirations.

We considered that the following landlords did demonstrate a good understanding of local offers in their reports:

<p>HOUSING ASSOCIATIONS</p> <p>Axiom Daventry & District Housing Harvest Housing Hastoe Group Leeds Federated</p>	<p>Paragon Community Housing Synergy Housing</p> <p>COUNCILS/ALMOs</p> <p>Central Bedfordshire Council Leicester City Council Solihull Community Housing</p>
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For **Newlon** tenants, local meant “estate, building or house”, whilst **Solihull Community Housing** referred to “multiple categories by location, property type & tenant needs”. The **Community Gateway Association** and **Greenfields Community Housing** set out how their existing community options studies work were already providing extensive local offer opportunities, whilst **Spectrum Housing Group** referred to local offers being based on existing community forums. **Leeds Federated** referred to delivering neighbourhood based local offers in partnership with other landlords, whilst **Parkway Green Housing Trust** tenants are working with Willow Park Housing Trust tenants to define a local approach - “Wythenshawe’s Got Standards”. **Synergy Housing** provided examples of local offers in neighbourhoods

Despite confusion about local offers, some landlords detailed good consultation processes with their tenants on local offers:



Tenant management

Tenant management enables tenants to exercise control over aspects of the housing service and shape it to their preferences, and as such it is potentially a form of geographic “local offer”. Few landlords picked up on this, although some landlords that support TMOs did refer to them, including:

- WATMOS Community Homes** produced an overall annual report alongside individual reports from its eight constituent TMOs (**Avenues, Burrowes St, Chuckery, Delves East, Delves West, Leamore, Sandbank, Twin Crescents**)



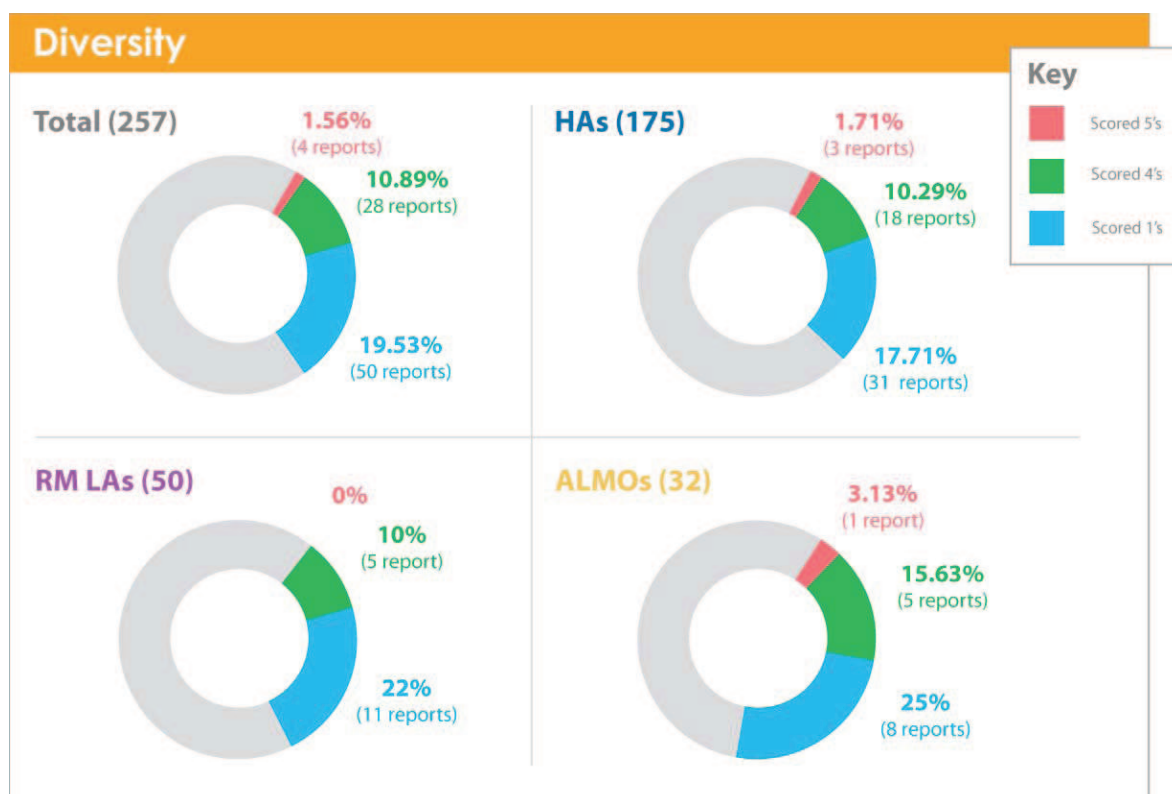
- **Bushbury Hill, Dovecotes, New Park Village, and Springfield Horseshoe TMOs** produced local reports for the areas they manage in Wolverhampton



