Measuring the Scottish Social Housing Charter Outcomes

July 2013

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Introduction

The Scottish social housing sector is undergoing significant change in the policy and operating environment in which it works. Key amongst many challenges are: the implementation of the Social Housing Charter (the Charter), restrained resources and the impact of welfare reform on revenue collection and other landlord functions.

Many of these changes have required and will continue to require landlords to make fundamental changes in the way they work. However, effective change of any sort requires a thorough understanding of the current position, and what effect the potential impact of change will have on tenants, partners and on business and financial viability.

This toolkit seeks to provide initial advice to councils and housing associations on how to respond to the challenge of evidencing compliance with Charter outcomes through a process of self-assessment which involves tenants.

For each year ending on 31 March, starting with the year 2013-2014, social landlords will need to report the assessment of their progress towards or achievement of the Charter to their tenants and others who use their services. This should be done by the end of the following October, as well as submitting an Annual Return on the Charter (ARC) to the Scottish Housing Regulator (SHR),

The SHR's Regulatory Framework states that there are some basic requirements which social landlords must achieve in their reports. A landlord's report must include:

- An assessment of its performance in delivering each of the Charter's outcomes and standards which are relevant to the landlord

- Relevant comparisons: these should, through time, include comparisons with previous years, with other landlords and with national performance

- A statement on how the landlord intends to address areas for improvement.

In addition, the reports should be accessible to tenants and other stakeholders, and should be in plain jargon free language.

CIH Scotland, SHBVN, ALACHO and HouseMark Scotland have worked together to produce this updated toolkit in the belief that it is unlikely that the Regulator's Charter measures alone will be sufficient for self-assessment purposes in terms of evidencing overall compliance with Charter outcomes. Landlords will therefore need to:

- Develop their own suite of measures in order to self-assess compliance with Charter expectations

- Develop tenant involvement in the self-assessment process, in itself, a significant endeavour, that needs to commence as soon as possible, if you have not started this already

- Have a dialogue with tenants and others to identify what and how they want to focus on in the annual report to tenants.

This 'Charter toolkit' is to aid social landlords in their thinking on self-assessment in relation to the Charter. It sets out where existing internal, public documents and benchmarking may fit in relation to the Charter outcomes.

Self-assessment

As we have noted, self-assessment by landlords is a key Charter expectation.

Self-assessment is the process through which an organisation becomes aware of, and understands the reasons for, the effectiveness and efficiency of its performance in all areas of activity, and determines what improvements are required.

For social landlords, it includes an examination of the resulting outcomes for tenants and satisfaction with the services received and the value for money (VFM) they offer to tenants.

The process should result in a comprehensive and honest picture of the organisation's current and future health, which can be used (amongst other things) to drive business planning, service development, VFM and to produce and implement improvement plans.

Self-assessment is usually undertaken by officers, with input from tenants, and is often more robust if some external challenge and validation is included. This can be in the form of tenant feedback, mystery shopping and/or tenant inspection; peer review; external accreditation, stakeholder or partner perspectives; the involvement of external consultants.

Ultimately, however, it is governing bodies[1] that carry the responsibility for an organisation's performance. Their leadership is essential in directing the process, and in challenging and signing off the self-assessment as part of the business planning cycle.

Why self-assess?

There are three primary reasons for undertaking self-assessment:

- To inform effective business planning

- To meet regulatory requirements and be accountable to tenants

- To inform service development, remodelling and improvement

Self-assessment normally has three key facets:

- Internal self-assessment

- External comparison with peers

- Trend analysis (comparison with previous years)

Internal self-assessment

This is the most important element to be considered, as without it the other two facets cannot be properly examined. A landlord needs to evaluate its performance against:

- Legal and regulatory requirements (including the Charter outcomes/standards)

- The corporate objectives and priorities set out in its business plan/HRA business plan, including performance targets

- Its service to tenants and service standards

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[1] Housing association boards, council cabinets and housing committees

- The promises in its offer document (for stock transfer organisations)

- Local authority housing strategies / housing association business plans

External comparison

This would normally be critical to gaining a perspective on internal performance. Without external comparison, a landlord will be unaware of what else is possible beyond its own performance and cost, and will be less able to identify areas where it needs to improve, and where it already excels.

Comparison with others aids an understanding of the VFM and effectiveness of services; these are important considerations for tenants and other stakeholders. Indeed, it may be impossible to evidence VFM without relevant comparisons with other landlords. Comparison also pinpoints good practice, and can therefore avoid duplication of effort.

Trend analysis

This is essential to understand the organisation's 'direction of travel' in key areas of business performance and cost. Are they improving over time?

Trend analysis helps landlords to understand where decisions taken have been good ones and resulted in the expected outcomes, and where this has not happened. This learning can then inform future decision-making.

A comprehensive picture of the current position should emerge, which is then challenged in terms of meeting Charter outcome expectations and from which improvement action plans are derived.

Involving tenants in self-assessment

Seeking to embed a customer focus in the way social landlords prioritise investment, shape services and make decisions is not a new concept. Increasingly, the better performing landlords are seeing this kind of approach as good business sense – a way to differentiate their services from those of other providers by ensuring resources are focused on the right things and that the services they provide are what tenants want.

This approach is generally referred to as 'tenant scrutiny' across the UK. Much of current thinking on tenant scrutiny stems from the ground-breaking CIH publications on the subject.

Key to CIH guidance is the concept of the role of a landlord-wide Tenant Panel, which serves as a hub for the landlord's various tenant involvement initiatives, and as the formal body that holds the landlord to account.

The CIH briefing *Leading the way: achieving resident-driven accountability and excelle*nce[2] is particularly helpful in exploring this model of tenant scrutiny and challenge.

Tenant scrutiny is now being actively promoted by the Scottish Government[3] and the Scottish Housing Regulator and forms a key element of the Charter requirements.

Indeed, one of the stated purposes of the Charter is to improve the quality and value of the services that social landlords deliver for their tenants. The Scottish Government expects that the Charter will do so in the following ways:

- By providing tenants and other customers with a clear statement of what they can expect from social landlords, and helping them to hold landlords to account

- By focusing the efforts of social landlords on achieving outcomes that matter to their tenants and other customers

- By providing the basis for the Scottish Housing Regulator to assess and report on how well landlords are performing

As we have noted earlier, self-assessment of performance against Charter outcomes is now to be undertaken by providers on an annual basis and tenants are expected to be involved in the self-assessment process itself.

CIH Scotland, SHBVN, ALACHO and HouseMark Scotland believe that the process of defining and measuring Charter outcomes cannot be effective without equal thinking on how to involve tenants in this process and how to explain data in a comprehensible manner.

This topic is explored fully in the guide *How to develop and monitor local performance measures: A guide for tenants and landlords[4]* jointly published by HouseMark and the Tenant Services Authority. The key findings of this report are particularly relevant to Scotland at this time and are summarised in Appendix 2.

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[2] http://www.cih.co.uk/resources/PDF/Policy%20free%20download%20pdfs/Leading%20The%20Way.pdf
http://www.housemark.co.uk/hmresour.nsf/lookup/PIGuide.pdf/$File/PIGuide.pdf
[3] The Scottish Government has commissioned CIH Scotland, in partnership with HouseMark Scotland, to develop and deliver a three year scrutiny training and learning programme, aimed at developing effective scrutiny arrangements. The 'Stepping up to Scrutiny' programme is designed to improve housing organisations' understanding of the scrutiny intentions of the Scottish Social Housing Charter and related regulatory framework.
[4] http://www.housemark.co.uk/hmresour.nsf/lookup/PIGuide.pdf/$File/PIGuide.pdf

Charter outcomes – sources of evidence

In this, the main section of the toolkit, we list the wide range of evidence sources that landlords should consider using to demonstrate achievement of Charter outcomes. The columns on the right highlight existing indicators of performance, satisfaction and cost. Below the outcomes is a list of other types of evidence sources that are commonly produced by social landlords in Scotland.

It is worth noting that some suggestions, particularly the national indicators[5], would not provide a complete picture, but are included as they provide partial evidence and help as part of a basket of indicators for the evidence required. The Technical Guidance[6] published by the Regulator gives fuller information on the data that should be supplied for the ARC. Some specific contextual information is also included in this toolkit as they are also relevant to the Charter outcomes.

A short note about the specific benchmarking indicators used by HouseMark Scotland can be found at Appendix 1.

The Scottish Housing Regulator has published two documents to support landlords with tenant surveys, 'Conducting surveys of tenants and service users - a guide'[7] and 'Tenant and Service User Satisfaction Indicators'[8].

HouseMark Scotland has teamed up with SHBVN produce STAR in Scotland[9] which combines the regulatory requirements under the Scottish Social Housing Charter[10] with STAR's established framework for comparing satisfaction. Landlords who follow STAR in Scotland will not only obtain satisfaction results suitable for submission to the SHR, but will also be able to compare themselves with their peers in Scotland and the rest of the UK.

Feedback from satisfaction surveys, and from complaints are obvious indicators for almost all outcomes, so under each outcome we have not repeatedly mentioned these sources of information.

