

# Homefinder Somerset



... your home, your choice

A Countywide Overview and Scrutiny Review

September 2010

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# Choice Based Letting - Working Document

## Introduction

During July 2009 South Somerset District Council Scrutiny Committee sought the views of all members to inform its Forward Plan, the topic that members decided should be reviewed as a priority was Choice Based Lettings/Homefinder Somerset; this was primarily because a number of members had received enquiries and complaints from their constituents as they didn't understand the scheme or felt it was unfair.

The scrutiny committee agreed the ambition of the review should be; to achieve a high performing Choice Based Lettings system that is easily accessible, understandable and fair. To deliver a service that is best in its class and serves the needs of the community.

The review would focus on the customer experience/perspective.

As Homefinder Somerset was a countywide scheme with:

- One common housing register across Somerset (previously five separate registers).
- One lettings policy governs the work of all five authorities.
- Shared IT provision.

Members felt it would be beneficial to conduct a joint task and finish review with members and officers across Somerset to provide:

- Greater efficiency.
- An opportunity to share learning and Best Practice regarding conducting reviews and Homefinder Somerset.
- Better community representation, to inform an effective review.
- Greater influence of the Homefinder Somerset Board
- Each authority the opportunity to work in partnership seeking to improve service.

South Somerset District Council approached the Scrutiny Chairs and Officers across Somerset and invited them to join the review. Collectively the representatives from the authorities agreed a structure, ambition, terms of reference and project plan for the review.

Due to the wide scope of the review, it was agreed that the work would be separated into themed areas:

- Consultation
- Policy
- Statistics and benchmarking
- Web and Publications

Each themed area would have a dedicated officer and representation of members from across the County. This would ensure the review was truly countywide and provide a contact point at each council for every element of the review.

West Somerset District Council had to withdraw from contributing to the review due to a change of administration, a new scrutiny committee and scrutiny chair. Then unfortunately both Taunton Deane Borough Council and Mendip District Council were unable to provide officer support. This had a detrimental effect on communication across the authorities and the pace of the review.

However the remaining members and officers have successfully completed a detailed review of Homefinder Somerset. The focus of which was the accessibility of the scheme.

The culmination of the review is the following report complete with suggestions and recommendations that it is hoped will be considered by the Homefinder Somerset Board to enable the review to achieve its ambition.

## **Key to Recommendations**

Below is a summary list of recommendations that are grouped to show the section to which they refer. To assist the board the review group has used a key to show the priority of and potential cost implication of the each recommendation:

**Priority** : **H** = High, **M** = Medium and **L** = Low

**Potential Cost Implication**: **£££** = Significant, **££** = Moderate, **£** = Minimal, **-£** = Cost Neutral

## **1. Policy**

### **Policy/Banding**

**The Scrutiny Task and Finish Review Group for Choice Based Lettings recommends that:**

- a) A legal agreement is drawn up between all partner authorities, that allows for help to be provided to ensure any application backlog is cleared as soon as possible. (H £)**
- b) The authority clearing the backlog of applications would be remunerated by the authority requiring assistance. (H £)**
- c) If it is known that banding will take in excess of three weeks then an acknowledgement should be issued to the applicant advising them of a new date when they will be able to visit the website or telephone to get an update on when they can expect to be banded**
- d) The criteria involved in banding should to be more specific to ensure that there is less opportunity for personal interpretation by officers to play a part in the banding decision and to ensure that all Districts are allocating the same bands for the same criteria. (H £)**
- e) Consideration be given to providing an on-line officer resource of anonymous applications to enable staff from all authorities to make consistent decisions when banding new applications. (H £)**

### **Policy/Local Connections**

- a) The local connection policy needs greater detail as to which properties and situations it can be applied (H £)**
- b) The incorporation of a Rural Lettings Policy into the Local Connection section should be considered (H £)**

### **Policy/Bedroom Entitlement**

- a) The contradictions in the policy relating to bedroom entitlement needs to be addressed. (H £)**