- **Cotterills Farm & Boscobel TMOs** were separately identified and assessed within **Sandwell Council's** report
- **Carpenters TMO & CTR Triangle TMO** were separately identified and assessed within **Newham Council's** report
- **Langridge & Norton Grange co-ops** were referred to by **Endeavour Housing Association** as developing their own local offer
- **Salix Homes** refers to **New Barracks** and **Windsor Albion co-ops** as developing their own local offer.

It is strange that other landlords whose homes are managed by TMOs (approximately 250 TMOs manage homes in councils and perhaps 50 in housing association homes) did not mention them when discussing local offers.

Diversity



Considering and responding to the needs of the whole tenant constituency is vital and so it is disappointing that 50 reports (just over a fifth of reports we reviewed) made no mention of diversity, and that reference to the lesbian/gay/bisexual/transgender and religion/belief strands were minimal. We were also concerned that reports rarely referred to consideration of other factors, such as work or family commitments, learning difficulties, health issues, or appearance.

We were looking to see landlords making a clear statement of commitment to equality and diversity issues, which some did including **Axiom**, **Bernicia Cheviot Homes**, and **Medina**. Others referred to existing or planned achievement of *Investors in Diversity* status – **Community Gateway Association**, **Joseph Rowntree** and **Wakefield & District Housing**.

Equality and Diversity

Axiom is committed to being a Beacon for Equality and Diversity

What does 'being a beacon' mean?

Becoming a 'beacon' for equality and diversity means that we want to be a 'shining example' to others. We want to show that we understand and are meeting the particular needs of all of our tenants and service users.

We want to ensure that our services work for everyone, regardless of:

age, disability, gender, sexual orientation, race and ethnicity, religion or belief, and transgender

These are called the seven strands of diversity.

How are we doing this?

Last year we did a door knocking survey of all our tenants to make sure the information we hold about you is up to date. We are using this information to ensure that when we, or our contractors, are in contact with you we will know if you have a particular need; such as being hard of hearing or need more time to answer the phone.

It is important we know what you think about our services, so we have an Equality and Diversity group which looks at the feedback you give us on our services and checks it against the seven strands of diversity. If there is something we need to improve for a particular group of people, we will find this out and look for a way to get it done.



Over the next year we will be carrying out "equality impact assessments" of our policies.

This means that we will check that we are taking into account the particular needs of everyone to make sure we have thought of them when producing our policies.

For example, we have a complaints policy that allows people to complain about our services in lots of different ways – by phone, in writing, in person, by email, text etc. If we did not do this, then someone who had difficulty writing or using the phone might not be able to let us know their complaint.

Over the next year we shall be producing Disability, Gender and Race Equality Schemes

This means that we shall be working with people to draw up schemes to plan to make our services even better for people in the future. For example, we might need to improve the access to our offices or to improve our translation service.

We believe that through the work we are undertaking with residents on Equality and Diversity we are making our services even better to meet your personal needs. If you would like to help us by providing feedback, or by joining one of our groups then please let us know.

Axiom's statement on equality and diversity

Gloucester City Homes referred to being the first company to gain the achieving level of the National Equality Framework, and they set out clear, comprehensive and exciting information on each diversity strand.