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[5] http://www.scottishhousingregulator.gov.uk/sites/default/files/publications/Charter%20Indicators%20Document%20-%20Final%20Draft%20-%2027%20September_0.pdf
[6] http://www.scottishhousingregulator.gov.uk/sites/default/files/publications/Revised%20tech%20guidance_0.pdf
[7] http://www.scottishhousingregulator.gov.uk/sites/default/files/publications/FINAL%20Ipsos%20MORI%20Guide%2008%20March%202013%20As%20Published.pdf
[8] http://www.scottishhousingregulator.gov.uk/sites/default/files/publications/All%20Satisfaction%20Indicators%20010213.pdf
[9] http://www.housemark.co.uk/hm.nsf/all/STAR+in+Scotland?opendocument
[10] http://www.scottishhousingregulator.gov.uk/news/scottish-housing-regulator-publishes-revised-tenant-and-service-user-satisfaction-indicators

The Customer Landlord relationship		
Outcome 1 – Equalities	**National**	**Benchmarking**
Social landlords perform all aspects of their housing services so that: • *every tenant and other customer has their individual needs recognised, is treated fairly and with respect, and receives fair access to housing and housing services.* This outcome describes what social landlords, by complying with equalities legislation, should achieve for all tenants and other customers regardless of age, disability, gender reassignment, marriage and civil partnership, race, religion or belief, sex, or sexual orientation. It includes landlords' responsibility for finding ways of understanding the needs of different customers and delivering services that recognise and meet these needs.	**SHR ARC** Indicator 2 **Scot Govt SCORE** Household Characteristics Ethnic Origin Part A, Q1, Q2 **Scot Govt HL1** Household Characteristics	**SHBVN** Core RSL CSMT Results **HouseMark Scotland:** Core **STAR in Scotland** Demographics Core Other Charter General Services
Strategy		
• Local Housing Strategy		
• Equalities Strategy or Statement		
• Tenant Participation Strategy		
Policy		
• Allocations		
• Tenant Participation		
Public Information		
• Strategy or policy leaflets		
Performance Reports		
• Complaints handling performance and analysis reports		
• Customer satisfaction results on complaint handling		
General Evidence		
• Customer Survey Results by equalities groups		
• Equality Impact Assessments + office compliance with 'DDA'		
• Housing Need & Demand Assessment		
• Survey of Tenants and Residents in Scotland (STAR in Scotland)		

Outcome 1 – Equalities (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
CORE	Applications & Allocations	% of applications from BME Groups
Equalities	Applications & Allocations	% allocations to BME Groups
	Applications & Allocations	% staff from BME Groups
	Applications & Allocations	Number of homeless applications from BME groups
	Applications & Allocations	% applicants from BME groups
	Applications & Allocations	Number of homeless BME applicants housed by LA, RSL or PRS
	Applications & Allocations	% homeless BME applicants housed in tenancy
	Applications & Allocations	% all applicants housed in tenancy
RSL	Applications & Allocations	Number on Housing Register
Equalities	Applications & Allocations	Number of BME Applicants
	Applications & Allocations	% of BME applicants
	Applications & Allocations	Total Number of Lets
	Applications & Allocations	Number of Lets to BME applicants
	Applications & Allocations	% of LETS to applicants from BME
	Applications & Allocations	Number of offers made to BME applicants

Outcome 1 – Equalities (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Equalities and diversity	Diversity information held (%)

Secondary

Service	Reference	Title
Core	Equalities and diversity	Equalities Standard - level reached
Core	Equalities and diversity	Diversity information - Religion or belief %
Core	Equalities and diversity	Diversity information - Sexuality %
Core	Equalities and diversity	Diversity information - Disability %
Core	Equalities and diversity	Diversity information - Ethnicity %
Core	Equalities and diversity	Diversity information - Gender %
Core	Equalities and diversity	Diversity information - Age %
Core	Customer service	Customer Service Excellence Standard - level reached

Outcome 1 – Equalities (cont.)

STAR in Scotland benchmarking measures[11]

Service	Reference	Title
STAR in Scotland	Core Questions	CorS1 - Taking everything into account, how satisfied or dissatisfied are you with the service provided by [your landlord / landlord name]?
STAR in Scotland	Core Questions	CorS2 - Overall, how satisfied or dissatisfied are you with the quality of your home?
STAR in Scotland	Core Questions	CorS3a – Overall how satisfied are you with: your neighbourhood as a place to live?
STAR in Scotland	Core Questions	CorS3b – Overall how satisfied are you with: [your landlord / landlord name]'s management of the neighbourhood you live in?
STAR in Scotland	Core Questions	CorS4 - Taking into account the accommodation and the services [your landlord / landlord name] provides, do you think the rent for this property represents good or poor value for money?
STAR in Scotland	Core Questions	CorS5 - How satisfied are you with opportunities given to you to participate in [your landlord / landlord name]'s decision making process?
STAR in Scotland	Core Questions	CorS6 - Generally, how satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with repairs and maintenance?
STAR in Scotland	Core Questions	CorS7 - How satisfied or dissatisfied are you that [your landlord / landlord name] listens to your views and acts upon them?
STAR in Scotland	General Services	Gen4 - How satisfied or dissatisfied are you that [your landlord / landlord name] treats you fairly?
STAR in Scotland	Other Charter Questions	CI16(A) and CI16(B) - Have you had any repairs carried out in this property in the last 12 months? Thinking about the LAST time you had repairs carried out, how satisfied or dissatisfied were you with the repairs service provided by [your landlord / landlord name]?
STAR in Scotland	Other Charter Questions	CI9(A) - Did you move into the property in the last year, that is since [month/year]?

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[11] Star in Scotland is a HouseMark and SHBVN collaborative benchmarking tool developed specifically for the Scottish social landlords
http://www.housemark.co.uk/hm.nsf/all/STAR+in+Scotland?opendocument

STAR in Scotland	Other Charter Questions	CI9(B) - Thinking about when you moved in, how satisfied or dissatisfied were you with the standard of your home?
STAR in Scotland	Other Charter Questions	CI33 - Taking everything into account, how satisfied or dissatisfied are you with the factoring services provided by [your landlord / landlord name]?
STAR in Scotland	Other Charter Questions	CI28 - How satisfied or dissatisfied were you with the overall quality of the temporary or emergency accommodation you were provided?
STAR in Scotland	Other Charter Questions	CI37 - How satisfied or dissatisfied are you with [your landlord / landlord name]'s management of your site?
STAR in Scotland	Demographics	DemS1 - You and your household - please tell us the age last birthday and gender of everyone who lives with you in your household
STAR in Scotland	Demographics	DemS2a, DemS2b - Do you have a physical or mental health condition or illness lasting or expected to last 12 months or more? Does your condition or illness reduce your ability to carry out day-to-day activities?
STAR in Scotland	Demographics	DemS3 - Does your household currently receive housing benefit (either paid directly to you or to your landlord)?
STAR in Scotland	Demographics	DemS4 - Which of the following options best describes how you think of yourself? Heterosexual / Straight Gay / Lesbian Bisexual Other Prefer not to say
STAR in Scotland	Demographics	DemS5 - What is your (and your partner's) ethnic group?
STAR in Scotland	Demographics	Dem6 - What religion, religious denomination or body do you belong to?

Outcome 2 - Communication	National	Benchmarking
Social landlords manage their businesses so that: • *tenants and other customers find it easy to communicate with their landlord and get the information they need about their landlord, how and why it makes decisions and the services that the landlord provides.* This outcome covers all aspects of landlords' communication with tenants and other customers. It is not just about how clearly and effectively a landlord gives information to those who want it. It also covers making it easy for tenants and other customers to make complaints and provide feedback on services, using that information to improve services and performance, and letting people know what they have done in response to complaints and feedback. It does not require landlords to provide legally protected, personal or commercial information.	**SHR ARC** Indicator 3, 4 and 5	**SHBVN :** Core RSL CSMT **HouseMark:** Core Complaints Resident Involvement Benchmarking **STAR in Scotland:** Core Other Charter General Services
Strategy		
• Tenant Participation + Customer Strategy		
• Customer Satisfaction Measurement		
Policy		
• Complaints		
• Evidence of compliance with SPSO model policy		
Public Information		
• Complaints Policy Leaflet		
Performance Reports		
• Complaints Handling Performance & Analysis		
• Service Improvement Plan Updates to evidence customer feedback to inform/improve services		
• Customer satisfaction survey results		
General Evidence		
• Tenant views on ease of communication – standard survey question(s)		
• Tenants Newsletter		
• Website content		

• Complaints Accreditation		
• Communications Awards (i.e. Customer Excellence)		

Outcome 2 – Communication (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
CORE	Complaints	Complaints open at 1 April
	Complaints	New complaints received during year
	Complaints	Complaints answered during the year
	Complaints	Complaints open at 31 March
	Complaints	Of which, subject to further complaint
	Complaints	Number of complaints per 1,000 tenancies
	Customer satisfaction levels	% Level of satisfaction with overall service in last 3 yrs
	Customer satisfaction levels	% tenant satisfaction with void standard
	Customer satisfaction levels	% customer satisfaction with repairs service
	Customer satisfaction levels	% tenant satisfaction with allocations process
	Customer satisfaction levels	% satisfaction with temporary accommodation standard
	Customer satisfaction levels	% customer satisfied with ASB complaint handling
RSL	Complaints	Complaints open at 1 April
	Complaints	New complaints received in year
	Complaints	Complaints answered during the year
	Complaints	Complaints open at 31 March
	Complaints	Number of complaints per 1000 tenancies
	Complaints	Of complaints closed, how many were resolved at first stage?

	Complaints	Of complaints closed, how many were resolved at later stages?
	Customer Satisfaction levels	% tenant satisfaction with void property standard
	Customer satisfaction levels	% tenant satisfaction with day to day repairs
	Customer satisfaction levels	% satisfaction with overall service

Outcome 2 – Communication (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Housing Management	Total cost per property resident Involvement
Core	Housing Management	Service delivery boards - members who are residents %
Complaints	Complaints	Average time in calendar days to issue full response to all Stage 1 complaints

Secondary

Service	Reference	Title
RIB	Resident involvement	Direct non-pay cost per property of communication
RIB	Resident involvement	Direct non-pay cost per property of main newsletter
RIB	Resident involvement	Direct non-pay cost per property of local newsletter
RIB	Resident involvement	Direct non-pay cost per property of conferences
RIB	Resident involvement	Direct non-pay cost per property of road shows etc.
RIB	Resident involvement	Direct non-pay cost per property of texting/voting
RIB	Resident involvement	Direct non-pay cost per property of e-forums
RIB	Resident involvement	Residents who respond to surveys and other consultation exercises as a % of surveys etc. sent out
RIB	Resident involvement	Number of services changed, implemented or withdrawn during the year as a result of resident involvement
Core	Customer service	Complaints - % satisfied with complaint handling
Core	Customer service	Percentage of Stage 1 complaints upheld

Core	Customer service	Complaints - % satisfied with the outcome of the complaint
Complaints	Complaints	Number of services changed, improved, withdrawn resulting from complaints
Complaints	Complaints	Total no. compliments per '000 stock

Outcome 2 – Communication (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Core Questions	CorS7 - How satisfied or dissatisfied are you that [your landlord / landlord name] listens to your views and acts upon them?
STAR in Scotland	General Services	Gen2 - How satisfied or dissatisfied are you that [your landlord / landlord name] gives you the opportunity to make your views known?
STAR in Scotland	General Services and Other Charter Questions	Gen3 - How good or poor do you feel [your landlord / landlord name] is at keeping you informed about things that might affect you as a resident?
STAR in Scotland	General Services	Gen6b and 6c- How satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with the following? Complaints Your enquires generally
STAR in Scotland	General Services	Gen8 - Are you aware of how to challenge [your landlord / landlord name]'s published service standards?