### **Policy/Pets**

- a) There is engagement with the Registered Social Landlords (RSLs) to produce a common pet policy and introduce further symbols to give greater clarity of the type of pets permitted (H £)**

## **Policy/Registered Social Landlords**

- a) That Homefinder Somerset Board and the RSLs work together to produce a single application form to avoid duplication and confusion. (M ££)

## **Policy/Decant**

- a) The Homefinder Somerset Board considers making reference to decants in its Common Letting Policy and that the matter is covered by individual RSL policies. (L £)
- b) The Registered Social partners consider formulating a common Decant Aftercare Policy to ensure best practice and consistency of care across the county. (L £)

## **Policy/Social Inclusion**

- a) Provision of a free telephone number for the bidding process be investigated. (M ££?)

## **2. Communications**

### **Communications/Application Form**

**The Scrutiny Task and Finish Review Group for Choice Based Lettings recommends that:**

- a) Consideration be given to rewriting page two of the application form to ensure that the information is clear and logically presented with important items highlighted in bold.
- b) the information contained in the 'boxes' should be positioned closer to the beginning of the application form, especially the instruction to '*Use black ink and write clearly as possible using BLOCK CAPITALS in the spaces provided*'
- c) A list of the documents and information that an applicant will require in order to complete the application form be provided in the Guidance Notes
- d) Symbols be used in the Application Form as recommended in the Common Letting Policy
- e) The information regarding the Common Housing Register Partners; the five Housing Areas, a map of Somerset and details of the Local Authorities that follows the Guidance Notes be moved to the end of

**Application Form so that the Guidance Notes and the Application Form are closer together.**

- f) The Application Form be redesigned to provide a clear and simple layout, that will include larger areas for replies to questions.**

#### **Communications/Publications**

- a) Choice Based Letting is no longer a new way of finding a home and all publications/documents should be reviewed and new text created before reprinting.**
- b) The text in all documentation should be checked to improve consistency between documents, repetition, use of acronyms, lack of definitions and failure to highlight important information.**
- c) The property newsletter be given a more appropriate title.**
- d) Consideration be given to changing the colours and the page layout of the Property Newsletter.**
- e) The design of the property newsletter be improved by changing the colours and page layout to make it easier to use**
- f) Process is developed to ensure that there consistency in the use of symbols across the Districts**
- g) The display of symbols in the property newsletter be printed on a separate sheet rather than alongside the property advertisements.**
- h) All symbols be checked to ensure that definitions are improved and the descriptions are consistent across all documentation**
- i) Consideration be given to expanding the range of symbols used in all Homefinder Somerset Literature to include those that are being used without definition and those that could be used to improve social inclusion.**
- j) the content of the Common Letting Policy be simplified wherever possible to ensure that it can be understood by a lay person.**
- k) Homefinder Somerset Board considers the General Comments and seeks to refine the policy utilising the information provided in the comments.**
- l) the banding letter sent to inform applicants of the result of their application, should contain a list of symbols and their definitions that represent the applicants' need and therefore the properties for which they are allowed to bid.**

## **Communications/District Websites**

- a) All partner organisations have an easy to find page on their web site containing a brief description of the Homefinder Somerset Choice Based Letting Scheme. It should also show who the partners are and have an obvious link to the Homefinder site.**
- b) Consideration be given to the range and type of downloadable documents that should be displayed on District sites.**

## **Communications/Homefinder Somerset**

- a) Appropriate 'key words' be hidden in the programming to ensure any internet search for the Homefinder Somerset is simple as possible.**
- b) The Homefinder Somerset Board adopt a consistent colour code for the housing types in the property search section of the website and in the property newsletter (About Homefinder Somerset)**
- c) The Show Map and Services Links pop-up blocker text should be placed closer to the buttons rather than at the bottom of the page**
- d) Guidance notes should be provided detailing how to use the Show Map and Services Links web pages. These notes need to be made available in the same location.**
- e) A disclaimer to show that Homefinder Somerset is not responsible for or endorses the information on the Show Map and Services Links websites.**
- f) Clicking on the Registration button on the Homepage should take the applicant to the Registration form and not the Login Box.**
- g) Modify the website so that there is a clear division between registration and application by using a diagram to illustrate the actions an applicant must go through.**
- h) Information regarding the on-line application timing out after 30 minutes should be at the beginning of the application.**
- i) The site map be reconfigured to allow search engines to index the contents as accurately as possible.**
- j) The Homefinder Somerset Board consider all the detailed observations and proposals for improvement to the Website using the information contained in the report and appendices to create a more user friendly web site**