Understanding and responding to your diverse needs

We work hard to ensure that we treat all tenants with fairness and respect, recognise their different needs and develop our services to reflect these.

In March 2010 we gained the achieving level of the National Equality Framework. We were the first company in England to get this award.

This shows that we:

- give equal access to our services and employment
- promote diversity and community cohesion.

We take diversity information on 90% of our tenants and 80% of our leaseholders. This helps us to understand any specific needs you have and ensure that we provide services to meet these.

We have a clear set of policies and procedures to ensure that neither we, nor our partners, discriminate, either directly or indirectly against any of our residents. We regularly review and update our policies in consultation with our residents and our tenant.

We assess all changes to policies or strategies to make sure that they do not result in people being treated unfairly.

Working to achieve gender and sexual equality

We work closely with the County Equality Group to provide services and support to lesbian, gay, bisexual and transgender residents.

We have a range of policies and practices in place to ensure that our staff and residents are not discriminated against and are protected from harassment and bullying. To ensure this we have robust monitoring arrangements in place across employment and service provision.

We have been a key sponsor and participant in the City's Gay Pride Event for the last three years and in 2009 we became a Stonewall diversity champion.

How we plan to improve in 2010/11

- We will continue to promote effective and innovative ways for excluded or under represented groups to get involved with us so that we can be truly representative of our community.
- We are also committed to having a workforce and Board, which is representative of our community.
- We are working to achieve the equality excellence standard of the new Equality Framework for social housing by 2012.

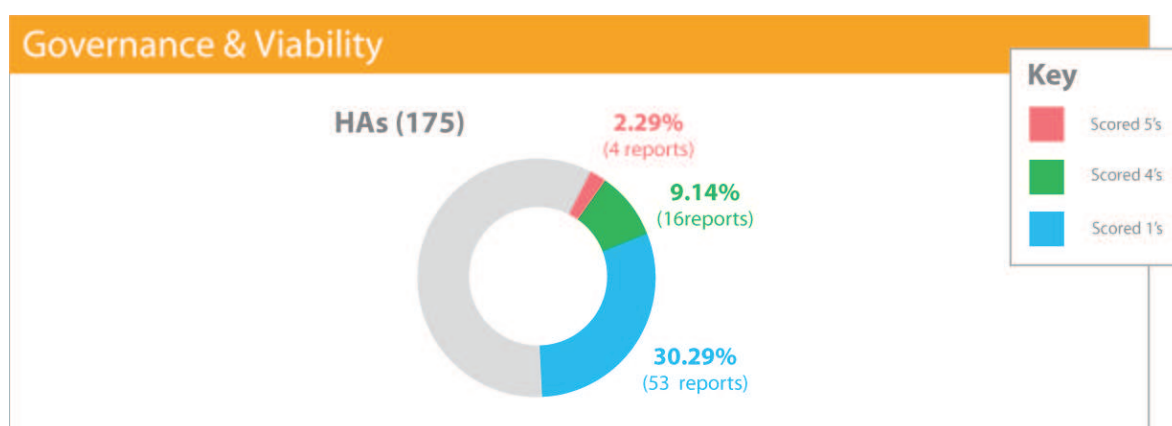
Some of **Gloucester City Homes** section on diversity



Many landlords did include information on profiling of their tenant constituency, but only some discussed how this information was impacting on the provision of their services.

A small number of landlords referred to diversity groups involving tenants, such as **Liverpool Housing Trust** (Tenant Equality & Diversity Forum); **Medina Housing Association** (Diversity Forum); **North Lincolnshire Homes** (Diversity Working Group & Black & Minority Ethnic Tenants Group); **Teign Housing** (Respect for People Group). **Swan** talked about involving tenants in already existing Diversity Forums.

Governance & Viability



The Governance & Viability standard only applies to housing associations, but a number of associations stated that the TSA did not require them to account to tenants for their governance & viability. Others said that governance and viability is checked by the TSA, lenders or other organisations and tenants should take their word that their landlord is well governed and viable.