Outcome 3 - Participation	National	Benchmarking
Social landlords manage their businesses so that: • *tenants and other customers find it easy to participate in and influence their landlord's decisions at a level they feel comfortable with.* This outcome describes what landlords should achieve by meeting their statutory duties on tenant participation. It covers how social landlords gather and take account of the views and priorities of their tenants; how they shape their services to reflect these views; and how they help tenants and other customers to become more capable of involvement.	**SHR ARC** Indicator 6	**SHBVN:** Core CSMT **HouseMark Scotland:** Core Resident Involvement Benchmarking **STAR in Scotland:** Core Other Charter General Services
Strategy		
• Tenant Participation		
Policy		
• Tenant Participation Policy or Action Plan		
Public Information		
• Leaflets on Getting Involved		
Performance Reports		
• Tenant Participation action plan and progress report		
• Benchmarking reports		
General Evidence		
• Standard survey question on ease of participation opportunities		
• Data on number of responses and how they influenced decisions		
• Minutes from meetings with tenants/representative groups		
• Quality Assured Scrutiny Accreditation (CIH and HouseMark)		
• Capacity building opportunities for customers/tenants		
• TPAS Scotland Accreditation		
• TIS Tenant Participation Health Check		
• Tenant involvement awards		
• Survey of Tenants and Residents in Scotland (STAR in Scotland)		

Outcome 3 – Participation (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
CORE	Tenant participation	TP budget spend per tenant per year
		% overall TP budget given to tenants groups
		% tenants groups that are RTOs

Outcome 3 – Participation (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Housing Management	Total cost per property resident Involvement
Core	Resident involvement	Percentage of resident board members
Core	Resident involvement	Satisfaction - % satisfied with opportunities for participation

Secondary

Service	Reference	Title
Core	Resident involvement	Number of tenant groups that are registered (RTOs)
RIB	Resident involvement	% of staff who have received some training in resident involvement provided or part funded by the organisation
RIB	Resident involvement	Residents who have received some training provided or part funded by the organisation as a % of properties managed
RIB	Resident involvement	% residents who are satisfied with learning outcomes of training when asked 6 months after the training
RIB	Resident involvement	Direct non-pay cost per property of resident training

RIB	Resident involvement	Direct non-pay cost per property of formal groups
RIB	Resident involvement	Direct non-pay cost per property of informal groups
RIB	Resident involvement	Direct non-pay cost per property of resident board membership
RIB	Resident involvement	Direct non-pay cost per property of grants to groups

Outcome 3 – Participation (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Core Questions	CorS7 - How satisfied or dissatisfied are you that [your landlord / landlord name] listens to your views and acts upon them?
STAR in Scotland	Core Questions	CorS5 - How satisfied are you with opportunities given to you to participate in [your landlord / landlord name]'s decision making process?
STAR in Scotland	General Services and Other Charter Questions	C13 and Gen3 - How good or poor do you feel [your landlord / landlord name] is at keeping you informed about: their services and decisions? things that might affect you as a resident?
STAR in Scotland	General Services	Gen2 - How satisfied or dissatisfied are you that [your landlord / landlord name] gives you the opportunity to make your views known?
STAR in Scotland	General Services	Gen4 - How satisfied or dissatisfied are you that [your landlord / landlord name] treats you fairly?
STAR in Scotland	General Services	Gen5 - How likely would you be to recommend [your landlord / landlord name] to family or friends on a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely?
STAR in Scotland	General Services	Gen6, 6a – 6d - How satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with the following? Anti-social behaviour Complaints Your enquires generally Moving or swapping your home (transfers and exchanges)
STAR in Scotland	General Services	Gen7 - Are you aware of [your landlord / landlord name]'s published service standards?
STAR in Scotland	General Services	Gen8 - Are you aware of how to challenge [your landlord / landlord name]'s published service standards?

Outcome 4 - Quality of Housing	National	Benchmarking
Social landlords manage their businesses so that: • *tenants' homes, as a minimum, meet the Scottish Housing Quality Standard (SHQS) by April 2015, and continue to meet it thereafter, and when they are allocated, are always clean, tidy and in a good state of repair.* This standard describes what landlords should be achieving in all their properties. It covers all properties that social landlords let, unless a particular property does not have to meet part of the standard. Beyond SHQS, landlords should be looking for cost-effective ways of achieving higher energy-efficiency standards for their properties, to provide warmer homes for their tenants and help to meet climate change targets.	**SHR ARC** Indicators 7,8,9 and 10 C24, C25, C26, C27, C28, C29, C30, C31	**SHBVN:** Core RSL CSMT **HouseMark Scotland:** Core Complaints Responsive Repairs VFM Toolkit **STAR in Scotland:** Core Other Charter Indicators, General Services
Strategy		
• Asset Management		
• Standard Delivery Plan		
Policy		
• Repairs & Capital Programme		
Performance Reports		
• Standard Delivery Plan updates		
• Impact of anticipated exemptions and abeyances		
• Benchmarking reports		
Public Information		
• Landlord's void standard		
• New tenants' satisfaction with property condition		
• SHQS delivery plan, including info on		
General Evidence		
• Tenants Newsletter on SHQS progress and capital spend		
• Annual rent increase letter to tenants		
• Survey of Tenants and Residents in Scotland (STAR in Scotland)		

Outcome 4 – Quality of Housing (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
Core	SHQS - Meeting (%)	Meeting Tolerable standard
		Meeting Free from serious disrepair
		Meeting Energy efficient
		Meeting Modern facilities and services
		Meeting Healthy, safe and secure
		Total percentage of dwellings meeting SHQS
	SHQS - Failing (%)	Failing Below Tolerable Standard
		Failing Free from Serious Disrepair
		Failing Energy Efficiency
		Failing Modern Facilities and services
		Failing Healthy, Safe and Secure
		Failing SHQS standard
RSL	SHQS	Failing Below Tolerable Standard
		Failing Free from Serious Disrepair
		Failing Energy Efficiency
		Failing Modern Facilities and services
		Failing Healthy, Safe and Secure
		Total Failing SHQS standard

Outcome 4 – Quality of Housing (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Major works & cyclical maintenance	Total cost per property major works and cyclical maintenance
Core	Major works & cyclical maintenance	Percentage of homes that fail to meet the Scottish Housing Quality Standard
Core	Responsive Repairs & Void Works	Average cost of a void repair

Secondary

Service	Reference	Title
Core	Major Works & Cyclical Maintenance	Dwellings failing SHQS - Number of Dwellings failing the SHQS
Core	Major Works & Cyclical Maintenance	Dwellings failing SHQS - Number of Dwellings failing two or more criteria
Core	Major Works & Cyclical Maintenance	Dwellings failing SHQS - Number of Dwellings failing one criterion only
Core	Major Works & Cyclical Maintenance	Dwellings failing SHQS - Number of Dwellings failing the Healthy, Safe & Secure assessment
Core	Major Works & Cyclical Maintenance	Dwellings failing SHQS - Number of Dwellings failing the Modern Facilities and Services assessment
Core	Major Works & Cyclical Maintenance	Dwellings failing SHQS - Number of Dwellings failing the Energy Efficiency assessment
Core	Major Works & Cyclical Maintenance	Dwellings failing SHQS - Number of Dwellings failing the Free from Serious Disrepair assessment
Core	Major Works & Cyclical	Dwellings failing SHQS - Number of Dwellings Below Tolerable Standard

	Maintenance	
Core	Responsive repairs & void works	Total cost per property responsive repairs and void works
Core	Development	Satisfaction - % satisfied with the quality of new home
Core	Major works & cyclical maintenance	Average SAP rating
Repairs VFM	Repairs VFM	Percentage of void repairs passing post inspection
Repairs VFM	Repairs VFM	The percentage of void repairs justified recalls
Complaints	Complaints	Number of new complaints about allocations per 1,000 stock
Complaints	Complaints	No. compliments about allocations per '000 stock

Outcome 4 – Quality of Housing (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Core Questions	CorS2 - Overall, how satisfied or dissatisfied are you with the quality of your home?
STAR in Scotland	General Services	Gen1 - How satisfied or dissatisfied are you with the overall condition of your home?
STAR in Scotland	Core Questions	CorS6 - Generally, how satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with repairs and maintenance?
STAR in Scotland	Other Charter Questions	CI16(A) and CI16(B) - Have you had any repairs carried out in this property in the last 12 months? Thinking about the LAST time you had repairs carried out, how satisfied or dissatisfied were you with the repairs service provided by [your landlord / landlord name]?
STAR in Scotland	Other Charter Questions	CI9(A) and CI9(B) - Did you move into the property in the last year, that is since [month/year]? Thinking about when you moved in, how satisfied or dissatisfied were you with the standard of your home?

Outcome 5 - Repairs, maintenance and improvements	National	Benchmarking
Social landlords manage their businesses so that: • *tenants' homes are well maintained; with repairs and improvements carried out when required, and tenants are given reasonable choices about when work is done.* This outcome describes how landlords should meet their statutory duties on repairs and provide repairs, maintenance and improvement services that safeguard the value of their assets and take account of the wishes and preferences of their tenants. This could include setting repair priorities and timescales; setting repair standards such as getting repairs done right, on time, first time; and assessing tenant satisfaction with the quality of the services they receive.	**SHR ARC** Indicators 11,12,13,14,15 and 16 C13 **Audit Scotland** Indicator 14 Repairs	**SHBVN** Core RSL CSMT **HouseMark Scotland** Core Responsive Repairs VFM Complaints Gas safety **STAR in Scotland** Core Other Charter Questions, General Services Responsive Repairs
Strategy		
• Asset Management		
• Business Plan		
• Standard Delivery Plan		
Policy		
• Repairs		
Performance Reports		
• Day to Day Repairs Cost & Performance Reports		
• Customer Satisfaction with Repairs & Planned Maintenance		
• Appointments System Performance		
• Pre, Post Inspection & Variation Control		
• Gas Safety Performance		
• Benchmarking reports		
Public Information		
• Tenants Handbook Repairs Section		
• Website content		

General Evidence		
• Stock Condition Information		
• Survey of Tenants and Residents in Scotland (STAR in Scotland)		

Outcome 5 - Repairs, maintenance and improvements (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
Core	Number % of repairs by category	Emergency out-of-hours
		Emergency in-hours
		All emergency repairs
		Urgent
		Other
		Total number of repairs
		Number of repairs per house
	% Repairs completed on time	Emergency out-of-hours
		Emergency in-hours
		All emergency repairs
		Urgent
		Other
		Total % of repairs on time
	Average time to complete work	Average time taken to complete non-emergency repairs
		Average working days between approval for aids and adaptations and completion of work
	Target response time	Emergency in-hours (in hours)
		Emergency out of hours (in hours)
		Urgent (in days)