### **3. Evaluation of Bidding**

#### **Evaluation of Bidding/Customer survey responses**

- a) **To develop a mechanism to identify customers who are looking at the property advertisements and not bidding because there are no properties being available and use this information to improve customer service and to inform Local Authority Housing Strategies regarding Housing need(s) in specific areas. (M £££)**

#### **Evaluation of Bidding/Local Authority Staff, Registered Social Landlord Staff and Voluntary and Charitable organisation survey responses**

- a) **Look to introduce further filters to reduce the properties that customers have to either view through the Homefinder Somerset Website or listen to using the automated bidding telephone line making checking the property adverts easier, less time consuming and potentially less costly for customers. (H £££)**
- b) **Consider implementing a flag system preferably using the Abrisas system to highlight where a customer needs special assistance due to language at the earliest stage, i.e registration or failing that the application. To ensure documentation is issued in an alternative language and/or appropriate support is signposted or made available. (M £££)**
- c) **Issue guidance material to include appropriate elements of the Homefinder Somerset Common Lettings Policy and Strategy for those potentially disadvantaged to highlight the different bidding methods that are available and in addition to this include a template referral form to enable Charitable and Voluntary organisations to effectively help identify individuals that may need special assistance to place bids. (H £)**

#### **Evaluation of Bidding/Choice Based Lettings Partnership research**

- a) **Contact partnerships that have provided information for the review in the future to discuss take up of DITV and discuss any analysis and review work done by the partnerships to assess if it could prove beneficial to introduce DITV across Somerset. (L £)**
- b) **Coupons are made available as an alternative method of bidding. (L £)**
- c) **Provision of personalised free sheets/property newsletters are available for customers who have been identified from their application forms, review forms, referrals from outside agencies or other forms of communication to be in need of assistance. (H ££)**

- d) **The personalised free sheet/property newsletter service is advertised to show the Homefinder Somerset scheme is inclusive but is accompanied by a strict qualifying criteria to ensure the service is specific to those that really need it. (H £)**

#### **Evaluation of Bidding/Automated telephone system**

- a) **Should employ a person who is properly trained to provide clear and appropriately paced verbal commands/ descriptions drawing on the comments above. (M ££)**
- b) **Introduce a telephone system where the customer only has to dial one telephone number to be able to listen to the property description and place bids, like the system East Devon have procured. (M £££)**

#### **Evaluation of Bidding/Website/internet bidding**

- a) **Routinely consult with 'non IT Experts' and customers when there is a significant software update to test the guidance material and webpages for bidding on-line. (M £)**
- b) **Look to use standard terminology to make it easier for customers to compare the properties advertised. (H -£)**
- c) **Monitor property descriptions for plain language to aid customers to effectively place bids and to help prevent some customers placing inappropriate bids. (H -£)**
- d) **To consider replacing text where possible for symbols, for example where preference is given to those with a local connection or not suffering from any form of addiction. (M £££)**
- e) **Explore the possibility of having a dedicated telephone advisor to specifically assist customers who require assistance to access and look at the property advertisements on-line, and place a bid; the telephone number would only be displayed on appropriate web pages to prevent the number being misused. (L £££)**

#### **Evaluation of Homefinder Somerset Customer Service**

- a) **Publicise clearly the process that Homefinder Somerset Applicants have to go through using a process map/pictorial diagram highlighting**

anticipated processing/waiting times based on target service standards as set out in the policy. (M £)