This approach scored low for our reviewers. Regulation with tenants requires an open and honest approach where landlords encourage their tenants to participate in all aspects of governance, and, if information is presented well to tenants, some will have an interest in governance and viability.

We were pleased that some associations did choose to discuss governance and viability with their tenants. The following were of particular note:

- **Axiom, Beechdale Community Housing Association, Cheshire Peaks & Plains Housing Trust, Eastend Homes, Erismus Housing, Estuary Housing Association, First Wessex** and **Poplar HARCA** – all of whom provided a comprehensive account of their governance and viability – many also providing good and clear explanations.
- several landlords included information from their accounts, and we make particular reference to **Soha Housing, Marches Housing Association** and **Wakefield & District Housing** who explained their accounts as well.

Consolidated Income and Expenditure Account for the year ended 31 March 2010		
	2010 £'000	2009 £'000
Turnover	28,996	27,507
Cost of sales	(4,544)	(3,462)
Operating costs	(15,165)	(16,349)
Operating surplus	9,287	7,696
(Deficit)/Surplus on sale of properties	(87)	1,018
Interest payable	(5,229)	(6,367)
Surplus for the year	3,971	2,347

Turnover is the income Soha receives as rent. It can also include other income from the properties they manage. It also includes sales of shared ownership and other properties.


Surplus Soha has made a surplus again this year. This means more money has been received than spent. In previous years Soha made a deficit (ie spent more money than received), so any surplus goes to pay off deficits from previous years. Any then left over is reinvested.

Operating costs is the money spent on managing and repairing properties as well as the running costs of the office and staff.

Surplus on sale of properties is the money Soha has received from selling houses and flats under the Right to Buy and other similar schemes, less the value of the properties.

Interest payable is the total interest charged on loans, minus the interest they receive on bank deposits.

Part of Soha Housing's explanation of their accounts

- 
- some associations showed how tenant bodies fitted into their governance structure – most notably **Poplar HARCA** and the four community gateways associations (**Community Gateway Association, Watford Community Housing Trust, Phoenix Community Housing** and **Greenfields Community Homes**).
 - **Oxford Citizen/Westlea** indicated board member expenses & remuneration expenditure. Given the recent publicity on expenses, we were surprised that more landlords did not take this approach, or that no landlord provided or compared information on senior staff salaries – an area where we would expect landlords to be accountable to their tenants.

Given that the governance and viability standard does not apply to councils, it was particularly pleasing that **North Tyneside Housing** chose to explain how council governance works; whilst ALMOs **Gloucester City Homes, Rykneld Homes, Salix Homes** and **Your Homes Newcastle** had comprehensive sections on governance and viability.

Feedback

Many landlords issued feedback forms to enable tenants to comment on the annual report and the assessments given. We particularly liked the comprehensiveness of the **City of Lincoln** feedback form; **Cheltenham Borough Homes** asking tenants if it's a good idea to send out a report in future; and **Arun District Council** enabling their tenants to vote on whether they agreed with the assessment given to each standard.



What we didn't like

Self-congratulatory PR exercises – of which there were many! Total waste of time and paper!

Reports that had been produced not for tenants but because the TSA had told landlords to produce them. We invite any landlord who does not think it a good idea to account to their tenants at least once a year to give serious consideration as to whether there is any reason for them to continue in the business of housing.

Landlords reeling off section after section on “what we do well” without acknowledging “what we don’t do well”

Landlords who said “if you want information on that – just ask”

Large landlords only using global figures to measure their performance - thereby potentially masking poor performance in particular areas

Large group structures using the same format of report for all parts of their group – thereby not recognising any local variations or enabling tenants and staff of subsidiaries to have any individuality

Landlords only comparing their performance with particular groups of landlords performing equally badly

Landlords patronising tenants by telling them that the TSA, the Audit Commission, lenders, auditors, councils, the G15 or anyone else have said that we are good at whatever and so you don't have to worry your heads about that



Over-reliance on STATUS surveys and satisfaction statistics. Surveys are tools that can form a part of an assessment of whether a service is effective or not – an assessment that will ultimately require the landlord and its tenants making a judgment based on the evidence available.