		Other (in days)
	Right to repair	Numbers qualifying as Right to Repair
		Percentage qualifying as Right to Repair
		Number of Right to Repair failures
	Satisfaction and first time fix	% customer satisfaction with repairs service
		Percentage of non-emergency repairs fixed first time
	Repairs by appointment	% of repairs by appointment
		% of repairs appointments kept
	Repairs inspections	% repairs pre-inspected
		% repairs post-inspected
	Budget management	Budgeted responsive cost per annum
		Actual responsive cost per annum
		Actual responsive cost as percentage of budget
		Budgeted planned maintenance cost per annum
		Actual planned maintenance cost per annum
		Actual cost as percentage of planned maintenance budget
		Actual total repair spend as percentage of total repair budget
		Architects fees included in maintenance actual total spend
	Repairs costs and expenditure	Value of reactive and planned repairs in year
		Amount spent by DLO
		Percentage spent by DLO on day to day repairs
		Cost of variations in year
		Percentage cost of variations in year
	Reactive Repair costs	Cost to renew front door
		Cost to renew WC pan
	Planned maintenance costs	Average cost to fit replacement bathroom
		No. of bathroom replacements completed in the year
		Average cost to rewire a property
		Number of properties rewired in the year

	Gas safety	Number properties requiring gas safety certificate
		Number gas safety certificates obtained within 12 months
		% gas safety certificates obtained
		Average cost of gas safety visit
RSL	Repairs Targets	Emergency Repairs Target (hours)
		Urgent Repairs Target (days)
		Routine Repairs Target (days)
	Number of Repairs	Emergency
		Urgent
		Routine
		Total Repairs Completed (All Cats)
		Number repairs per tenancy
	% Repairs by category	Emergency
		Urgent
		Routine
	Repairs Completed Within Time	% Repairs Completed - EMERGENCY
		% Repairs Completed - URGENT
		% Repairs Completed - ROUTINE
		% of Repairs Completed (All Cats)
	Average time to complete non-emergency repair	Number of days to complete non-emergency repair
		Percentage of non emergency repairs fixed first time
	Planned / Cyclical Maintenance	% repairs budget spent on reactive repairs
		% repairs budget spent on planned / cyclical maintenance
	Repair costs	Average Cost Per Void Repair
		Average Cost - Gas Service
		Average Cost - Emergency Repair

Appointments		Number of appointments made
		Percentage of non-emergency jobs by appointment
		Number of appointments kept
		Percentage of appointments kept
Pre & Post Inspections		Percentage of non-emergency repairs pre-inspected
		Percentage of repairs post-inspected
Variations		Cost of variations in year
		Value of variations as a percentage of total response repairs budget
Gas Safety		Number of properties that have gas appliances and flues at 31 March
		Number of certificates obtained before previous expiry
		Number of current certificates at 31 March
		% safety check carried out within 12 months
		% safety checks complete at 31 March

Outcome 5 - Repairs, maintenance and improvements (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Responsive repairs & void works	Total cost per property responsive repairs and void works
Core	Responsive Repairs & Void Works	Repairs completion time - average number of calendar days taken
Core	Responsive repairs & void works	Percentage of tenants satisfied with the repairs and maintenance service.
Core	Major works & cyclical maintenance	Average SAP rating
Gas safety	Gas safety	% of respondents very or fairly satisfied with gas servicing arrangements

Secondary

Service	Reference	Title
Core	Responsive Repairs & Void Works	Repairs completions - number of repairs completed in one visit as % repairs orders
Core	Responsive Repairs & Void Works	Repairs appointments - number kept as a percentage of repairs orders (excludes emergencies)
Core	Responsive Repairs & Void Works	Repairs completed on time - all repairs %
Core	Major Works & Cyclical Maintenance	Landlord Gas Safety Record - properties with a gas appliance that have a valid landlord gas safety record %
Repairs VFM	Repairs VFM	Percentage of responsive repairs passing post inspection
Complaints	Complaints	Number of new complaints about repairs and maintenance per 1,000 stock
Complaints	Complaints	No. compliments about repairs and maintenance per '000 stock

Outcome 5 - Repairs, maintenance and improvements (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Core Questions	CorS2 - Overall, how satisfied or dissatisfied are you with the quality of your home?
STAR in Scotland	General Services	Gen1 - How satisfied or dissatisfied are you with the overall condition of your home?
STAR in Scotland	Core Questions	CorS6 - Generally, how satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with repairs and maintenance?
STAR in Scotland	Other Charter Questions	CI16(A) and CI16(B) - Have you had any repairs carried out in this property in the last 12 months? Thinking about the LAST time you had repairs carried out, how satisfied or dissatisfied were you with the repairs service provided by [your landlord / landlord name]?
STAR in Scotland	General Services	Gen9 - How satisfied or dissatisfied are you with gas servicing arrangements?

STAR in Scotland	Responsive Repairs	Rep1 Have you had any repairs to your home in the last 12 months? Rep2 Thinking about the last repair completed, how satisfied or dissatisfied were you with the following? • Rep2a Being told when workers would call • Rep2b Being able to make an appointment • Rep2c Time taken before work started • Rep2d The speed of completion of the work • Rep2e The attitude of workers • Rep2f The overall quality of work • Rep2g Keeping dirt and mess to minimum • Rep2h The repair being done 'right first time' • Rep2i The contractors doing the job you expected Rep2j The repairs service you received on this occasion
STAR in Scotland	Responsive Repairs	Rep3 Did the contractor show proof of identity?
STAR in Scotland	Responsive Repairs	Rep4 If you had an appointment for this repair, was it kept?

Neighbourhood and Community		
Outcome 6 - Estate Management, anti-social behaviour, neighbour nuisance and tenancy disputes	**National**	**Benchmarking**
Social landlords, working in partnership with other agencies, help to ensure that: • *tenants and other customers live in well maintained neighbourhoods where they feel safe.* This outcome covers a range of actions that social landlords can take on their own and in partnership with others. It covers action to enforce tenancy conditions on estate management and neighbour nuisance, to resolve neighbour disputes, and to arrange or provide tenancy support where this is needed. It also covers the role of landlords in working with others to tackle anti-social behaviour.	**SHR ARC** Indicators 17,18, 19, 20, 21 **Scot Govt** Housing Management Return (Evictions Form)	**SHBVN:** Core RSL CSMT **HouseMark Scotland:** Core Estate services Complaints ASB **STAR in Scotland:** Core General Services ASB
Strategy		
• Anti-Social Behaviour		
• Community Planning Partnership Strategy		
Policy		
• Anti-social Behaviour		
• Evictions		
Performance Reports		
• ASB Strategy Action Plan Progress & Updates		
• ASB Case Management Reports		
• ASB Case Handling Customer Satisfaction		
• Benchmarking reports		
Public Information		
• Tenants Handbook		
• ASB Leaflets		

• Website Content		

General Evidence		
• Service Level or Partnership Agreement with other Services (i.e. police, mediation services)		
• Approach to Estate Inspections		
• Warden Services		
• Neighbourhood Satisfaction Surveys		
• Eviction Reports		

Outcome 6 - Estate Management, anti-social behaviour, neighbour nuisance and tenancy disputes (cont.)

SHBVN Benchmarking Measures

CORE	Anti-social behaviour complaints	Number of cases open at 1 April
		Number of new cases opened during the year
		Number of cases closed during the year
		Number of cases open at 31 March
		% customer satisfied with ASB complaint handling
	Anti-social behaviour and evictions	Number of evictions due to ASB
		% cost of total day to day repairs arising from criminal damage
	ASBOs	Number of ASBOs applied for LA properties/ tenants
		Number of ASBOs granted for LA properties/ tenants

Outcome 6 - Estate Management, anti-social behaviour, neighbour nuisance and tenancy disputes (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Housing Management	Total cost per property estate services
Core	Housing Management	Total cost per property anti-social behaviour
Core	Housing Management	Total cost per property tenancy management
Core	Housing Management	Total cost per property rent arrears and collection
Core	ASB	Percentage of closed ASB cases that were successfully resolved
Core	Housing Management	Total cost per property estate services

Secondary

Service	Reference	Title
Core	Housing Management	Satisfaction - % respondents satisfied with anti-social behaviour case handling
Estate services	Estate services	Average time taken for the removal of fly tipping (per instance - hours)
Estate services	Estate services	Average time taken for the removal of offensive graffiti (per instance - hours)
Estate services	Estate services	Average time taken for the removal of non-offensive graffiti (per instance - hours)
Estate services	Estate services	Average time taken for the removal of syringes and needles (per instance - hours)
Estate services	Estate services	Average time taken for the removal of abandoned vehicles (per instance - hours)
Estate services	Estate services	% of respondents very or fairly satisfied with overall estate services provided by their landlord
Estate services	Estate services	% of respondents very or fairly satisfied with the grounds maintenance service

Service	Reference	Title
Estate services	Estate services	% of respondents very or fairly satisfied with the internal cleaning service
Estate services	Estate services	% of respondents very or fairly satisfied with the external cleaning service
Estate services	Estate services	Year most recent Peer Review was carried out
Estate services	Estate services	'Peer Review' Quality Score – Total
ASB	ASB	Referral to, or provision of, mediation as a % of total actions taken to tackle ASB
ASB	ASB	Referral to, or provision of, a family intervention project, tenancy support service and/or parenting programme as a % of total actions taken to tackle ASB
ASB	ASB	Referral of complainant to support service (e.g. drug; alcohol; victim or witness support etc) as a % of total actions taken to tackle ASB
ASB	ASB	Cases resolved by Eviction as a % of closed resolved cases

Outcome 6 - Estate Management, anti-social behaviour, neighbour nuisance and tenancy disputes (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	ASB	Asb6 Overall, how satisfied or dissatisfied are you with the final outcome of your anti-social behaviour complaint?
STAR in Scotland	Core Questions	CorS3a and CorS3b - Overall, how satisfied or dissatisfied are you with: your neighbourhood as a place to live? [your landlord / landlord name]'s management of the neighbourhood you live in?
STAR in Scotland	General Services	Gen6, 6a, 6b and 6c - How satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with the following? Anti-social behaviour Complaints Your enquires generally

