**WHASP (Warrington Housing Association Scrutiny Panel) Service Review – Allocations**

**A report of a scrutiny review into the process of allocating tenancies to housing applicants.**

**Introduction**

Warrington Housing Association Scrutiny Panel (WHASP) agreed to complete two service area reviews this financial year. This is to allow the panel to scrutinize and review the processes of the chosen service areas and provide recommendations to the Audit and Risk Committee (ARC) and Senior Management Team (SMT) where improvements can be made to enhance and develop the customer journey.

WHASP had requested to focus our time on the Allocations process for this service review. This report will outline the overall scope of the review, the processes followed, how we carried out the review and the data collected.

WHASP has carried out several reviews of WHA (Warrington Housing Association) housing services to date, most recently these include voids, anti-social behaviour, and responsive repairs.

These reviews have produced several positive and constructive recommendations to ARC and WHA for improving services, many of which have been accepted and implemented.

**Scope of review**

The Scrutiny Group initially met October 2022 to determine the scope and develop a plan to carry out the review.

WHASP agreed the scope of the review would:

* Review and scrutinise the allocations for General Needs (GN) and Housing for Older People ( HfOP), the review in this instance will not include shared ownership or leaseholder.
* Scrutinise the customer satisfaction level of the allocations process
* Look at the customer journey from initial application through the allocation of a property
* Review the software used to allocate properties
* Scrutinise the interview process and interview questions
* Analyse how WHA manage customers’ expectations when applying for housing
* Review any performance information and/or results of surveys that are available.

WHASP will

* Prepare a report with any findings and recommendations, this will be presented to SMT and ARC
* Monitor the implementation of any recommendations because of the review.

WHASP decided to

* Create a survey to enable the scrutiny panel to obtain the opinions of customers who have been through the allocations process.
* Hold several sessions to contact a sample of customers to complete the survey
* Speak to the Customer Support Team who manage the waiting list and allocations process to gauge how the service works and the process that is in place
* Review the Allocations Policy and compare to other housing associations

**How the review was carried out**

To gain some knowledge into the Allocations process, we were provided with access to the following:

* Allocations Policy
* WHA Newsletters
* WHA website
* WHA colleagues
* Other organisation’s policies and processes around Allocations.

A meeting was set up with one of the Customer Support Team (CST) they explained the allocations process in its entirety to WHASP. During this meeting, we were shown how a customer applies to be on the housing waiting list, it was decided in October 2021 that all applications for GN and HfOP would be made online, to begin the process of becoming paper free.

The process of the customer journey began with WHASP navigating through the website, to find how and where to register for housing with WHA.

The application links directly into Home Master, therefore creating a person account as soon as the applicant submits the form. The application form allows the applicant to upload requested proofs at the time of submission, with a clear list of the proofs and documentation required being provided before the application is submitted.

WHASP were shown the process CST go through to make sure the application form has been completed correctly. For each application that is submitted, CST must check the applicant has provided the correct documents, that they have completed the application form correctly, including all contact details, correct personal details for each person on the application form along with applying for the right sized property.

HomeMaster contains a function whereby it can match a void property to the most suitable applicants, based on property size and length of time the applicant has been on the waiting list. WHASP wanted to know whether this was the sole way to search for suitable applicants, they were shown that a manual search can be completed too if required.

On matching applicants to a property, the three applicants who most closely fit the criteria will be interviewed. WHASP were provided with the interview questions to scrutinise and provide feedback on.

WHASP analysed the interview questions used by CST when applicants are matched to a property. The interview questions are in place so that CST can gain a better understanding of the applicant’s circumstances and assess between three applicants who would be better suited to the available property.

To enable WHASP to gain an understanding of customer thoughts and experience of the allocations process, we decided to use a sample of customers over a 12-month period who had been allocated a property with WHA from December 2021 through to December 2022. This was a sample of 120 new tenancies.

WHA has approximately 1300 properties, the sample used equates to around 9% of the overall stock. This data was collated by using our housing management system HomeMaster. This system is new to WHA, only going live in October 2020, during the Covid Pandemic.

The level of new tenancies started through this 12-month period is higher than the previous 12 month period by 2%

There are a number of reasons:

* WHA took ownership of the Edgewood Court development on Greystone Rd in Penketh, Warrington. This consists of 30 one and two bed apartments over 3 floors for customers over 55 years of age. WHA have been anticipating the building work to be finished so we could allocate the properties, but the building work was halted due to Covid19, so it took longer than originally planned. Although 30 properties are available, an agreement with the local authority means 50% of these would be offered to them as nominations.
* There was a higher turnover than usual of properties becoming void in the retirement living areas. This was at St Johns Court, The Mission and Lyon Court. This was due to factors such as customers moving out of town/area, moving in with family and sadly passing away.
* We had several transfers due to medical conditions and transfers from larger properties to smaller more suitable properties.