Transferring associations who decided that they wouldn't bother with local offers because tenants had already been consulted prior to transfer

The one report that was used to promote stock transfer

The landlord who consulted its tenants to ask what local meant to them and was told it meant “estate, village or parish”, but they still decided that they were going to provide one local offer anyway!

The landlord who delegated responsibility for production of the annual report to a Tenant Participation Officer with no discernible involvement from any other members of staff or tenants

Reports that did not refer to the standards and landlords who made it clear that they didn't want to be subject to them. The standards were developed through an unprecedented process involving tenants and landlords and they are there to develop and protect quality of life for all tenants. Tenants have a right to be told about the standards they should expect, and it is arrogant for landlords to decide that they do not need to be told of them.

The 20 lowest scoring reports (8 housing associations & 12 councils – no ALMOs). Some of these reports did not refer to the standards. Some seemed like committee reports. Some seemed to be arrogantly suggesting that they were above the standards. Some seemed to be performing badly and had no plans to improve. If landlords aren't prepared to accept and meet basic standards, we suggest that you give your homes to someone else who will.



What can you do now?

At the beginning of this report, we pointed out that a key purpose of annual reports to tenants is to help tenants successfully fulfil their vital role of scrutinising their landlords and assessing the quality of their service.

We close by setting out a few pointers for tenants and landlords about what you can do to make annual reports a more effective tool for tenants to hold landlords to account.

If you are a tenant or a landlord:

- please look at the good examples we have highlighted in this report and consider how the approaches used could be adapted for you
- but don't just do that. Come up with new ideas and new ways to encourage and support tenants to work with their landlord to improve services and effectiveness
- don't use anyone's formulas to develop annual reports. Developing your annual report should be a local partnership process between tenants and landlords that is unique to you. Other than it should be a genuine partnership between tenants and landlords, there is not a right or wrong way to get reports right.
- consider whether you should stop doing the things we said we didn't like. If you disagree with us about any of those things, we don't mind – provided your disagreement comes from a genuine debate between tenants and landlord.
- remember that annual reports are a tool to enable tenants to hold the landlord to account and to improve services. Come up with different ways to achieve that outcome.

If you are a tenant:

- if you are happy with the way you have been involved in the development of your annual report, and if you consider that you and your fellow tenants are able to hold your landlord to account because of it – then keep up the good work – and tell other tenants about it!



- expect high standards. Expect to be involved in developing your annual report and for tenants to lead on it. Expect to be able to hold your landlord to account.
- use our report to show to your landlord that other landlords are empowering their tenants and are encouraging tenants to challenge them to perform better.

Remember – there are landlords of every type who are performing well – housing associations, local authorities, ALMOs, large landlords, small landlords, national landlords, local landlords.

- work together with your fellow tenants – welcome in tenants who aren't usually involved or who come from a different background or who have different views. Do what you can to reflect the views of all the tenant constituency.
- seek to work in partnership with your landlord – most are now keen to work in partnership with tenants.
- talk to tenants of other landlords, particularly in your local area, to find out their experiences of annual reports.
- if you are not happy with your landlord's approach to annual reports, work with your fellow tenants to try to change it through discussion with your landlord. If that doesn't work, get in touch with your local tenant panel (if there is one), your local councillors, or your local MP.
- and you can get in touch with one of the National Tenant Organisations, and we will try to help if we can.


If you are a landlord:

- respect the regulatory standards and tell your tenants about them. They were agreed by an unprecedented number of tenants and landlords as being a common set of standards that tenants should expect from their landlord.
- work with your tenants to go way beyond the regulatory standards!
- encourage your tenants to get involved and understand how important their voluntary activities are to your business.

The reports we reviewed

We were given annual reports from the landlords below to review. The TSA gave the NTOs a random sample of 259 annual reports to review that gave a breadth of landlord type, size and geographical coverage. No conclusions can be drawn regarding reports that we were not given to review. Other reports may also have excellent qualities.