Access to Housing and Support		
Outcomes 7, 8, and 9 - Housing options	**National**	**Benchmarking**
Social landlords work together to ensure that: • *people looking for housing get information that helps them make informed choices and decisions about the range of housing options available to them.* • *tenants and people on housing lists can review their housing options.* Social landlords ensure that: • *people at risk of losing their homes get advice on preventing homelessness.* These outcomes cover landlords' duties to provide information to people looking for housing and advice for those at risk of becoming homeless. These duties include helping tenants and people on housing lists to review their options to move within the social housing sector or to another sector.	**SHR ARC** Indicators 22 and 23 C7, C8, C9, C10 **Scot Govt** Housing Management Return (Housing List) HL1 Prevent1	**SHBVN** CORE RSL CSMT **STAR in Scotland** General Services
Strategy		
• Local Housing Strategy/Homelessness		
• Tenancy Sustainment		
Policy		
• Allocations		
• Evictions (& Section 11)		
Performance Reports		
• Allocations		
• Nominations & Section 5 Referrals		
• Application Registration & Management (i.e. suspensions, offers per let)		
• Customer satisfaction with access & allocations process		
• Benchmarking Reports		
Public Information		
• Housing Application Form		
• Information Leaflets		
• Website Content		

General Evidence		
• Settling In Visits		
• S11 Evidence		
• Compliance with National Information & Advice Standards		
• Housing Options Guide – Housing Options Approach		
• Survey of Tenants and Residents in Scotland (STAR in Scotland)		

Outcomes 7, 8, and 9 - Housing options (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
Core	Customer satisfaction levels	% tenant satisfaction with allocations process
	Benefits administration and process times	Gross administration cost per case
		Average time to process new claims (days)
		Average time to process changes of circumstances (days)
	CHRs and CBL in use	Landlords operating CBL
		Landlords operating a CHR
	Homeless prevention	% of staff trained to national Standards
		% Qualified staff that undergo regular assessment
		% presentations from applicants with prior social work intervention
		% of all those approaching the homeless service that were provided with full information & advice
		% those provided with I&A that were prevented from becoming homeless
		% tenancy failures receiving support at time of tenancy end

Outcomes 7, 8, and 9 - Housing options (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	General Services	Gen6 and 6d - How satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with the following? Moving or swapping your home (transfers and exchanges)

Outcome 10 - Access to social housing	National	Benchmarking
Social landlords ensure that: • *people looking for housing find it easy to apply for the widest choice of social housing available and get the information they need on how the landlord allocates homes and their prospects of being housed.* This outcome covers what social landlords can do to make it easy for people to apply for the widest choice of social housing that is available and suitable and that meets their needs. It includes actions that social landlords can take on their own and in partnership with others, for example through Common Housing Registers or mutual exchange schemes, or through local information and advice schemes.	**SHR ARC** Indicator 20 and 21 C7, C8, C9, C10, C11, C12 **SCORE returns** **Scot Govt** Housing Management Return (Housing List)	**SHBVN** Core RSL CHR Position Study **HouseMark Scotland** Core PI Tracking Complaints **STAR in Scotland** Advice and Support
Strategy		
• Local Housing Strategy/Homelessness		
• Tenancy Sustainment		
Policy		
• Allocations		
• Evictions (& Section 11)		
Performance Reports		
• Allocations		
• Nominations & Section 5 Referrals		
• Application Registration & Management (i.e. suspensions, offers per let)		
• Customer satisfaction with access & allocations process		
• CHR/CBL Performance Reports		
• Benchmarking reports		
Public Information		
• Housing Application Form		
• Information Leaflets		
• Website Content		

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General Evidence		
• Settling In Visits		
• S11 Evidence		
• Compliance with National Information & Advice Standards		
• Housing Options Guide – Housing Options Approach		

Outcome 10 - Access to social housing (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
Core	Lets and nominations to RSLs	Number of nominations invited
		Permanent Lets as a result of nominations
		Number of Section 5 referrals to RSLs
		Permanent lets to RSLs as a result of Section 5
		Total number of RSL lets in LA area in year
		Nominations and Section 5 referrals as percentage of all RSL lets
	CHRs and CBL in use	Landlords operating CBL
		Landlords operating a CHR
	Tenancy terminations	Notice given
		Abandonment
		Death
		Eviction
		Total number of tenancy terminations
	Tenancy Turnover	Tenancy Turnover
	Tenancy Changes - number	Mutual Exchanges
		Successions
		Assignations
		Reinstatement of Tenancy
		Joint Tenancies
		Total number of tenancy changes
	Tenancy Changes	Mutual Exchanges
		Successions
		Assignations

		Reinstatement of Tenancy
		Joint Tenancies
	Offers per letting	Total number of offers
		Total number of offers per letting
	Tenancy sustainment	Total number of houses let in previous year
		Of which terminated within 12 months - number & percentage
		Of tenancies terminated, % allocated from housing register and transfers
		Of tenancies terminated, % allocated from homeless route
	% tenant satisfaction with allocations process	% tenant satisfaction with allocations process
RSL	Lets made to each category	Existing Tenants
		Assessed as Statutorily Homeless
		Applicants from your housing list
		Nominations from LA
		Other
		Total number of lets
	% of lets that are new	% of lets that are new
		% Existing Tenants
		% Assessed as Statutorily Homeless
		% from your housing list
		% LA Nominations
		% Other
	LA Statutorily Homeless	% & number Section 5 Referrals
		% & number Nominations from LA
		% & number Other
	Section 5 referrals	Number received / housed
		Percentage S5 successful
	Equal Opportunities	Number on Housing Register
		Number & % of applicants from ethnic minorities

		Total Number of Lets
		Number & % of Lets to applicants from ethnic minorities
	Offers Per Letting	Number of offers made to applicants
		Average offers per letting
	Tenancy Turnover	Tenancy Turnover

Outcome 10 - Access to social housing (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Housing Management	Total cost per property lettings
Core	Lettings	Units available for letting but vacant at the year-end %
Core	Lettings	Units unavailable for letting and vacant at the year-end %
Core	Lettings	Average time in days to re-let empty properties
Core	Responsive Repairs & Void Works	Rent loss due to empty properties (voids) as a percentage of rent due.
Core	Responsive Repairs & Void Works	Repairs completion time - average number of calendar days taken

Secondary

Service	Reference	Title
PI Tracking	PI Tracking	Percentage of new tenants satisfied with the allocation and letting process
Complaints	Complaints	Number of new complaints about allocations per 1,000 stock
Complaints	Complaints	No. compliments about allocations per '000 stock

Outcome 10 - Access to social housing (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Advice and support	Aas2 - How satisfied or dissatisfied are you with the advice and support you receive from [your landlord / landlord name] with the following? Aas2a Moving home Aas2b Support for new tenants Aas2c Support for vulnerable tenants

Outcome 11 - Tenancy sustainment	National	Benchmarking
Social landlords ensure that: • *tenants get the information they need on how to obtain support to remain in their home; and ensure suitable support is available, including services provided directly by the landlord and by other organisations.* This outcome covers how landlords can help tenants who may need support to maintain their tenancy. This includes tenants who may be at risk of falling into arrears with their rent, and tenants who may need their home adapted to cope with age, disability, or caring responsibilities.	**SHR ARC** 17,18,19,20,21,22,23 and 24 C11, C12 **Scot Govt SCORE** returns **Scot Govt** HL1 Prevent1	**SHBVN:** Core CSMT **HouseMark Scotland:** Core **STAR in Scotland:** Core Other Charter General Services Advice and Support Supported / Very sheltered
Strategy		
• Local Housing Strategy/Homelessness		
• Tenancy Sustainment		
Policy		
• Housing Support		
• Tenancy Sustainment		
• Allocations		
• Debt Advice & Prevention		
Performance Reports		
• Evictions		
• Tenants Sustainment Strategy Updates		
• Tenancy Failure Numbers & Reasons		
• Housing Support Cost & Performance		
• Benchmarking reports		
Public Information		
• Leaflets on Housing & Tenancy Support		
• Website Content		

General Evidence		
• Data from review of tenancy failure		
• Housing Support Assessment Form		
• Debt Advice & Prevention work		
• Partnership arrangements with specialist agencies & services		
• Survey of Tenants and Residents in Scotland (STAR in Scotland)		

Outcome 11 - Tenancy sustainment (cont.)

SHBVN Performance Measures

Service	Reference	Title
Core	Lets	Tenancy Turnover
	CHRs and CBL	Landlords operating CBL
		Landlords operating a CHR
	Tenancy Changes - number	Mutual Exchanges
		Successions
		Assignations
		Reinstatement of Tenancy
		Joint Tenancies
		Total number of tenancy changes
	Tenancy sustainment	Total number of houses let in previous financial year
		Of which terminated within 12 months - number
		Of which terminated within 12 months - percentage
		Of tenancies terminated, % allocated from housing register and transfers
		Of tenancies terminated, % allocated from homeless route
	satisfaction with allocations	% tenant satisfaction with allocations process
	ASB evictions	Number of evictions due to ASB
	Repeat presentations	Cases reassessed as homeless/potentially homeless within 12 months of previous assessment

Service	Reference	Title
		% cases reassessed during year
	Homeless prevention	% of staff trained to national Standards
		% Qualified staff that undergo regular assessment
		% presentations from applicants with prior social work intervention
		% of all those approaching the homeless service that were provided with full information & advice
		% those provided with I&A that were prevented from becoming homeless
		% tenancy failures receiving support at time of tenancy end
	Section 11 referrals	Number of referrals from RSLs
		Number of referrals from private landlords
		Number of referrals from mortgage providers
		Total number of Section 11 referrals
RSL	Legal Action	Notices of proceedings issued
		Court actions initiated
		Orders of recovery of possession granted
		Repossessions
		Post-decree tenancy
		Abandonments
		Tenancy terminated
Core/RSL	Complaints	Complaints open at 1 April
		New complaints received in year
		Complaints answered during the year
		Complaints open at 31 March
		Number of complaints per 1000 tenancies

Outcome 11 - Tenancy sustainment (cont.)

