

Local offers toolkit



TSA

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Local offers toolkit

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Introduction

The Tenant Services Authority's regulatory framework represents a dramatic shift in the way social housing providers are regulated. The TSA's 'co-regulatory' approach will require more robust self-assessment by landlords, subject to a 'backbone of regulation' from the TSA.

There will be less national prescription. No longer, the TSA stresses, will it be 'one size fits all'. For the first time, all providers will need to meet the same national standards. But these national standards will be supplemented by local offers, agreed between landlords and their tenants on the issues that matter most on a local level. This toolkit, compiled by HQN, is designed to help you get your local offers right.

What are local offers?

Local offers represent a new way of tailoring the services of social housing providers based on what tenants want. All providers must ask tenants if they want local offers against the TSA's national standards. They must tell tenants in their annual report by 1 October 2010 how they will put offers in place. Those offers must come into force by 1 April 2011.

Local offers could take in a number of different areas. For example, how you consult tenants, manage your neighbourhoods or estates, or run your repairs service could each become the basis for a local offer.

The national standards cover performance in these areas:

National standard	Requirements
Tenant involvement and empowerment	<ul style="list-style-type: none"> Customer service, choice and complaints Involvement and empowerment Understanding and responding to diverse needs of tenants
Home	<ul style="list-style-type: none"> Quality of accommodation Repairs and maintenance
Tenancy	<ul style="list-style-type: none"> Allocations Rents (not applicable to councils) Tenure
Neighbourhood and community	<ul style="list-style-type: none"> Neighbourhood management Local area co-operation Anti-social behaviour
Value for money	<ul style="list-style-type: none"> Value for money
Governance and financial viability (not applicable to councils)	<ul style="list-style-type: none"> Financial viability

Providers must talk to their tenants about setting local offers against the national standards for:

- tenant involvement and empowerment
- home
- neighbourhood and community

Tenants can agree local offers with providers around the other standards if they wish.

The TSA worked with a group of providers that tested local offers. At some, tenants wanted local offers amongst all the providers based in an estate, town or county. Elsewhere the local offer was just for the tenants of one provider. Either option

is acceptable to the TSA as long as the provider involves tenants properly in the decision.

A report explaining what the trailblazers did and what they learnt is available from the TSA by visiting www.tenantservicesauthority.org or calling 0845 230 7000.

We hope the report and this toolkit will also bust some myths about local offers.

Myth one: local offers are too expensive

This is like the old scare story about tenants wanting gold bath taps. It's never happened and it won't happen. When providers spoke to tenants, they wanted very similar services with predictable variations by age of tenants and type of property. Tenants and front line staff know the score. They have a firm grasp of what is affordable. They live within tight budgets every single day of their lives.

Myth two: tenants just aren't interested in these local offers

The 700+ tenants across Midland Heart's Staffordshire operation, the young residents of Chapter 1's homes and the tenants in Terrington St Clement, Norfolk, would disagree. They want the same peace and quiet their owner-occupier neighbours get. The local offer trailblazers talked to tenants about things that mattered and got an enthusiastic response.

Myth three: the big associations won't play ball, it's a pointless distraction

If that were the case Circle Anglia, Home and A2 Dominion wouldn't all have got involved in the trailblazers – but they did, and some in more than one. Perhaps they were learning from other sectors. Sainsbury's claim that their loyalty card lets them tailor offers (terminology also used by the TSA) to precisely the right customers. Those without data make blunderbuss and expensive special offers.

How to use this toolkit

Drawing on the work of the trailblazers, this toolkit offers practical advice to providers on setting cost-effective local offers that make a real difference to tenants. It includes:

- a description of what local offers will look like at the best providers
- a step-by-step guide to setting local offers with useful tips, pitfalls to avoid, examples from the trailblazers and self-assessment questions
- a summary of the scope of the trailblazers' local offers

Providers can use the self-assessment questions to test progress. Key questions for board members, tenants and managers are listed on page 25. These can be used as the basis of individual assessments or group discussions.

The trailblazers all made new offers. Many providers will have consulted tenants on service standards in recent years. You can go through this toolkit to help decide whether your service standards will work as the basis for local offers. Do you have all the evidence specified in the self-assessment questions? If so, that's fine. The TSA wants you to agree local offers with tenants – not waste time on unnecessary work.

The toolkit is also a suggested way of working and does not provide all the answers. It draws together some of the main lessons from the trailblazers, but there is no substitute for you working out with your tenants what local means and how you can put local offers together. Everyone is different.

What will the best providers look like?

Local offers from the best providers will be for the right services, in the right locations, for the right tenants and at the right cost.

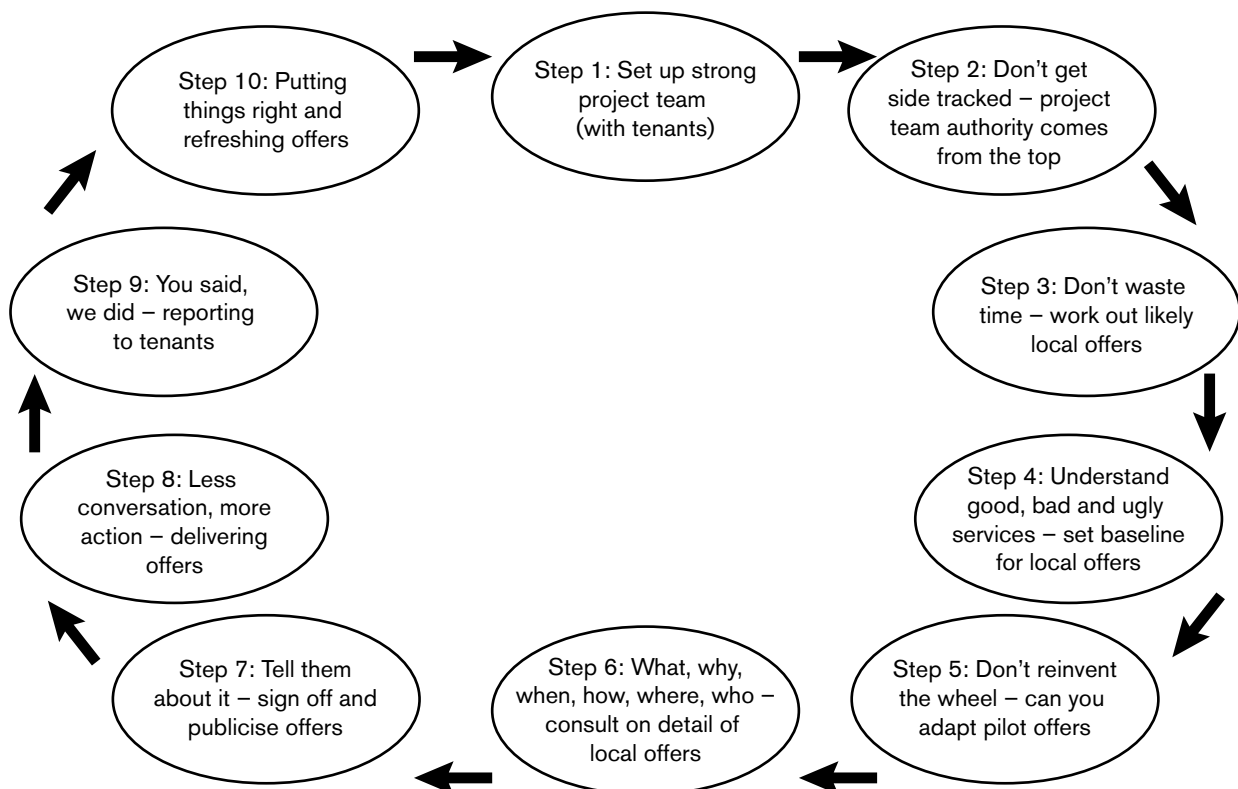
Key features will be that:

- tenants see the difference local offers are making to things that matter
- local offers lead to increased tenant satisfaction and value for money
- a wide cross-section of tenants is involved in setting and monitoring the local offers – reaching well beyond the usual suspects
- reliable systems to check local offer delivery are in place
- tenants know whether they are getting a good deal
- cost-effective local offers compare well against other providers
- local offers don't stand still – the provider is always striving to improve

How do we go about setting local offers?

A step-by-step guide

The steps needed to set local offers are summarised in this diagram. Our toolkit uses these steps to spell out what is required at each stage:



Step 1: Set up strong project team (with tenants)

Many of the trailblazers had really strong and effective project teams that overcame setbacks. The trailblazer in Workington, for example, prepared a local offer across four providers despite the town getting heavily flooded.

Any good project team must include the right blend of skills and attributes. Together project members

should be resilient, with a can-do attitude. Make sure the project team includes people:

- with analytical skills (especially numeracy)
- with first hand knowledge of frontline services
- with a proven track record of delivering to time and budget
- with clout to get things done at the provider
- with the desire to improve services and give tenants more choice
- who communicate in plain English

The team must include tenants as full members. Ensure that these tenants get all the training and support they need to be effective. Local offer project teams benefited from the realism of tenants – they hate wasting money and time.

What are the pitfalls to avoid?

“It’s like moving juggernauts.” That’s how one local offer project manager described the process of getting agreement from numerous providers and council departments. Weak partners threatened to delay progress and curb the ambitions of some local offers. Despite that, trailblazers did produce local offers that tenants wanted. Enthusiastic and committed project managers overcame the obstacles. Joint work is plainly needed if providers are to change neighbourhoods for the better where responsibilities are shared. People are the answer. All the providers must allocate effective staff members, not makeweights, to local offer projects. It is doubtful whether the Hampshire trailblazer would

have worked so well without the considerable input from a director from one of the housing association partners.

Avoid same old, same old: don’t just do what you’ve always done. Think about appointing a peer reviewer or outside expert to challenge you. The Wolverhampton trailblazer said that its progress was accelerated thanks to an independent expert on resident involvement. Bristol appointed a well-known consultant on aids and adaptations to lead its trailblazer.

Lack of capacity: many trailblazers pooled resources. At the Hillingdon trailblazer one association contributed resident inspector training, another gave advice on scrutiny, while others helped with consulting young people or those with support needs. In the trailblazer project led by Wherry in Norfolk all the providers across one village worked with the council on letting a new contract to improve neighbourhood management. At

Key questions

Question	Answer with evidence	To do list
Do we have a strong project team with the right skills and attitude to get things done?		
Can our project team break the mould to develop new local offers that are challenging but affordable?		
Are the voices of tenants heard loud and clear by the project team?		

Hillingdon, Hounslow and Lewisham staff from the local authority strategic function played a big part in driving the projects.

Step 2: Don't get sidetracked – project team authority comes from the top

The most effective local offer project teams integrated the grass roots with the top table. They had good links with formal and informal tenants' groups, as well as the boardroom or council chamber. Despite all the competing pressures on their time, the boards and committees of the trailblazers did take local offers seriously.

What are the pitfalls to avoid?

Penny wise and pound-foolish: doing the bare minimum to comply. Some might say there just isn't the money for local offers, and downgrade the exercise. It might be that the leaders of certain providers want to concentrate on development or

mergers rather than tailoring existing services. The trailblazers included a wide spread of providers by size, type and location. All found it possible to develop cost-effective local offers that tenants wanted.

A big lesson from the trailblazers was about how realistic tenants were. Local offers don't cost the earth. As one project leader said, "The tenants would love new fencing everywhere, but they know we can't afford it, so they asked for sensible things instead." On the basis of the trailblazers it is possible to reconcile what tenants want with what providers can afford. And we saw real enthusiasm from tenants about the offers, which could bring competitive advantage. A track record of popular local offers may convince local authorities and their tenants that one transfer or regeneration partner is better than another. "What is your approach to local offers?" is already a standard interview question when local authorities select partners.

Key questions

Question	Answer with evidence	To do list
Does your board or council take local offers seriously? When were these last discussed? Do you know what progress has been made and what still needs to be done?		
Does the local offers project team really know what tenants want? Can they prove this?		
Is your board or council prioritising local offers where you work with others? Are you helping make progress or holding others back?		

The chain is only as strong as its weakest link: some joint trailblazers reported delays caused by certain boards and councils. Of course moving local offers through various governance structures takes time. Different priorities grab senior attention for all sorts of good reasons. But you don't want to be the provider that slows progress through bureaucracy. If the local offer matters, make the time.

Step 3: Don't waste time – work out likely local offers

Providers must do a stock take of existing services against the TSA standards. This is part and parcel of preparing the annual report for the TSA and should

help to narrow down areas that may be suitable for local offers. What are tenants saying about your existing services? Do any of your surveys or reports point to services that need tailoring? Providers hold a good deal of information such as:

- satisfaction surveys
- findings from focus groups and tenant mystery shopping
- tenant profiling or segmentation
- feedback from tenant meetings
- analysis of complaints
- inspection reports
- benchmarking data
- consultants' reports

Key questions

Question	Answer with evidence	To do list
Have you analysed existing material about tenants' wishes and performance levels to identify the areas and services where your tenants are likely to want local offers?		
What local offers will you consult on and why? Do tenants agree you are homing in on the right things?		

A brief summary of the scope of the pilots' local offers is at appendix one.

The trailblazers had no problems at all using these to identify the locations and services where local offers might be needed. Usually, it was staring them in the face. Discussions with formal and informal groups of tenants and follow up surveys confirmed

they were looking at the right things. Concentrating on the areas and services that matter most to tenants saves time and money. Competent landlords either have all the material they need for this stage or know how to plug the gaps.

Step 4: Understand good, bad, and ugly services – set baselines for local offers

The best providers will understand how well they are doing on the TSA standards, identify areas that may be suitable for local offers and track progress against targets. The TSA asked local offers trailblazers to set baselines for current services then measure what difference the local offers made. As landlords have been gathering performance indicators and benchmarking for many years, it was surprising just how difficult this turned out to be.