Landlord	Landlord type
A1 Housing	LA ALMO
A2 Dominion	HA
Accent Foundation	HA
Accord Housing Group	HA
Affinity Sutton	HA
Aldwyck Housing Group	HA
Amber Valley Housing	HA
Amicus Horizon	HA
Arena	HA
Arun District Council	LA
Ashram Housing Association	HA
Aspire Housing	HA
Aster Group	HA
Axiom Housing Association	HA
Barrow Borough Council	LA
Basildon Council	LA
Bedford Pilgrims Housing Association	HA
Beechdale Community Housing Association	HA
Berneslei Homes	LA ALMO
Bernicia Cheviot Homes	HA
Bolton At Home	LA ALMO
Boston Mayflower	HA
Bournemouth Borough Council	LA
Bournville Village Trust	HA
Bracknell Forest Homes	HA
Brighton & Hove City Council	LA
Bristol City Council	LA
Broadacres	HA
Broadland Housing	HA
Bromford	HA
Bromsgrove District Housing Trust	HA
Broxbourne Housing Association	HA
Calico	HA
Cambridge City Council	LA
Cambridge Housing Society	HA
Cannock Chase Council	LA
Carrick Housing & Cornwall Council	LA ALMO
Castle Vale Community Housing Association	HA
Central Bedfordshire Council	LA



Landlord	Landlord type
Charnwood Neighbourhood Housing	LA ALMO
Charter Community Housing	HA
Chelmer Housing Partnership	HA
Cheltenham Borough Homes	LA ALMO
Cheshire Peaks & Plains Housing Association	HA
Cheshire West & Chester Council	LA
Chester & District Housing Trust	HA
Chesterfield Borough Council	LA
Chevin Housing Group	HA
City of Lincoln	LA
Coast & Country	HA
Colchester Borough Council	LA ALMO
Colne Housing	HA
Community Gateway Association	HA
Community Housing Group	HA
Connect Housing	HA
Contour Homes	HA
Corby Borough Council	LA
Cornwall Council	LA
Cross Keys Homes	HA
Croydon	LA
Croydon Churches Housing Association	HA
Dacorum Borough Council	LA
Daventry & District Housing	HA
Devon & Cornwall Housing Trust	HA
Dudley Metropolitan Borough Council	LA
Ealing Council & Ealing Homes	LA ALMO
East Homes	HA
East Midlands Housing Group	HA
Eastbourne Homes	LA ALMO
Eastend Homes	HA
Eden Housing	HA
Endeavour Housing Association	HA
Epping Forest District Council	LA
Erismus Housing	HA
Estuary Housing Association	HA
Exeter City Council	LA
Family Housing	HA
Festival Housing Group	HA
First Wessex	HA
Freebridge Community Housing	HA
Gedling Homes	HA
Gloucester City Homes	LA ALMO
Golden Gates Housing	LA ALMO
Gosport Borough Housing	LA
Great Places Housing Group	HA
Great Yarmouth Community Housing	LA
Greenfields Community Housing	HA
Greenwich Council	LA
Guinness Northern Counties	HA
Hackney Council / Hackney Homes	LA ALMO
Haig Homes	HA

Landlord	Landlord type
Halton Housing Trust	HA
Harlow District Council	LA
Harrogate Borough Council	LA
Harrow Council	LA
Hartlepool Housing	HA
Harvest Housing Group	HA
Hastoe Housing Association	HA
Heantun Housing	HA
Helena Partnerships	HA
Herefordshire Housing	HA
Hexagon Housing Association	HA
Hightown Praetorian & Churches Housing Association	HA
Hillingdon Housing Service	LA
Hounslow Homes	LA ALMO
Housing Solutions	HA
Howard Cottage Housing Association	HA
Hull City Council	LA
Hundreds Housing Society	HA
Hyde Group	HA
Hyndburn Homes	HA
Incommunities	HA
Ipswich Borough Council	LA
Irwell Valley	HA
ISOS Housing	HA
Jephson Housing Association Group	HA
Johnnie Johnson Housing	HA
Joseph Rowntree Housing Trust	HA
Kettering Borough Council	LA
King Street Housing Society	HA
Knightstone	HA
Lancaster City Council	LA
Leeds Federated	HA
Leicester City Council	LA
Lewisham Homes	LA ALMO
Liverpool Housing Trust	HA
Local Space	HA
Longhurst Group	HA
Luminas Group	HA
Luton Borough Council	LA
Magna & Magna West Housing Associations	HA
Manchester City Council	LA
Mansfield District Council	LA
Marches Housing Association	HA
Medina Housing Association	HA
Metropolitan Housing Trust	HA
Midland Heart	HA
Moseley & District Churches Housing Association	HA
Mossbank Homes	HA
Mosscare Housing	HA
Network Housing Group	HA
New Charter Homes	HA
Newham Council	LA ALMO