HouseMark Scotland Performance Measures

Main

Service	Reference	Title
Core	Housing Management	Tenancy Turnover
Core	Housing Management	Percentage of tenants evicted as a result of rent arrears during the year
Core	Housing Management	Rent arrears - % tenants owing more than 13 weeks rent at year-end, excluding those owing less than £250
Core	Housing Management	Total cost per property tenancy management
Core	Housing Management	Total cost per property rent arrears and collection

Secondary

Service	Reference	Title
Core	Housing Management	Rent arrears - gross arrears written off as % rent due
Core	Housing Management	Rent collected (excluding current arrears brought forward) as a percentage of rent due.
Core	Housing Management	Rent arrears - former tenant as % rent due (excluding voids)
Core	Housing Management	Rent arrears - current tenant as % of rent due (excluding voids)

Outcome 11 - Tenancy sustainment (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Core Questions	CorS2 - Overall, how satisfied or dissatisfied are you with the quality of your home?
STAR in Scotland	General Services	Gen1 - How satisfied or dissatisfied are you with the overall condition of your home?
STAR in Scotland	Core Questions	CorS3, CorS3a and CorS3b Overall, how satisfied or dissatisfied are you with: your neighbourhood as a place to live? [your landlord / landlord name]'s management of the neighbourhood you live in?
STAR in Scotland	General Services	Gen6, 6a to 6d - How satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with the following? Anti-social behaviour Complaints Your enquires generally Moving or swapping your home (transfers and exchanges)
STAR in Scotland	Other Charter Questions	CI19(a), CI19(B) - Did you move into the property in the last year, that is since [month/year]? Thinking about when you moved in, how satisfied or dissatisfied were you with the standard of your home?
STAR in Scotland	Advice and Support	Aas1 - Thinking about your rent and income, how satisfied or dissatisfied are you with the advice and support you receive from [your landlord / landlord name] with the following Claiming housing benefit and other welfare benefits Managing your finances and paying rent and service charges
STAR in Scotland	Advice and Support	Aas2 - How satisfied or dissatisfied are you with the advice and support you receive from [your landlord / landlord name] with the following? Moving home

		Support for new tenants Support for vulnerable tenants
STAR in Scotland	Supported – Very sheltered	Sup1 - Thinking about where you live, how satisfied or dissatisfied are you with the following? Your support plan The frequency of contact with your support worker The overall service provided by your support worker The safety and security of your home

Outcome 12 - Homeless people	National	Benchmarking
Local councils perform their duties on homelessness so that: • *homeless people get prompt and easy access to help and advice; are provided with suitable, good quality temporary or emergency accommodation when this is needed, and are offered continuing support to help them get and keep the home they are entitled to.* This outcome describes what councils should achieve by meeting their statutory duties to homeless people.	**SHR ARC** Indicators 25,26,27 and 28 **Scot Govt** HL1, HL2, HL3 and Prevent1 **Audit Scotland** Indicator 19 Homelessness	**SHBVN** Core RSL **STAR in Scotland** Other Charter Questions
• Local Housing Strategy/Homelessness		
• Temporary Accommodation Procurement & Management		
• Housing Support		
Policy		
• Housing Support		
• Tenancy Sustainment		
• Allocations		
• Temporary Accommodation Management		
Performance Reports		
• Homelessness applications & application management		
• Nomination & Section 5 success		
• Temporary Accommodation Management		
• Tenants Sustainment Strategy Updates		
• Housing Support Cost & Performance Reports		
• Benchmarking Reports		
Public Information		
• Homelessness leaflets on where to get help		
• Information on what to expect once homeless		
• Leaflets on Housing & Tenancy Support		

• Website Content		

General Evidence		
Nomination and Section 5 Protocols		
Customer satisfaction reports		
Housing Support Projects & Information		

Outcome 12 - Homeless people (cont.)

SHBVN Performance Measures

Service	Reference	Title
Core	Temporary accommodation use	In own furnished accommodation
		In own NON furnished accommodation
		Housing Association
		Hostel - LA
		Hostel - Other
		B&B
		Women's refuge
		Leased from other providers
		Other
	Total Use of temporary accommodation	Total Use of temporary accommodation
		Number of properties leased from other providers
	Stay in temporary accommodation	In own furnished accommodation (in days)
		In own NON furnished accommodation (in days)
		Housing Association (in days)
		Hostel - LA (in days)
		Hostel - Other (in days)
		B&B (in days)

		Women's refuge (in days)
		Leased from other providers
		Other (in days)
	Cost of temporary accommodation per week	In OWN furnished accommodation
		In OWN non furnished accommodation
		Housing Association
		Hostel - LA
		Hostel - Other
		B&B
		Women's refuge
		Leased from other providers
		Other
	Occupancy rate and refusals	% Temporary Accommodation Offers Refused
		% Supported Accommodation Offers Refused
		% Occupancy Rate of Temporary Accommodation
	Satisfaction with TA standard	% satisfaction with TA standard
	Unsuitable accommodation and breach of Order	Number in unsuitable accommodation
		Number in breach of Order
	Assessments - number	Homeless - priority unintentional
		Homeless - priority intentional
		Homeless - non-priority
		Threatened with homelessness - priority unintentional
		Threatened with homelessness - priority intentional
		Threatened with homelessness - non-priority
		Ineligible for assistance
		Neither homeless nor threatened with homelessness
		Lost contact before assessment decision
		Withdrew application before assessment decision
		Homelessness resolved prior to assessment decision

		Total number of homeless assessments
	Homeless priority assessment %	Homeless - priority unintentional
		Homeless - priority intentional
		Homeless - non-priority
	Threatened priority assessment %	Threatened with homelessness - priority unintentional
		Threatened with homelessness - priority intentional
		Threatened with homelessness - non-priority
	Priority Need overall %	Priority need as % of all homeless / threatened
	Assessments %	Homeless - priority unintentional
		Homeless - priority intentional
		Homeless - non-priority
		Threatened with homelessness - priority unintentional
		Threatened with homelessness - priority intentional
		Threatened with homelessness - non-priority
		Ineligible for assistance
		Neither homeless nor threatened with homelessness
		Lost contact before assessment decision
		Withdrew application before assessment decision
		Homelessness resolved prior to assessment decision
	Homelessness outcomes	Housed by LA - SST
		Housed by RSLs - SST
		Private rented sector
		Hostel
		Bed & Breakfast
		Returned to friends etc
		Women's refuge
		Residential care etc
		No duty owed
		Contact lost before duty discharged
		Other - Known
		Other - Unknown
		Total number of homelessness outcomes

	Housed in tenancy	% housed by LA
		%housed by RSL
		% housed by private sector
	Time taken to assess	Less than 2 weeks
		2-4 weeks
		4-8 weeks
		Over 8 weeks
		Total number of decisions
	Case completion	Average number of weeks to complete case
	Repeat presentations	Cases reassessed as homeless/potentially homeless within 12 months of previous assessment
		% cases reassessed during year
	Homeless appeals	Number of appeals received against assessment
		Number of appeals upheld against assessment
		Number of appeals received against offer
		Number of appeals upheld in favour of applicant
	Section 11 referrals	Number of referrals from RSLs
		Number of referrals from private landlords
		Number of referrals from mortgage providers
		Total number of Section 11 referrals
	Homeless prevention	Number of Housing Option approaches / interviews
		Number of homelessness applications made after Housing Option approach
		Number of approaches that prevent homelessness (where known for certain)
		Advice given, but outcome not known otherwise
	Housing Support	Number of housing support assessments carried out for homeless people
		Number of people supported with housing during year by LA
		Number of people supported with housing during year by other service providers
	Average length of support (where support has ended)	less than 1 month
		less than 3 months
		less than 6 months
		less than 12 months
		Longer than 12 months

Outcome 12 – Homeless People (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Other Charter Questions	CI28 - How satisfied or dissatisfied were you with the overall quality of the temporary or emergency accommodation you were provided?

Getting Good Value from Rents and Service Charges		
Outcome 13 - Value for money	**National**	**Benchmarking**
Social landlords manage all aspects of their businesses so that: • *tenants, owners and other customers receive services that provide continually improving value for the rent and other charges they pay.* This standard covers the efficient and effective management of services. It includes minimising the time houses are empty; managing arrears and all resources effectively; controlling costs; getting value out of contracts; and giving better value for money by increasing the quality of services with minimum extra cost to tenants, owners and other customers.	**SHR ARC** Indicators 29,30,31,32 and 33 C20, C21, C22, C23 **SHR** Annual Accounts Submission **Scot Govt SCORE return** **Scot Govt** HRA Return	**SHBVN** Core RSL CSMT **HouseMark Scotland** Core Responsive Repairs VFM Toolkit Estate services VFM Toolkit **STAR in Scotland** Core General Services
Strategy		
• Business Plan		
• Service Improvement Plan		
• Asset Management Plan		
• Value for Money (VFM) Strategy		
Policy		
• Rent Increase		
• Efficiency or Value for Money Statement		
Performance Reports		
• Annual performance reports		
• Internal Audit Reports		
• Benchmarking reports		
Public Information		
• Tenants Rent Increase Letter		

• Tenants Newsletter		

General Evidence		
• Consultation Events		
• Business or Best Value Reviews		
• Performance Management Framework		
• Self-assessment activities & outcomes		
• Scrutiny results (i.e. inspection reports)		
• Minutes of internal scrutiny meetings		
• Quality Assured Scrutiny Accreditation (CIH and HouseMark)		
• Survey of Tenants and Residents in Scotland (STAR in Scotland)		

Outcome 13 - Value for money (cont.)