In an ideal world, providers would set baselines against the standards for tenant involvement and empowerment, home and neighbourhood and community that:

- are accurate and reliable
- are straightforward to collect and to test progress against
- can be calculated for the place or group of tenants covered by a local offer
- make sense to tenants
- are like those used by other providers to make comparison easy
- help providers and tenants decide if services were value for money

The pitfalls that got in the way of this for the trailblazers were that:

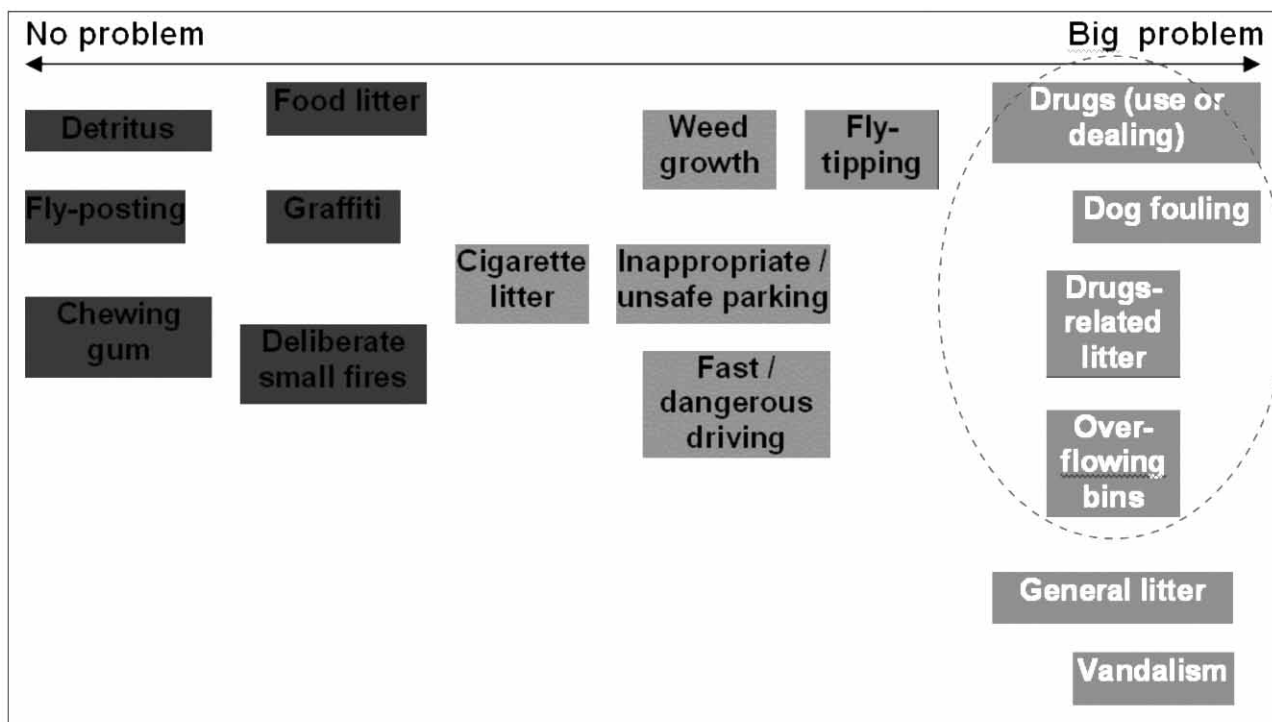
- associations and councils gathered different performance indicators in the past when they were regulated separately

- many of the performance indicators are in technical language (they say 'voids' instead of 'empty homes', and divide repairs into categories of urgency that are not immediately obvious to the layperson)
- sometimes factors beyond the landlord's direct control affect performance (satisfaction can be influenced by the age of residents)
- performance indicators were gathered at the level of a whole organisation – local offers can be for part of a provider's stock
- agreeing a baseline across several providers that may have used different ways of calculating indicators or cannot break these down to a particular location

When trailblazers wanted to deliver services in new ways they were successful at working out how to set baselines. Calico developed a new indicator for jobs done as promised alongside guarantees for repairs. It will continue to collect the old performance indicators on delivery against targets for emergency, urgent and routine to aid comparison with other landlords – though tenants have little interest in this data. The trailblazer led by Wherry in Norfolk used information from a baseline survey run by the Tidy Britain organisation of the things that tenants wanted changed – for example fewer speeding cars, less drug dealing and cleaner estates. Follow-up surveys will test progress.

The baseline for the Norfolk trailblazer is shown opposite. It illustrates tenant perception of problem areas to focus on. Later we set out the steps the providers are taking to deal with these. Interestingly, the same survey was done for the parts of the

Baseline views at the Norfolk trailblazer



village where owner-occupied housing prevails. Issues around drugs were much less common there. The goal of the trailblazer is to reduce these problems in the social housing areas so they move back in line with the rest of the village.

What was impressive was that in the end all the trailblazers did agree baseline measures and future targets, and examples are shown in step five here. The HouseMark publication How To Develop And Monitor Local Performance Indicators suggests the measures that should be gathered and reported on locally.

What should providers do to set a baseline?

There are plenty of performance indicators already for the standards where you must consider local offers, so use them.

- Tenant involvement and empowerment – data should be available on overall satisfaction and satisfaction with opportunities for involvement, which can often be broken down by age, ethnicity and location
- Home – providers usually hold data on Decent Homes compliance, SAP ratings, speed of response repairs and satisfaction with repairs. Repairs contractors supply data on costs, speed and reliability of works

Key questions

Question	Answer with evidence	To do list
Do you have a firm grasp of current performance levels on the standards for tenant involvement and empowerment, home and neighbourhood and community?		
Do you know what these services cost?		
Do you know how costs and performance levels compare with others?		
What services are most important to improve and where?		

- Neighbourhood and community – many providers gather data on satisfaction with area and there is widespread benchmarking on ASB. Trailblazers have data on communal cleaning, caretaking and grounds maintenance from service contracts

The TSA is to consult on overhauling how providers gather information on tenant satisfaction (the STATUS survey). This should make it easier to compare satisfaction in meaningful ways. A web portal comparing landlords has been launched by the TSA, with enhancements planned.

Although the baselines were not perfect and included a hybrid of old and new measures, all the trailblazers developed local offers that could be tested. The TSA will remain in contact with these trailblazers to report on progress.

The tips we would pass on are to:

- use existing indicators as far as possible to save time
- look before you leap – where new indicators are suggested allow some time for road testing
- concentrate on what can be done – don't magnify unimportant imperfections in data
- make sure you focus on value for money – tenants are really interested in this
- numerate and determined people can usually pull together a baseline from available material or work out how it can be pulled together quickly
- don't forget the basics – there is no point inventing fantastic new ways of calculating and cutting data if you are not on top of gas, fire and asbestos safety
- don't lose sight of the goal – tenants want clear indicators that make sense and help them hold landlords to account

Step 5: Don't re-invent the wheel – can you adapt trailblazer offers?