Landlord	Landlord type
Newlon Housing	HA
North Devon Homes	HA
North Hertfordshire Homes	HA
North Lincolnshire Homes	HA
North Tyneside Housing Matters	LA
North Warwickshire Borough Council	LA
Northampton Borough Council	LA
Northumberland County Council & Homes for Northumberland	LA ALMO
Norwich City Council	LA
Notting Hill Housing Trust	HA
Nottingham Community Housing Association	HA
NS Housing	HA
Oadby & Wigston Council	LA
Octavia Housing	HA
One Housing Group	HA
One Vision Housing	HA
Optima Community Association	HA
Orbit Heart	HA
Origin Housing	HA
Orwell Housing Association	HA
Oxford Citizen Housing Association	HA
Oxford City Homes	LA
Paragon Community Housing	HA
Parkway Green Housing Trust	HA
Peabody	HA
Phoenix Community Housing	HA
Pickering & Ferens Homes	HA
Pierhead Housing	HA
Poole Housing Partnership	LA ALMO
Poplar HARCA	HA
Progress Care	HA
Raglan	HA
Raven Housing Trust	HA
RB Kensington & Chelsea & Kensington & Chelsea TMO	LA ALMO
Regenda Group	HA
Richmond Housing Partnership	HA
Richmondshire District Council	LA
Riverside Housing Group	HA
Rooftop Housing Group	HA
Rosebery Housing Association	HA
Rugby Borough Council	LA
Ryknelde Homes	LA ALMO
Sadeh Lok Housing Group	HA
Salix Homes	LA ALMO
Sandwell Borough Council	LA ALMO
Saxon Weald	HA
Homes in Sedgemoor	LA ALMO
Selwood Housing	HA
Sentinel Housing Association	HA
Seven Locks Housing	HA
Severn Vale Housing	HA
Sevenside Housing	HA

Landlord	Landlord type
Sheffield City Council	LA ALMO
Shropshire Rural Housing Association	HA
Signpost Housing Association	HA
Soha Housing	HA
Solihull Community Housing	LA ALMO
Solon South West Housing Association	HA
South Essex Homes	LA ALMO
South Lakes Housing	LA ALMO
South Liverpool Housing	HA
South Northants Homes	HA
South Staffordshire Housing Association	HA
South Tyneside Homes	LA ALMO
Southern Housing Group	HA
Southwark Council	LA
Southway Housing Trust	HA
Sovereign Kingfisher	HA
Spire Homes	HA
Stafford & Rural Homes	HA
Stevenage Homes	LA ALMO
City of Stoke on Trent	LA
Suffolk Housing Society	HA
Swan	HA
Synergy Housing	HA
Tamworth Borough Council	LA
Tarka Housing	HA
Tees Valley Housing	HA
Teign Housing	HA
Tendring District Council	LA
Thames Valley Housing	HA
Thanet District Council	LA
Thrive Homes	HA
Thurrock Council	LA
Tower Hamlets Homes	LA ALMO
Tower Hamlets Community Housing	HA
Trafford Housing Trust	HA
Trent & Dove Housing	HA
Tristar Homes	LA ALMO
Tuntum Housing	HA
Uttlesford District Housing	LA
Victory Housing Trust	HA
Viridian	HA
Wakefield & District Housing	HA
Wandle Housing Association	HA
Warrington Housing Association	HA
Watford Community Housing Trust	HA
WATMOS Community Homes	HA
Weaver Vale Housing Trust	HA
West Country Housing	HA
West Mercia Housing Association	HA
Western Challenge Housing Association	HA
Westlea Housing	HA
Wirral Partnership	HA