SHBVN Performance Measures

Service	Reference	Title
Core	Void repairs	% void repairs completed on time
		% tenant satisfaction with void standard
	Void rent loss	Rent loss due to voids
		% of gross annual rent loss due to voids
	Void expenditure	Number of properties becoming void throughout the year
		Total repairs revenue expenditure on voids
		Average expenditure per void
		Average cost of void safety check
	Repairs expenditure	Value of reactive and planned repairs in year
		Amount spent by DLO
		Percentage spent by DLO on day to day repairs
		Cost of variations in year
	Reactive Repair costs	Cost to renew front door

Service	Reference	Title
		Cost to renew WC pan
	Planned maintenance costs	Average cost to fit replacement bathroom
		No. of bathroom replacements completed in the year
		Average cost to rewire a property
		Number of properties rewired in the year
	Expenditure	Loan charges
		Supervision and management
		Repairs and Maintenance
		Arrears written off and lost on unlets
		CFCR
		Transfers to reserve funds
		Other expenditure e.g. hostels
		Contribution to General Fund
		Credit balance at year end
	Current tenant arrears	Number of tenancies at year end
		Number of tenancies in ARREARS at year end
		Percentage of tenancies in ARREARS at year end
		Cumulative current tenants arrears
		Current arrears as a % net rent due
		Average debt per tenant in arrears
	Former tenant arrears	% of tenancies ending in year with rent arrears
		Average debt owed by tenants leaving in arrears
		% Former Tenant Arrears written off
		% Former Tenant Arrears collected
		% Former Tenant Arrears written off or collected
	Rent and rent loss	Annual net rent debit
		Annual gross rent debit
		Current arrears at 31/3
		Rent gross collected in year
		Percentage rent collected

Service	Reference	Title
	Anti-social behaviour complaints	Number of cases open at 01/04
		Number of new cases opened during the year
		Number of cases closed during the year
		Number of cases open at 31/03
		% customer satisfied with ASB complaint handling
	ASB	% cost of total day to day repairs arising from criminal damage
	Cost of temporary accommodation	All Types
RSL	Void Loss	% General
		% Sheltered
		% Very Sheltered & Other Supported
		% Garages/lock-ups
		% Housing voids
	Void Expenditure	Total revenue repairs expenditure on voids
		Number of void properties included
		Average expenditure per void
		Average cost of void safety check
	Current Rent Arrears	Amount non-technical arrears
		Amount technical arrears
		Non Technical % Gross debit
		Technical % Gross debit
		Total % of Current Rent Arrears Gross debit
		Non Technical % Net debit
	Former Tenants Arrears	Amount non-technical arrears
		Amount technical arrears
		Non Technical % Gross debit
		Technical % Gross debit
		Total % of FTA
	Tenants leaving with arrears	% Tenants leaving with arrears

Service	Reference	Title
		Average debt owed when leaving
	Former tenants arrears	Percentage of former tenants arrears Written Off in Year
		% of former tenants arrears collected
	Repair costs	Average Cost Per Void Repair
		Average Cost - Gas Service
		Average Cost - Emergency Repair
	Cost per Dwelling	Management, maintenance admin
		Planned Maintenance
		Reactive and Void Maintenance
		Total cost per dwelling
	Management costs	Management costs as % of total cost

Outcome 13 - Value for money (cont.)

HouseMark Scotland Performance Measures

Main

Service	Reference	Title
Core	Housing Management	Total cost per property housing management
Core	Housing Management	Employees - direct housing management employees per 1,000 properties
Core	Housing Management	Total cost per property resident Involvement
Core	Housing Management	Total cost per property estate services
Core	Housing Management	Total cost per property anti-social behaviour
Core	Housing Management	Total cost per property tenancy management
Core	Housing Management	Tenancy turnover - the total number of tenancies ended each year as a percentage of all properties managed.
Core	Housing Management	Percentage of tenants evicted as a result of rent arrears during the year

Service	Reference	Title
Core	Housing Management	Total cost per property rent arrears and collection
Core	Housing Management	Rent collected (excluding current arrears brought forward) as a percentage of rent due.
Core	Housing Management	Rent arrears - former tenant as % rent due (excluding voids)
Core	Housing Management	Rent arrears - gross arrears written off as % rent due
Core	Housing Management	Rent arrears - current tenant as % of rent due (excluding voids)
Core	Housing Management	Total cost per property lettings
Core	Lettings	Units available for letting but vacant at the year-end %
Core	Lettings	Units unavailable for letting and vacant at the year-end %
Core	Responsive Repairs & Void Works	Rent loss due to empty properties (voids) as a percentage of rent due.
Core	Lettings	Average time in days to re-let empty properties
Core	Major works & cyclical maintenance	Total cost per property major works and cyclical maintenance
Core	Major works & cyclical maintenance	Percentage of homes that fail to meet the Scottish Housing Quality Standard
Core	Major works & cyclical maintenance	Average SAP rating
Core	Responsive repairs & void works	Total cost per property responsive repairs and void works
Core	Responsive repairs & void works	Percentage of repairs completed at the first visit
Core	Responsive repairs & void works	Percentage of all repairs completed within target time
Core	Responsive Repairs & Void Works	Repairs completion time - average number of calendar days taken
Core	Responsive repairs & void works	Percentage of residents satisfied with the most recent repair (when surveyed in accordance with the organisation's own survey format)
Core	ASB	Percentage of closed ASB cases that were successfully resolved
Core	Resident involvement	Percentage of resident board members
Core	Equalities and diversity	Percentage of diversity information held
Core	Resident involvement	Percentage of tenants very or fairly satisfied that their views are being taken into account.
Core	Tenancy management	Percentage of tenants very or fairly satisfied with the overall service provided

Service	Reference	Title
Core	ASB	Asb6 Overall, how satisfied or dissatisfied are you with the final outcome of your anti-social behaviour complaint?

Outcome 13 - Value for money (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Core Questions	CorS1 - Taking everything into account, how satisfied or dissatisfied are you with the service provided by [your landlord / landlord name]?
STAR in Scotland	Core Questions	CorS2 - Overall, how satisfied or dissatisfied are you with the quality of your home?
STAR in Scotland	General Services	Gen1 - How satisfied or dissatisfied are you with the overall condition of your home?
STAR in Scotland	Core Questions	CorS3, CorsS3a and CorS3b - Overall, how satisfied or dissatisfied are you with: your neighbourhood as a place to live? [your landlord / landlord name]'s management of the neighbourhood you live in?
STAR in Scotland	Core Questions	CorS6 - Generally, how satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with repairs and maintenance?
STAR in Scotland	General Services	Gen6, 6a to 6d - How satisfied or dissatisfied are you with the way [your landlord / landlord name] deals with the following? Anti-social behaviour Complaints Your enquires generally Moving or swapping your home (transfers and exchanges)
STAR in Scotland	Core Questions	CorS4 - Taking into account the accommodation and the services [your landlord / landlord name] provides, do you think the rent for this property represents good or poor value for money?

Outcomes 14 and 15 - Rents & Service Charges	National	Benchmarking
Social landlords set rents and service charges in consultation with their tenants and other customers so that: • *a balance is struck between level of service provided, the costs of the services, and how far current and prospective tenants and service users can afford them* • *tenants get clear information on how rents and other money is spent, including any details of individual items of expenditure above thresholds agreed between landlords and tenants.* These outcomes reflect a landlord's legal duty to consult tenants about rent setting; the importance of taking account of what current and prospective tenants and other customers are likely to be able to afford; and the importance that many tenants place on being able to find out how their money is spent. Each landlord must decide, in discussion with tenants and other customers, whether to publish information about expenditure above a particular level, and in what form and detail. What matters is that discussions take place and the decisions made reflect the views of tenants and other customers.	**SHR ARC** Indicators 29,30,31,32,33,34 and 35 C20, C21, C22, C23 **SHR** Annual Accounts Submission **Scot Govt** HRA Return	**SHBVN** Core RSL **HouseMark Scotland** Core Complaints **STAR in Scotland** Core Other Charter Questions
Strategy		
• Business Plan		
• Service Improvement Plan		
• Asset Management Plan		
• Value for Money (VFM) Strategy		
Policy		
• Rent Increase		
• Efficiency or Value for Money Statement		
Performance Reports		
• Annual performance reports		
• Internal Audit Reports		
• Benchmarking reports		

[table continues on next page]

Public Information		
• Tenants Rent Increase Letter		
• Tenants Newsletter		
General Evidence		
• Consultation Events		
• Business or Best Value Reviews		
• Performance Management Framework		
• Self-assessment activities & outcomes		
• Scrutiny results		
• Minutes of tenant scrutiny meetings		
• Performance Bulletins		
• Survey of Tenants and Residents (STAR)		

Outcomes 14 and 15 - Rents & Service Charges (cont.)

SHBVN Benchmarking Measures

Service	Reference	Title
Core	Average weekly rent	Average weekly rent of 2 bed flat
		Average weekly rent of 3 bed house
		Average weekly rent - bedsits
		Average weekly rent - 1 bed
		Average weekly rent - 2 bed
		Average weekly rent - 3 bed
		Average weekly rent - 4 bed +
		Average weekly rent of all stock
RSL	Average Rents	Average rents (existing stock)
		Average rents (new build)
	Factoring	Total gross Factoring Income
		Total gross Factoring Arrears
		Factoring Arrears as a % Gross Factoring Income

Service	Reference	Title
		Total Factoring Write-Offs as % Total Factoring Income

Outcomes 14 and 15 - Rents & Service Charges (cont.)

HouseMark Scotland Benchmarking Measures

Main

Service	Reference	Title
Core	Factoring	Total cost per property - Factoring (includes overheads)
Core	Factoring	Service charge arrears - year end arrears as % of charges due
Core	Factoring	Service charge collection - amount collected %
Complaints	Complaints	Number of new complaints about rents and service charges per 1,000 stock
Complaints	Complaints	No. compliments about tenant rents and service charges per 1,000 stock

Outcome 14 and 15 - Rents & Service Charges (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Core Questions	CorS4 - Taking into account the accommodation and the services [your landlord / landlord name] provides, do you think the rent for this property represents good or poor value for money?
STAR in Scotland	Other Charter Questions	CI33 - Taking everything into account, how satisfied or dissatisfied are you with the factoring services provided by [your landlord / landlord name]?

Other Customers		
Outcome 16 - Gypsies/Travellers	**National**	**Benchmarking**
Local councils and social landlords with responsibility for managing sites for Gypsies/Travellers should manage the sites so that: • *sites are well maintained and managed.* This outcome applies only to those councils and other social landlords that are responsible for managing these sites.	**SHR ARC** Indicators 36 and 37	**STAR in Scotland** Other Charter Questions
Strategy		
• Business Plan/Single Outcome Agreement		
• Local Housing Strategy		
• Homelessness Strategy		
Policy		
• Site Management		
• Tenancy Management		
• Illegal Encampment		
Performance Reports		
• Site Management & Costs		
• Investment Programme Activity		
Public Information		
• Site Facilities & Fees		
• Tenant Newsletter		
General Evidence		
• Housing Need & Demand Assessment		
• Consultation Events		
• Customer satisfaction		
• Service Level Agreements or Arrangements with Special Agencies		

Outcome 14 and 15 - Rents & Service Charges (cont.)

STAR in Scotland benchmarking measures

Service	Reference	Title
STAR in Scotland	Other Charter Questions	CI37 - How satisfied or dissatisfied are you with [your landlord / landlord name]'s management of your site?