The trailblazers developed commitments, measures and targets for their own local offers. Some of these might be helpful for others as a starting point. Examples are shown below.

Tenant involvement and empowerment

The trailblazer in Hampshire, led by Sentinel Housing Association and involving landlords across the county and the Hampshire and District Residents' Forum, aims to involve tenants in comparing performance across the county and playing a more effective scrutiny role. The trailblazer's objectives, which it aims to achieve by April 2011, are to:

- improve the effectiveness of training and capacity-building of residents across Hampshire
- improve feedback and communication about involvement through a county-wide website and increased feedback
- increase the numbers of involved residents, particularly those from under-represented groups, so that services are better tailored
- improve staff's commitment to resident involvement throughout all of the organisations across Hampshire
- use resident involvement to improve repairs and improvements, ASB policies and community facilities
- increase opportunities for choice for residents

- make resident involvement better value for money
- increase residents' scrutiny at county level
- ensure the corporate/business planning process reflects residents' views and aspirations by increasing resident involvement in the process

These priorities were set by members of the forum and verified through a survey of 1,000 tenants across the landlords.

Home

In Calico's trailblazer, the standard for repairs includes:

Jobs done as promised¹

Response repairs that are completed in the number of visits originally specified and within agreed overall time limits. (The numerical targets are being calculated – these will be publicised to all tenants. The great majority of repairs will be done in one visit except those requiring diagnosis and measurement such as damp and condensation, structural defects and some replacement windows and doors.)

Repairs satisfaction

The percentage of tenants who are satisfied that the response repair is completed within the specified number of visits and to the specified standard (target is 95%).

Tenant statements

Provide tenants with regular repair statements to show how the provider has performed, to list repairs

¹ HQN discussion paper on right first time repairs looks at how the target can be set. The paper, Responsive Repairs – A First Time for Everything, can be found HQN's website at www.teamnet.org.uk

completed and also to identify repairs that are re-charges.

Repairs warranty

For the repairs operative to do the work to a standard, which means that the repair will last a given time period without further breakdown (subject to activity other than normal wear and tear) – the normal guarantee period will be six months.

Neighbourhood and community

The trailblazer led by Wherry in Norfolk has drawn up a cleaner, safer, greener charter setting out the responsibilities of local residents, the council, police and social housing providers in the village of Terrington St Clement. Commitments for housing providers include:

- we will maintain a high level of cleanliness on housing association land by carrying out regular estate inspections
- we will work with other agencies to remove bulky items and fly-tipping within five working days (unless a health and safety issue) and where possible take enforcement action

- we will respond within 24 hours to reports of serious ASB, domestic abuse and hate crime; otherwise we will contact you within five working days to discuss your report of ASB
- abandoned properties – we will investigate properties reported as abandoned and if required make secure within three working days to prevent vandalism and other crime
- graffiti – we will remove offensive graffiti from our land and property within 24 hours
- we will provide regular opportunities for you to let us know what is important to you and publish a You Said, We Did response
- we will provide a dedicated named officer for you and your home
- we will publicise the officer's email and direct dial numbers
- we will publicise quarterly multi-agency high-visibility inspections of areas covered by the charter
- undertake a new customer visit within 12 weeks of moving in and ensure you are familiar with the local standards
- hold meetings of the Terrington neighbourhood standards panel which is open to all residents

Key questions

Question	Answer with evidence	To do list
Have you considered whether any of the local offers and measures used by the trailblazers could help you?		

Overall the local offers:

- dealt with services that mattered to tenants
- were straightforward and mainly used existing and popular indicators (although these were applied across providers rather than separately in the Norfolk trailblazer)
- did not involve unnecessary or expensive new services

Where new indicators are being developed (as at Calico), they use language that makes sense to tenants and should not be onerous to collect.

Step 6: What, why, when, how, where, who – consult on detail of local offers

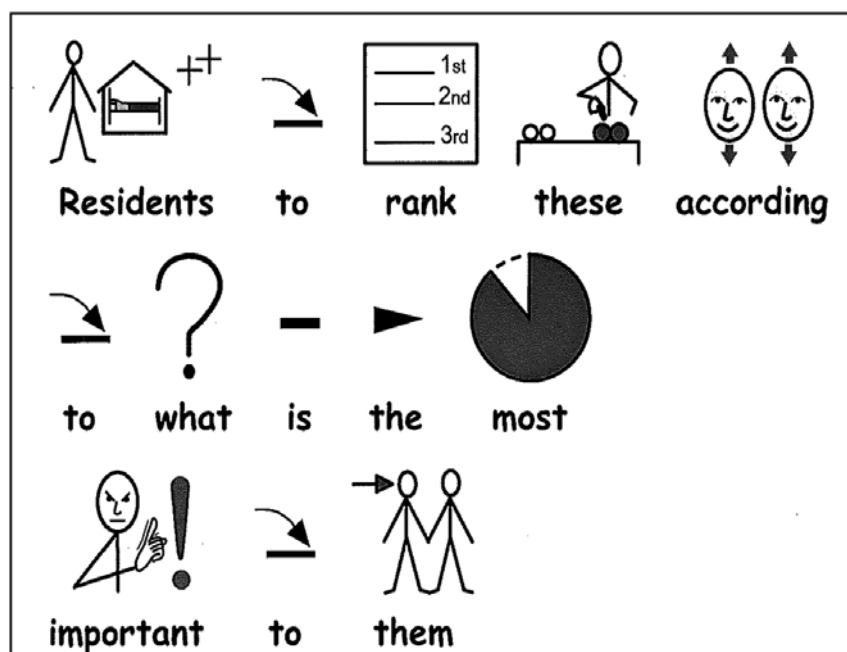
By this stage, providers should know broadly what tenants want from local offers. Surveys and other types of consultation point out what your tenants

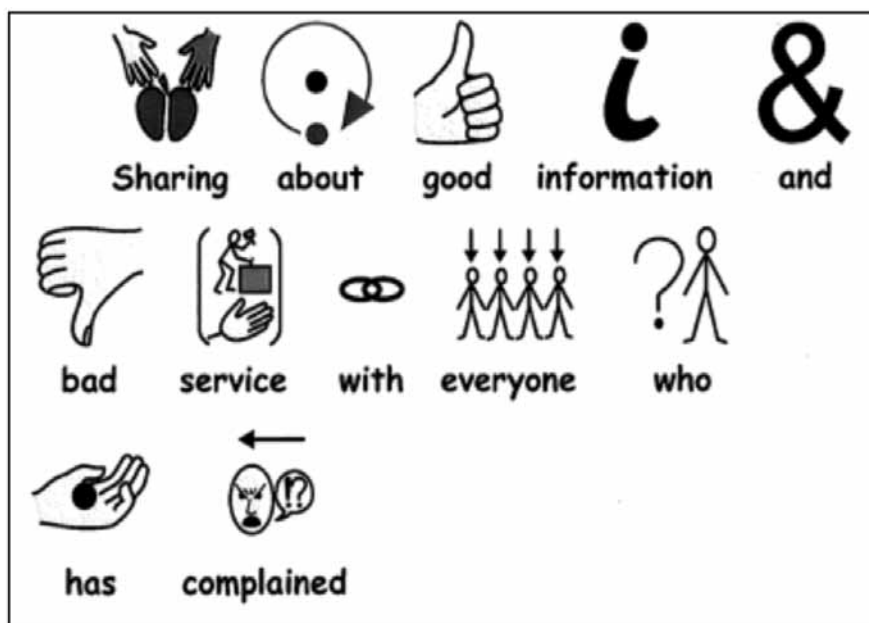
are concerned about. The offers made by the trailblazers give an idea of what is possible. It's time to get down to the detail.