So, these factors increased the usual void properties that we then had to allocate.

Due to the void properties this year the sample is much larger than it would have usually been so doing a service review on this area this year with a bigger sample will hopefully provide a more diverse set of results.

**What ways were used to contact customers**

The Scrutiny Panel have used various ways of contacting customers in past reviews. In this instance we decided telephone calls would be the best contact method, so we arranged dates and to maximize responses we arranged three sessions to carry them out. Two sessions in the day during office hours and one session at 4-7pm used as a mop up session. Over the three sessions, WHASP were able to obtain feedback from 81 out of 120 customers, equating to 67% of the sample.

We created a short but concise questionnaire to carry out over the phone consisting of 5 questions. WHASP felt that the 5 questions would provide valuable feedback that we could quantify to demonstrate the findings.

**Evidence and Data**

\*\*under 6 months figure is due to the nature of allocation for Edgewood Court and turnover of void properties in Retirement Living Schemes

All 5 transfers have been on the waiting list for over 3 years and 2 from different housing providers.

**Quotes**

**Q1.**

‘I liked the fact that you manage your own waiting list’

‘I found the whole experience very personal, and this is very important

‘Speak Up Warrington helped me when applying’

**Q2.**

Website

‘Tricky to find things on the website’

**Q3.**

‘I did not read the policy’

‘I found the policy very understandable, and I felt I know where I stood’

**Q4.**

‘Could not believe how quick I got this property’

‘I was on the transfer list for 3 years’

‘I was waiting for over 2 years, but the staff did tell me it would be a while, so I thank them for their honesty’

**Q5.**

‘So impressed by the process from applying to getting my property’

‘I feel safe now that I have transferred to this property – thank you’

‘All the housing staff were lovely and helpful’

‘I was helped with my benefits too as well as getting a home’

Feedback

The scrutiny panel were very happy that we had such a large sample to get feedback from and felt due to this, this would achieve a wider range of customer views.

Some of our panel members commented that of all the customers that we spoke to they felt that WHA is held in high regard with a great reputation for providing good quality homes and being customer focused.

WHASP said that the 81 customers that we spoke to were happy to discuss their circumstances and provide feedback, there were many comments from customers saying it was nice to receive a phone call to ask for feedback.

**Recommendations**

Upon analyzing the data WHASP have suggested the following recommendations

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Reviewed by WHASP** | **Recommended** | **Date Reviewed by WHA** | **Accepted/Not Accepted Implementation** | **When** |
| Looking for a home section on the WHA website | * WHASP felt that the positioning of the Allocations Policy at the bottom of the page on applying for a home page is not very noticeable and would recommend it be highlighted or made larger so customers will see it. * WHASP believe it would be beneficial for a copy of the allocations policy to be sent out to the applicants. * WHASP believe the ‘How to apply’ section should be more user friendly; a flow chart of what to do may help and a section of FAQs for prospective customers. * WHASP recommend that the retirement living images and information is changed as it is out of date. * WHASP recommend that the website requires attention, there is a lot of out-of-date information, and the search function is not user-friendly. | * 02/02/2023 | **Accepted**- refer to corporate services to review and amend as part of website review.  **Not Accepted**-Accepted-any benefit to being sent the policy. Link in with point below and have link in email to FAQs and policy  **Accepted**  **Accepted-**some changes have been made. Further changes to be reviewed in the website review. Photos of hard to let properties to be taken of inside and advertised on social media/website  **Accepted** | Ongoing  Q1/Q2  Ongoing  Ongoing |
| Pre-Tenancy Interview Questions | * WHASP reviewed the interview questions and found them to be quite intrusive. WHASP recommend that the interview questions be reviewed by the Head of Customer Service and Customer Experience Manager, with the possibility of comparing the questions WHA use to other associations. |  | **Accepted**- HOS and CEM to review questions alongside pre-tenancy review. | Q1 |
| Customer Service information sharing with customers | * WHASP found that a small number of customers had to ring up to find out if their application had been processed as they had not had a response from customer service -   WHASP would recommend that this information is cascaded to colleagues and for an email/letter to be provided to the applicant to confirm when an application has been approved. |  | **Accepted**- CEM has implemented an email and letter response already. Customer is provided with confirmation of acceptance onto register and application reference number | Completed |
| Allocation of Property | * WHASP feel that the entire process of allocations needs to include the patch housing officer * At present, CST manages the waiting list, interviews the prospective tenants, and chooses the most suitable applicant. * WHASP recommend that the housing officers are involved in the decision of which applicant will be offered the property, as they will be managing the tenancies. |  | **Accepted**- HOS will look at reviewing the pre-tenancy process and where involvement with CST and HOS should be. Including reviewing the interview questions and whether there is a requirement for an interview to take place. | Q1/Q2 |