Landlord	Landlord type
Wolverhampton Homes	LA ALMO
Worcester Community Housing	HA
Worthing Homes	HA
Wrekin Housing Trust	HA
Wulvern Housing	HA
Wycombe District Council	LA
Yarlington Housing Group	HA
Yorkshire Coast Homes	HA
Yorkshire Housing	HA
Your Homes Newcastle	LA ALMO

Our review team and our reading group

Our review team worked hard over Christmas to review the reports, and we thank them for their hard work and diligence. The review team were:

Name	Organisation
Ursula Barrington	WATMOS
Trevor Bell	NFTMO
Nic Bliss	CCH
Cora Carter	TAROE
Michael Gelling	TAROE
Steve Kerley	Godwin & Crowndale
Reg Kerr-Bell	Kensington & Chelsea TMO
Martyn Kingsford	TAROE
Blase Lambert	CCH
Michelle Reid	TPAS
Nick Reynolds	Roman Way TMO
Richard Tarling	Charfield Court Co-op
Karen Williams	Bushbury Hill EMB

We also circulated a draft version of the report to a reading group made up of the people listed below and they made many helpful comments which we have used to improve the report. We give big thanks to our reading group for their time and assistance.

Name	Organisation
Richard Crossley	Tenant empowerment consultant
Jane Denchfield	Tenant Services Authority
Graeme Foster	Tenant Services Authority
Ian Hembrow	The Bridge Group
Jennifer Holmes	TSA Tenant Sounding Board
John Jennings	Tenant representative
Debbie Lerner	Chartered Institute of Housing
Diane Lee	TSA Tenant Sounding Board
Ruth Lucas	Lucas Policy Consultants
Alistair McIntosh	National Federation of ALMOs
Pam McIvor	Tenant representative
Lara Oyedele	Odu-Dua Housing Association
Clifton Robinson	Housing Diversity Network
Steve Smedley	Housemark
Martin Wheatley	Local Government Association
Helen Williams	National Housing Federation

The National Tenants Organisations

Confederation of Co-operative Housing (CCH)

CCH was formed in 1993 as the representative body for co-operative and mutual housing. Its membership is open to housing co-operatives, community-controlled housing organisations, and any other organisation that supports co-op housing.

Address: 19 Devonshire Road, Liverpool L8 3TX
Phone Number: 0151 726 2228
e-mail: info@cch.coop
Website: www.cch.coop

National Federation of Tenant Management Organisations (NFTMO)

The NFTMO was founded in 1992 and represents tenant management co-ops, estate management boards and other forms of tenant management organisations in the council and housing association sector.

Address: Resource Centre, Burrowes Street, Walsall WS2 8NN
Phone Number: 01704 227053
e-mail: contact@nftmo.com
Website: www.nftmo.com

Tenants and Residents Organisations of England (TAROE)

TAROE was founded in 1997 as the representative body for tenants in social housing in England. Membership is open to regional tenant bodies, tenant federations, tenant and resident associations, and individual tenants.

Address: Jackson House, 2nd Avenue, Runcorn WA7 2PD
Phone Number: 01928 701001
e-mail: runcornoffice@taroe.org
Website: www.taroe.org

Tenant Participation Advisory Service (TPAS)

Formed in 1988, TPAS is a social enterprise that provides tenant empowerment services to tenants and landlords. It has a membership made up of tenants' groups and social housing landlords in England who believe in tenant involvement.

Address: 5th Floor, Trafford House, Chester Road, Manchester M32 0RS
Phone Number: 0161 868 3500
e-mail: info@tpas.org.uk
Website: www.tpas.org.uk