What do the best providers do? They turn consultation and research into local offers that are cost-effective, deliverable, easy to understand and make a difference.

What are the pitfalls?

- Drowning under the weight of consultation
- Too much talk – too little delivery
- Badge engineering – a slight rebranding of existing services to pretend these are local offers
- Over-complication – a myriad of offers that no one understands, manages or notices
- Unaffordable promises that cannot realistically be delivered





What can we learn from the trailblazers?

process here looked like the image above and on page 15.

Getting beyond the traditional – effective consultation

This was a successful area for the trailblazers and all of the ideas are easily repeatable:

- various ways were found of appealing to young people – informal participative sessions, tagging consultation onto popular training courses, prize draws for iPods and the use of Twitter
- a local voluntary organisation in Oldham was used by Great Places to reach parts of the Asian community others could not reach
- residents with learning difficulties used pictorial questionnaires with help from support workers to rank priorities in the Matrix trailblazer. These signs are in common use by people with learning difficulties and therefore would be familiar. The

Turning talk into action – drawing out the offers after consultation

Midland Heart consulted with more than 700 tenants throughout Staffordshire on how they wanted management of their areas and estates to improve. The same concerns arose over and over again. Tenants wanted to feel safe in clean neighbourhoods. A booklet is being sent to all tenants explaining what they can now expect from their landlord. There are explicit standards on the number of days taken to remove of fly tipping and graffiti. Regular letters to tenants explain what is being done about anti-social behaviour.

At Wolverhampton, there are different targets depending on the estate and the concerns of tenants. But these take account of the capacity of

Key questions

Question	Answer with evidence	To do list
Is your consultation producing an agenda for action?		
Does the consultation lead directly to offers that are cost-effective?		
Are the local offers measurable?		
Will they make a difference to tenants' lives?		

the providers. The ALMO, which has 20,000-plus homes, promises to develop a self-service website and introduce CCTV. The smaller tenant management organisations are changing their opening hours and appointment slots to fit better around tenants. All these organisations are giving tenants what they want, but living within their means.

Step 7: Tell them about it – sign off and publicise local offers

The local offer should be signed off between the provider and a tenant body with clout. All tenants need to know the offer is there, what it includes and who to speak to if it is not delivered. Otherwise there is no accountability and, really, no local offer as such.

The trailblazers agreed local offer packages with representative tenant bodies that linked straight into governance structures including the board and scrutiny panels. These tenant bodies ranged from covering one estate or one landlord right up to a county-wide panel spanning around ten landlords.

Meetings, newsletters, personal letters, phone calls, texting, booklets, websites and notices in communal areas told tenants about the local offer. The level of detail varied across the trailblazers depending on the range and type of the offer.

Offers that covered services on one estate, area or landlord could be quite detailed, stipulating, for example, the frequency of grass cutting and speed of response on ASB. Offers on tenant involvement and empowerment were about inclusion and influence.

The Stockport offer says, “We will provide opportunities for you to influence decisions about the service through regular open days and focus groups.”

Tenants' groups should “aim to represent everyone in their community without exception”. Residents in temporary accommodation were included in the offer.

Key questions to check the local offers make a difference and stay fresh

Question	Answer with evidence	To do list
Has the local offer been agreed with a tenants' group that is credible and representative?		
What can this group do if the offer is not being delivered? Where are the links into the board or councillors? Do the board and councillors sit up and take notice?		
Do all tenants know about the offer? Do they think it is a good deal?		

The impact of this offer is tested through text surveys, regular meetings and phone calls. Black and ethnic minority customers are phoned directly four times a year to encourage their participation. You Said, We Did boards get displayed in communal areas of temporary accommodation and sheltered housing schemes. Stockport has also developed strong customer scrutiny procedures. As part of these arrangements, the board's performance sub-group must respond to suggestions and recommendations from the customer scrutiny panel. If the board fails to implement an agreed improvement, the customer scrutiny panel can serve a notice to act on the board requiring it to take remedial action.

The best providers:

- agree local offers with representative and credible tenant bodies that have clout
- communicate the local offer clearly and enthusiastically to all tenants

- ask tenants how well the offer is working
- stick to their promises and put things right quickly
- don't rest on their laurels – keep the offer up to date and relevant to tenants

The pitfalls include:

- setting an offer that is either too bland to be noticed or too complex to be delivered
- setting an offer that suits the landlord but makes no difference to the tenants
- watching the offer gathering dust like numerous other well-meaning initiatives

Step 8: Less conversation, more action – delivering offers

The local offers trailblazers produced SMART (smart, measurable, achievable, realistic, timely) action plans to deliver their offers. These show how consultation on the offer turns into better services

Key questions to check the local offers make a difference and stay fresh

What customers said	What customers want... our commitment to you	What we are aiming for: specific targets to achieve the commitments	The performance indicators/ measures we will use to measure how we are performing	How we will monitor performance – the activities involved
<ul style="list-style-type: none"> ▪ Older, disabled and vulnerable customers may need support when applying for housing and when moving into accommodation 	<ul style="list-style-type: none"> ▪ Allocations staff will be trained to identify support needs. They will be able to either provide support required or signpost customers to agencies and advocates that can help ▪ Customer information will be available about the full range of support available and how to access it 	<ul style="list-style-type: none"> ▪ Training completed by January 2011 ▪ Number signposted for support ▪ Information pack and web-based information to contain details 	<ul style="list-style-type: none"> ▪ Percentage take-up of support offered 	<ul style="list-style-type: none"> ▪ Survey of applicants ▪ Mystery shopping scenario ▪ Editorial panel role in development
<ul style="list-style-type: none"> ▪ Staff do not always provide a customer-focused response to enquiries; sometimes there is a lack of empathy 	<ul style="list-style-type: none"> ▪ Staff will be polite, helpful and provide a consistently high standard of service to all customers 	<ul style="list-style-type: none"> ▪ 93% satisfaction 	<ul style="list-style-type: none"> ▪ Percentage satisfied with how they are dealt with ▪ Percentage satisfied with how the enquiry is resolved 	<ul style="list-style-type: none"> ▪ Mystery shopping ▪ Feedback from surveys and complaints ▪ On-the-spot exit surveys ▪ Use Voxpod for customers to report their feedback ▪ Performance reporting

on the ground. Trailblazers will report to the TSA on progress in November.