Appendix 1 – Note on HouseMark Scotland benchmarking measures

HouseMark Scotland offers a number of benchmarking services. The key VFM service is the **Core benchmarking** annual cost and performance benchmarking service.   Core benchmarking enables social housing providers to make an informed, value for money assessment of their operations across the broad range of their business activities and covers:

- costs
- staffing
- performance
- tenant satisfaction – using our STAR methodology for standardised surveys

Other HouseMark Scotland 'specialist' benchmarking services that are identified separately in the preceding tables are:

- **Resident involvement benchmarking** - our resident involvement benchmarking service enables landlords to measure and compare on a like-for-like basis their resident involvement inputs (costs) and outputs (activities) and make VFM judgements about the service

- **Responsive repairs VFM toolkit** – this service enables landlords to focus 'in depth' on the overall management of responsive repairs, direct service delivery, contract management and operative productivity

- **Complaints benchmarking** - this service enables landlords to track the effectiveness, efficiency and tenant satisfaction with their complaints process in the context of SPSO expectations.

- **Estate services benchmarking** – the service measures a comprehensive range of indicators to give you a fully rounded analysis of your estate services

- **ASB benchmarking** – this service helps landlords measure and understand on a quarterly and annual basis the ASB they are tackling on a day-to-day basis.

- **Gas safety benchmarking** – this service, developed in consultation with CORGI, enables landlords to compare data on their compliance with the Gas Safety (Installation and Use) Regulations 1998 (GSIUR) and share information on methods used to achieve compliance

- **Performance Indicator (PI) tracking** – the only 'real time' benchmarking tool available to the UK housing sector and is used by hundreds of organisations to provide timely, comparative performance information on a quarterly and annual basis. Subscribers can input data and generate statistical reports and graphs at any time. The system updates in real time as new data is entered.

- Charter Indicator benchmarking – from the autumn of 2013 HouseMark Scotland are launching a service for their members in Scotland to benchmark all of their Charter indicators, including the Charter Context indicators. Where appropriate certain measures will be benchmarked quarterly in order to provide our Scottish members with 'real time' benchmarking of the key Charter indicators.

Appendix 2 – How to develop and monitor local performance measures: A guide for landlords and tenants

CIH Scotland, SHBVN, ALACHO and HouseMark Scotland believe that the process of defining and measuring Charter outcomes cannot be effective without equal thinking on how to involve tenants in this process and how to explain data in a comprehensible manner.

This topic is explored fully in the guide *How to develop and monitor local performance measures: A guide for landlords and tenants* jointly published by HouseMark and the Tenant Services Authority.

The key findings of this report are particularly relevant to Scotland at this time and can be summarised as follows:

Create a landlord-wide tenant scrutiny panel

We have adopted the term 'Tenant Panel' here to refer to arrangements that enable 'involved' tenants to hold the executive or Board or Housing Committee to account for service performance, cost and VFM. Such practice typically features a recognised group that has been established to represent the interests of all tenants. This model is often complemented by a range of less formal techniques aimed at involving the wider tenant body such as consulting a consumer panel of tenants or ad hoc 'open for all' events.

Although it might be possible to establish a set of Charter compliance measures without a Tenant Panel (e.g. by consulting the wider body of tenants via focus groups and surveys) it is difficult to envisage a system of effective scrutiny, challenge and accountability without the involvement of the collective voice of tenants in this manner. However, it is important that the Panel does not become the sole means of involving tenants or an elite group, detached from the wider body of tenants.

The Tenant Panel may be seen as the hub for the range of tenant involvement and scrutiny activity and the focal point for assessing performance and cost and holding the landlord to account. The Panel is able to consider a broad range of performance information and as a consequence better understand the 'story' of performance, cost and VFM. Such a body of tenants is also able to develop a degree of expertise in understanding the social

housing 'business.' This combination of having a deeper understanding of performance, cost and the 'business' makes for more considered scrutiny and challenge.

The landlord and Tenant Panel need to work together to:

- build up a 'story' of performance, cost and VFM by interpreting the key messages from the performance information and scrutiny activity
- reach an intelligent, balanced understanding of current service performance, cost and VFM
- identify where improvement action is required and decide what action to
- take improvement action
- monitor the results

Officers have a key role here in ensuring that tenants are not inundated with too much information and that they are not expected to analyse raw data. Officers should analyse the data and present the results in an easy-to-understand format. It is the distilled results of data analysis that tenants should be exploring with the landlord in order to build up a story of performance.

Set clear terms of reference for the tenant panel

Tenants involved in the Panel will need to be clear from the outset about the nature of their role.

Landlords will need to clarify who should be on the Tenant Panel, how they get appointed and what their relationship is with the rest of the tenant involvement structure and wider body of tenants.

Landlords will also need to clarify the role of the Tenant Panel and any sub-groups. For practical purposes, and to fit in with existing arrangements, the Panel may wish to delegate some of the work associated with developing and monitoring performance indicators to sub-groups that focus on specific service areas and which are also involved in service reviews and improvement work. However, the Panel needs to maintain oversight, as it represents the focus of tenant power within the organisation.

Clarity will also be required on the Tenant Panel's (and sub-groups) relationship with the board or housing committee, the extent and nature of Tenant Panel's (and sub-groups) powers, including powers of redress and agree dispute procedures.

Finally, from the outset, landlords will need to agree support and servicing arrangements for the Tenant Panel, i.e. training as well as managerial support and assistance, all of which has to be resourced. The Panel will not succeed without support and training – as we explain below.

Decide what to measure and how to report it

The landlord and Tenant Panel should work together to agree:

- what performance and cost information is required to monitor the achievement of Charter outcomes
- how information should be presented
- how the data can be benchmarked
- frequency of reporting to Tenant Panel and wider body of tenants

Set targets and standards

Having decided what to measure, the next step is to agree performance and VFM targets and standards that relate to Charter outcomes.
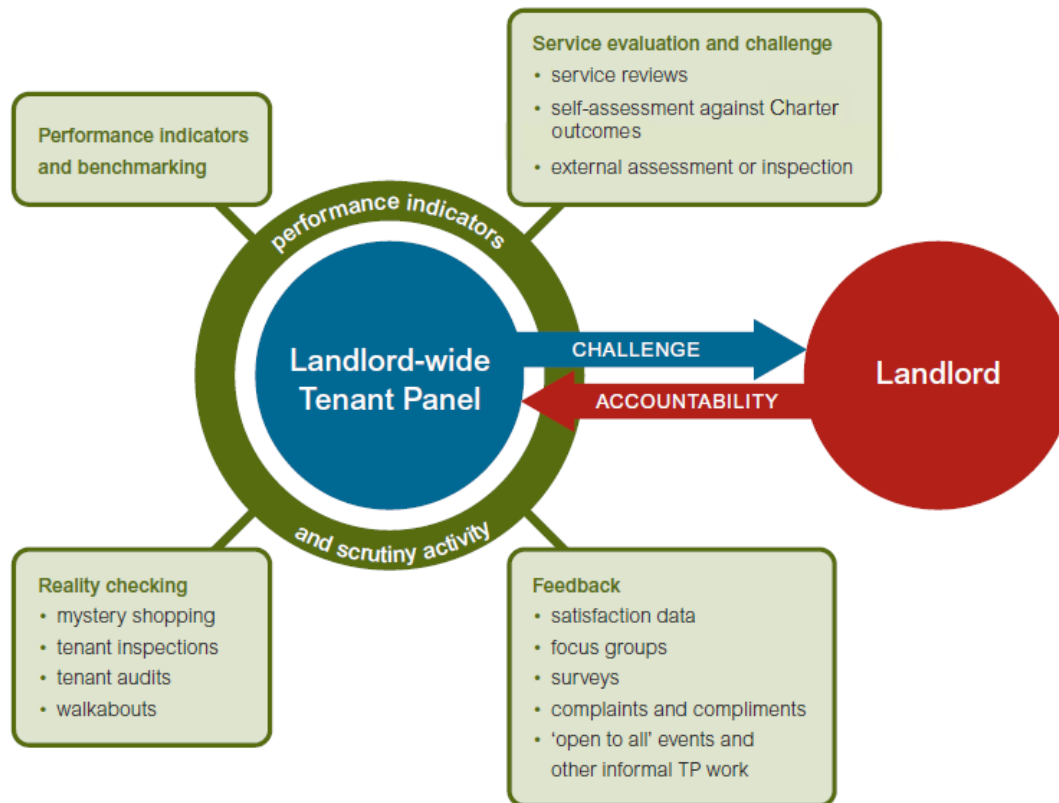
The landlord and Tenant Panel should work together to identify those indicators against which a target can be set and agree a target as part of a mature debate reflecting:

- associated costs and therefore what might not get done as a result of diverting resources
- what is ambitious but realistic - it has to be possible
- the lead in time for the landlord to adopt new practices and prepare staff
- the performance, cost and VFM of similar landlords

It may not be possible to set a target if you are using an indicator for the first time as you have no baseline performance score to refer to. This is where benchmarking data may well be useful, in terms of setting aspirational targets based on, for example, top quartile performance, cost and VFM.

The landlord and Tenant Panel will also need to identify those Charter outcomes where an indicator may not be possible but a standard can be applied, e.g. a lettable standard, cleaning standard, or achievement of external accreditation Once a standard has been set however, compliance with the standard can be measured or inspected and reported back to tenants.

The overall process can be diagrammatically described as follows (see next page):

Landlord-wide Tenant Panel

performance indicators and scrutiny activity

Performance indicators and benchmarking

Service evaluation and challenge
- service reviews
- self-assessment against Charter outcomes
- external assessment or inspection

CHALLENGE →

← ACCOUNTABILITY

Landlord

Reality checking
- mystery shopping
- tenant inspections
- tenant audits
- walkabouts

Feedback
- satisfaction data
- focus groups
- surveys
- complaints and compliments
- 'open to all' events and other informal TP work

Build the confidence and capacity of tenants

Some tenants, in spite of their active involvement in a range of activities, have fairly low levels of confidence in their own capabilities. This is particularly the case with the interpretation of performance or cost information. Bringing staff and tenants together to discuss ways to improve services and performance can help develop a shared understanding and sense of partnership, as well as improve tenants' confidence in their own skills and knowledge. This can be supported by joint training on monitoring and evaluating performance. Landlords need to identify the development needs of tenants and staff if they want to maximise input from tenants and provide appropriate staff support.

Commitment from the top

The board or housing committee and senior management team need to back the endeavour with resources and genuine support. If not championed from the top, it will fail. For many organisations, this represents a real practical and cultural challenge.

Some of the key decision-makers may have difficulty accepting the principles of meaningful involvement in organisational decision-making and being held to account by tenants. Winning them round will require skilful political management and persuasive argument.