A good example of an action plan comes from the allocations trailblazer at Halton. It links what customers said, to service improvements, actions and quality checks. Part of the Halton plan is shown on page 19.

While there is very reason to believe the local offer trailblazers will improve services it is not yet clear exactly how well they will do on value for money. We saw few targets for saving money and limited progress on joint procurement. In the Norfolk trailblazer, a united contract to improve the management of Terrington St Clement is being prepared. But at another joint trailblazer, collective procurement was put on hold, as a small association feared losing its identity under a wide uniform contract. At Hillingdon there is evidence that pooling staff and resources does save money across providers. Wherever landlords worked together,

tenants and staff asked why standards and costs varied. They need to find out why and take action to sharpen up.

The previous government's Total Place exercise looked at the savings that could be made where services are combined. At the Durham Total Place pilot the possible savings from using single teams across the 30+ landlords in the county to tackle ASB and deliver repairs were examined.² Existing maintenance contracts can limit the savings, improvements and tailoring local offers seek. Re-tendering under rules laid down by the European Union takes time and is expensive. Everyone expects the new government to push hard on value for money. So providers must prove they pull out all the stops to be cheaper and better.

The best providers:

- do what it says on the tin – they make clear local offers and are accountable

Key questions

Question	Answer with evidence	To do list
Do you have a SMART plan for delivering local offers?		
Does the SMART plan have firm targets for improving performance, increasing satisfaction and saving money? What are the main targets? How do these compare with other landlords?		

² HQN briefing paper – Total Place: Where Next?:

http://www.teamnet.org.uk/includes/get_file.php?filename=9049.pdf&permissions=0

- use SMART action plans to deliver on local offer promises to tenants
 - know that services are already value for money or have firm plans to save money by set dates
 - collaborate with others where it makes sense – they see the bigger picture
- Pitfalls include:
- inventing excuses not to work together when services could be improved and money saved
 - weak project management with no reality checks on progress
 - little direction on Value for money – difficulties in agreeing and understanding each others' data

Question	Answer with evidence	To do list
How do you know the plan is working well? What did the last progress report say?		
Did you consider the case for and against working on offers with other landlords? What drove the decision for or against collaboration? Was the decision taken on the facts or just for an easy life?		



Annual Repairs Statement

This is produced for residents as part of the Local Agreement. It gives a clear statement of repairs contractor performance for the period.

Estate: Palace Mews, Belgravia Road, London

Scheme number 0121

Target Budget £1,500

Actual Cost £965

Statement Period
01/04/2010 to
30/09/2010

Total number of repairs completed in the year at this estate.	20
Number of Post Inspections completed by Hanover staff	5
Number of Health & Safety Audits undertaken	2

Contractors Used	Trade	Number of repair Jobs completed in the year.	Number of jobs completed on time	Average Job Cost £ (Including vat)	Average Performance Score
Arthur Wrench	(gen. builder)	5	4	50	3
Ivor Leak	(plumber)	7	3	45	4
Buzz Lightyear	(electrician)	2	2	40	5
Turner Stopcock & Co	(plumber)	3	3	30	4
Tyler Slater	(roofer)	1	0	100	2
Ian Paine	(windows)	2	1	65	5
Out of hours contractors					
Jobs recharged to tenants					
Average score across Hanover by trade – for comparison against all other estates.		---			

Please see reverse for guidance notes relating to this statement

Step 9: You said, we did – reporting to tenants

At the best providers, the tenants know what is in the local offer and whether it is being delivered. The trailblazers used various ways of getting the message across: newsletters, personal letters and phone calls, text surveys, websites, meetings, Twitter and notices in communal areas.

Because the offers are local and tailored it was possible to report on progress for the area tenants lived in or the age group they belonged to. Like all of us, tenants are more interested in information they can relate to. They can also tell whether it is true. Good and simple examples include:

- repair statements to tenants at Hanover that showed the cost and quality of works to the scheme they live in
- in Thrive's trailblazer, notices in communal areas of the Boundary Way estate stipulating when

estate inspection takes place and when blocks will be cleaned with a picture showing the standard of cleanliness required

- peer reviews by residents and staff from other schemes to check compliance with standards on quality of accommodation, room allocation and staff approach at the supported housing provider Chapter 1

Many of the trailblazers promised annual reports showing how the things tenants said in consultation exercises have turned out. Tenants will be involved in designing and editing these. Several of the trailblazers talked about using peers as an impartial check on accuracy. Soon all providers will be going through this process.

The annual report to tenants for October 2010 must explain how you will go about setting local offers. Future annual reports will look at the impact. The TSA will produce a report showing the progress of the trailblazers this November, which assesses

Key questions

Question	Answer with evidence	To do list
Have we told the tenants how well we are doing on delivering local offers?		
Are our reports to tenants accurate and understandable?		
Are these in a format that will appeal to all tenants?		
Did tenants actually read the reports and find them useful? How do you know?		

how they dealt with local offers in their TSA annual report. Positive practice in reporting to tenants is demonstrated by SOHA, which was not one of the trailblazers but has developed a strong impact assessment process. It also produces a regular newsletter written by tenants for tenants, and tenants are very involved in producing the annual report.

The pitfalls to avoid include:

- jargon - reports full of technical terms that tell tenants nothing
- waffle - reports that do not tell the truth or avoid the issue, with no honesty about what has gone wrong and what is being done to sort it
- not known at this address - reports that tenants cannot relate to, covering areas and services the tenants have little interest in

Step 10: Putting things right and refreshing offers

At the best providers:

- the board or council is up to speed on performance against local offers
- there is decisive action from the top when rectification is required
- tenant bodies and scrutiny panels are also well aware of performance and know how to get the board or council to sort out any problems
- there are reliable systems in place to validate performance on local offers

- complaints are analysed and learned from – systems get changed to prevent any re-occurrence
- the attitude is right: they are always looking to improve local offers by learning from others and listening to their own tenants
- local offers make a difference: they drive up tenant satisfaction where the evidence shows they are needed – helping to avoid waste

Supermarkets are pioneers of local offers and demonstrate how effective they can be. In an interview for The Times, the chief executive of Sainsbury's, Justin King, said, "Those without data were being drawn into ever more promotions because they lack the sophisticated databases to tailor specific offers to particular customers." He believes that Sainsbury's loyalty card and tailored offers led to bigger sales growth and lower sales costs than rivals.

The local offer trailblazers linked the boards and councils with resident scrutiny panels that energetically sought feedback from tenants. The structures used at Bolton and Wolverhampton are shown in the June 2010 TSA report on local offers, *Going Local*.

Stockport Homes developed a framework for challenge and recourse with a new line of accountability between customers and the board:

- views of all customers are listened to including residents in temporary accommodation, older people, BME and those with disabilities

- these views feed into improvement plans developed by the customer scrutiny panel
- the executive team implements changes if these are quick wins or assesses viability
- the performance sub group of the board considers whether to implement the recommended improvements and if it does not
- the customer scrutiny panel can serve a notice to act on the board

There are plenty of examples of how the trailblazers have effectively learned from others both within and outside the social housing sector:

- at Hillingdon, other providers learned from how Look Ahead consults tenants with support needs and how A2 Dominion runs tenant mystery shopping
- Calico benchmarked aspects of its performance against Homeserve – an international provider of home repair services
- Wolverhampton asked tenants to grade their priorities for action by placing counters in jars

– just like Waitrose does when shoppers pick which charity to donate to

- in Norfolk, priorities for action were pinpointed using a Tidy Britain survey rather than the normal satisfaction surveys used in social housing. The ambition is to match satisfaction levels for those with local owner-occupied areas – not pockets of social housing miles away
- CCH drew up an accreditation framework for governance of co-ops based on best practice in the UK and Canada

Pitfalls to avoid include:

- fiddling while Rome burns – concentrating on building an empire rather than working tirelessly to satisfy existing customers
- box ticking – treating local offers as a one-off. Every time they are asked, tenants say they want to be treated with respect as individuals with choices. Sooner or later the tenants will twig if they are getting a raw deal

Key questions

Question	Answer with evidence	To do list
Does the board or council know if the local offer is being delivered?		
What do we do when it falls short?		
When was the last time the board or council discussed local offers? What happened next?		
What is being done to stop the offers going stale? Who do you benchmark against? Is it making a difference?		

To sum up

Self-assessment questions for board/managers/tenants

Once you have followed the steps in this toolkit and agreed your local offer, you need to be sure you have got it right. We set out below straightforward questions for boards, councillors, executives and managers to ask themselves, and a further set of questions for tenants.

The basic instructions are to:

- read and think about each statement
- look at the How Can You Tell column before responding
- rate your local offer out of ten
- share responses with others and discuss reasons for different scores, both for particular statements and overall
- discuss why ratings may differ between executives and non-executives and between professionals and tenants. Do frontline staff members see things differently from the leaders? Is there a reality gap?
- think about what needs to be done to improve the effectiveness of your local offers

Self-assessment tests for boards, councillors, executives, managers and staff

Does this sound like your local offer?	How can you tell?	How do you rate your local offer out of 10? (0 = poor and 10 = excellent)
All tenants know about our local offers	<ul style="list-style-type: none"> ▪ Newsletters ▪ Meetings ▪ Websites ▪ Surveys 	
Our local offers give tenants exactly what they want	<ul style="list-style-type: none"> ▪ Surveys ▪ Consultation ▪ Feedback ▪ Independent performance reports 	
Our local offers mark us out from the pack – they are better than local offers elsewhere	<ul style="list-style-type: none"> ▪ Benchmarking ▪ Feedback from regulators, partners, consultants and awards 	
We know how well we are delivering against local offers at all times	<ul style="list-style-type: none"> ▪ Board/committee reports ▪ Independent performance reports 	
Our offers are cost effective – the right balance of cost and service levels	<ul style="list-style-type: none"> ▪ Benchmarking ▪ Reports on value for money 	

When we fall short against local offer promises, we put it right fast	<ul style="list-style-type: none"> ▪ Analysis of complaints
We are always looking for new ways to improve our local offers	<ul style="list-style-type: none"> ▪ Committee/board reports ▪ Fact finding visits

Overall score

Self-assessment tests to check tenant views of local offers

These questions will need to be adapted to reflect the particular offer, and tenants who are not regularly involved with the landlord may need to be reminded what is in the local offer.

Does this sound like your local offer?	How can you tell?	How do you rate your local offer out of 10? (0 = poor and 10 = excellent)
All tenants know what is in the offer	<ul style="list-style-type: none"> ▪ You already knew personally what was in the offer before seeing these questions (you could have read about it in a newsletter or heard about it in a meeting) ▪ You have heard other tenants talking about the offer 	
The offer gives tenants what they want	<ul style="list-style-type: none"> ▪ It is of benefit to you and other tenants you know 	
The offer is better than tenants get from other landlords	<ul style="list-style-type: none"> ▪ What do tenants of other landlords tell you? ▪ Have you seen any information comparing your landlord's offer against others'? 	

You can rely on the local offers getting delivered

- It does what it says on the tin – anytime you use the service, the local offer gets delivered

The local offer is value for money

- You know what your landlord is doing to keep costs low and improve

When tenants complain about the local offer, it gets sorted fast

- Do you know about any problems with the offer?
- Were these sorted out quickly?

The local offer is getting better all the time

- You can see the service getting better

Overall score

Appendix one

Summary of the scope of the pilots' local offers

Quality of accommodation

Bristol Housing Partnership

The Bristol Housing Partnership, which takes in Bristol City Council, housing associations in the city and the Bristol HA Tenants' Network, agreed a local offer for delivering aids and adaptations across the city, including claims for Disabled Facilities Grant. The aim was to provide an efficient, customer-focused and cost-effective service, raising the services of all providers up to the level of the best performers.

Hastoe Housing Association

This pilot aimed to produce a standard on improving the energy efficiency of existing homes. Hastoe's subsidiary Sustainable Homes HA carried out the research and the organisation worked on the pilot with ALMO Six Town Housing.

Spire Homes

Spire Homes's pilot developed a local offer on the standards tenants can expect on moving into a new home. Its re-let standard features 12 promises, such as a decorating scheme, an incentive for tenants moving out to leave their home in good condition, random inspections by tenants of properties ready for re-let and clear information.

Tenant choice and customer service

Chapter 1

Chapter 1 tailored its local offer around the differing requirements of residents of five of its supported housing projects. The offers involve issues such as

staff communication and contact with residents, house rules and room allocations.

Derwent and Solway Housing Association

Derwent and Solway worked with Home Group and Impact and Westfield Housing Associations on this project taking in all housing association stock in the Workington area. The partners drew up new standards to improve customer service and choice for the tenants of all four associations.

Endeavour Housing Association

Endeavour focused its pilot on extending the involvement of its supported housing tenants in the delivery of its service and the scrutiny of its performance. Specific areas covered by the local offer include communication with tenants, repairs and maintenance and value for money. Tenants will have more access to training to develop their capacity.

London Borough of Lewisham

This project aimed to put in place a local safeguarding protocol for vulnerable tenants of different social landlords in the borough. A main driver for the pilot came from serious case reviews and the recognition that the vulnerable children and adults in such cases were unlikely to have a voice. The pilot had a clear focus on partnership working to build understanding and genuine benefits for tenants of different landlords.

Richmond Housing Partnership

This pilot was designed to improve customer satisfaction around home improvements. The local offer aims to extend choice in a number of areas,

including offering more opportunities for tenants to carry out their own improvements and providing 'on demand' services such as laying carpet, installing white goods or earlier kitchen or bathroom upgrades for residents who want to pay extra.

Wolverhampton Homes

This project involved Wolverhampton Homes and four tenant management organisations, and focused on responding better to the priorities of tenants at a local level. Each partner has agreed a local offer on areas ranging from repairs appointment times and the scheduling of minor works to providing recycling facilities and reviewing office opening times.

Your Homes Newcastle

Your Homes Newcastle's pilot targeted sheltered housing, offering improved choice and services in a number of areas including the applications process, moving in and repairs. There is also a strong focus on tailored support and tenant consultation.

Repairs and maintenance

Bemerton Villages

Islington-based tenant management organisation Bemerton Villages set out to develop a resident-led approach to its repairs service. The TMO has committed to involving tenants in monitoring and reviewing its repairs offer. A new code of practice aims to balance offering a high-quality service with the efficient use of resources.

Calico Housing

Calico's ambition with its pilot was to redesign its repairs service to reflect better the priorities of tenants. Its local offer gives tenants more choice over appointments and services and involves them in quality testing. Getting more repairs right first time is crucial to the offer and should offer greater value for money.

Hanover Housing Association

Hanover aims to tailor local agreements for estates, offering its residents more involvement in setting priorities and making choices about the work carried out. There will be minimum standards for all the schemes, but also local flexibility, for example on the contractors which are used.

London Borough of Croydon

Tenants have helped shape Croydon's work on its local offer. Among their priorities are more flexible appointments, repairs surgeries and maintenance days, where a number of repairs on an estate are done on one day.

West Kent Housing Association

West Kent's local offer also seeks to involve tenants more effectively in shaping the priorities for its repairs service. It has also focused on widening involvement from hard-to-reach groups, including those from black and ethnic minority communities and the settled Gipsy and Traveller population. Its offer features a number of commitments in areas such as 'right first time', communication and monitoring of performance.

Neighbourhood and estate management

Midland Heart

This pilot took in communities across Staffordshire. Midland Heart's local offer is based around three themes identified through its consultations with residents: clean neighbourhoods, safe neighbourhoods and maintenance of communal areas. The offer includes a number of pledges on how the organisation will address these issues and how its performance will be monitored.

Norfolk RSL Alliance

Taking in all the providers with stock in the village of Terrington St Clement, Norfolk, and led by Wherry Housing Association, this pilot developed a charter for neighbourhood management based on the priorities of local residents. The charter includes a series of pledges, on issues such as response times on anti-social behaviour, graffiti and fly-tipping.

Thrive Homes

Thrive worked with Watford Community Housing Trust on shared service standards for neighbourhood services. The standards cover issues including environmental nuisance, estate inspections, cleaning and gardening.

Town and Country Housing Group

Town and Country's pilot is focused on Sherwood, where it trained 25 residents to help shape its local offer. The offer sets out service standards residents can expect for cleaning and caretaking and grounds maintenance, and how residents and partner organisations will be involved.

Anti-social behaviour and security

Bolton at Home

ALMO Bolton at Home worked with six housing associations and the Bolton Community Homes Partnership, which brings together residents and housing providers across all tenures. The pilot developed service standards for the different organisations on dealing with incidents of anti-social behaviour.

East Midlands Housing Association

This pilot aimed to address anti-social behaviour and to provide more support for residents who make an ASB complaint. The association worked on the pilot with tenants on three estates in Leicester.

London Borough of Hounslow

The local offer in Hounslow focuses on a number of areas of concern to residents, including the quality of lighting on estates, security, drug and alcohol misuse and youth nuisance. It also aims to involve and communicate with residents better, through, for example, welcome packs, new tenant visits and regular tenant profiling.

Tenant empowerment

Accord Group

This project developed a framework to allow locally set standards to be evaluated and benchmarked, as well as a performance-grading system for delivering under the new regulatory regime.

Adactus Housing Group

Adactus decided to focus on understanding what 'local' meant to various tenants' groups by developing local standards across its stock in Manchester. It also looked at how performance would be monitored and how its tenant scrutiny arrangements would work under the new regulatory regime.

Confederation of Co-operative Housing

This pilot was designed to establish common standards nationwide for the governance of housing co-ops. The pilot team has developed an accreditation framework allowing co-ops to assess the way they work and then be externally validated and accredited.

Hillingdon Local Housing Partnership

Hillingdon Council, its ALMO and housing associations working in Hillingdon collaborated on this project to develop an involvement standard for the whole borough. The aim was to empower all social housing tenants with a collective voice to influence and scrutinise local strategic decisions and service delivery.

Home Group

Home's pilot looked specifically at tenant involvement and empowerment in its supported housing. Its local offer promises to allow tenants more say in a wide range of areas, from decisions about decorating the schemes where they live to involvement in the governance of the group.

Moat Housing

Moat's pilot was focused on its estates in Merton, where it developed a new resident-driven inspection regime. The inspections will result in estates getting a bronze, silver or gold rating for security, upkeep and cohesion. Estate 'champions' will play a key role in the process.

Northwards Housing

Northwards Housing in Manchester developed an approach to involve residents in its project delivery teams, which are responsible for managing and delivering the estate-based home improvement projects. It identified five estates with forthcoming development works and tested an approach to identify, train and involve residents in overseeing the works.

Sahil Housing

Sahil focused its pilot on working with the Somali community on the Chalk Hill estate in Brent, managed by Metropolitan Housing Trust, to ensure their voices were heard in the management of their homes. It carried out work within this hard-to-reach community to look at how their needs could be reflected in the delivery of housing services.

Sentinel Housing Association

This project involved housing associations and residents across Hampshire. It focused on improving tenant empowerment in the county through, for example, better training, communication and opportunities for more tenant choice and scrutiny.

Stockport Homes

The ALMO worked with Stockport Council and Stockport Tenants' Federation to develop a borough-wide empowerment standard. The aim is to boost tenant involvement in decision making and to improve tenant scrutiny through a 'quality panel' of residents checking performance. Its approach includes targeting particular client groups, such as residents with disabilities and those from black and minority ethnic communities, to ensure their views are heard.

Tristar Homes

Tristar developed a local empowerment standard and framework to cover all 10,500 homes it manages. Its offer is designed to ensure that tenants have the tools, training and capacity they need and that they are empowered to prioritise and monitor local service delivery and standards.

Allocations

Bromford Group and Homezone Living

The local offer here focused on the north Warwickshire and south Staffordshire area, and involves common service standards to provide greater choice, flexibility and mobility for vulnerable tenants and would-be tenants. The customer service promise developed by the pilot sets out exactly what people can expect as they go through the application process.

Great Places Housing Group

Great Places worked with Oldham MBC and Oldham Housing Investment Partnership on this pilot. It aimed to make the allocations process consistent and transparent and was particularly focused on reducing inequalities for more vulnerable applicants or those from black and minority ethnic communities.

Halton Housing Trust

This pilot was led by Halton, but included other social landlords in the area and was designed to establish a common standard for allocations alongside a new choice-based lettings scheme. Resident priorities were key in shaping the local offer.

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Local offers toolkit

The Tenant Services Authority's regulatory framework represents a dramatic shift in the way social housing providers are regulated. For the first time, all providers will need to meet the same national standards.

These national standards will be supplemented by local offers, agreed between landlords and their tenants on the issues that matter most on a local level. This toolkit is designed to help you get your local offers right.

TSA

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