- b) Notify customers if for any reason the processing/waiting times will be in excess of targeted service standards with a re-assurance that customer service/satisfaction is of great importance to Homefinder Somerset. (M -£)
- c) Display on the website as at today's date or the week commencing date staff are processing applications / change of circumstances received on, to keep the customer informed and reduce telephone enquiries. (H -£)
- d) If inconsistencies are identified in processing times across Local Authorities, particularly where an authority is not achieving the 21 days as set out in the policy look to potentially share the workload across the partnership to ensure equality of service across Homefinder Somerset, please see Appendix 28 for a proposed draft agreement to enable this to be achieved. (H £)
- e) If customers contact a Local Authority regarding Choice Based Letting, they should be asked how the service could be improved. (L £)
- f) Set up a customer/stakeholder group to propose suggestions evaluate potential solutions. (M £)

#### **Evaluation of Homefinder Somerset Customer Service/Local Authority Area Satisfaction**

- a) Staff from each Local Authority partner to shadow and learn from others particularly Sedgemoor regarding customer services working practices to identify and implement best practice to improve customer satisfaction (M £)

#### **Review of advertising/ Homefinder Somerset profile**

- a) Create a poster detailing what Homefinder Somerset is, how to register and apply and where to go for further information/advice. (M £)
- b) Explore the potential of displaying promotional posters in waiting areas across the health care sector in Somerset. (M £)
- c) Advertises in the free local newspapers on a periodic basis. (M £)
- d) Host an awareness day for local voluntary and charitable organisations to promote the Homefinder Scheme and to look to develop a relationship where the organisations work together effectively to

**distribute housing advice, application forms and appropriate guidance material. (H -£)**

**Review of advertising/ Homefinder Somerset profile/ Choice Based Lettings partnership research**

- a) Produce an equivalent of the Hackney Choice Access points for Somerset including access to free telephone facilities/local offices. This document should be distributed with a guide to bidding and displayed at all local offices as a minimum. (M £)**

**Statistics and Benchmarking**

- a) Monitor the amount of time cases are suspended for and ensure follow up procedures are adhered to. (L ££)**
- b) Monitor how long it is taking for changes of circumstances to be processed by Local Authorities. (M ££)**
- c) Work with Taunton Deane Borough Council to:**
  - Make sure the property adverts are accurate and the information relevant for customers looking to move. (M £)**
  - To monitor the number of rejected offers by customers and conducts a further investigation with the landlord if the rejected figures do not reduce considerably to a comparable level of the other landlords. (M ££)**
- d) Look to develop a method of capturing processing/waiting times with Abritas or a manual approach with the Local Authorities; this data is essential to make sure reasonable equality of service is provided across the partnership and the targets quoted in the policy and documentation are adhered to (M £££)**
- e) Reconsider what statistics are effectively assisting it to make sure the scheme is delivering what the partnership intended, strives to achieve in the future and makes sure the scheme is accessible for all. In particular the board consider:**
  - Monitoring the number of people who have successfully downsized (H £) (Details regarding the number of people successfully downsizing can be obtained by looking at the number of people that were under occupying that have now moved, then it can be traced back to see what band they were in)**
  - Benchmarking, using comparative figures from a similar sized partnership. (L £)**

- **Monitoring the number of banding appeals received, particularly those where the appeal has been put forward due to misinterpretation of the policy. This should be monitored to review the wording of the policy using the customers' perspective. (M £)**
  - **Monitoring the number of applications that are received incomplete and what further information is required to process them. This could help identify areas of weakness in the application form and or supporting documentation. (M ££)**
  - **Asking partners to routinely log the number and type of enquires received and categorise them as Unavoidable/Avoidable contact/Frequently asked questions to assist the board to identify any potential weaknesses in the scheme in terms of accessibility and efficiency and seek ways to address them. (L £)**
-

## 1. Policy

In evaluating the Homefinder Somerset Common Lettings Policy, the Task and Review Group aimed:

- to examine the banding criteria and test the system against policy.
- to test the bidding process to ensure that it was easy to understand and fair.
- to ensure the allocations policy was comprehensive, clear and fair
- to ensure there was a support system in place for all who need help

### **Banding Testing.**

Testing the system against the policy was achieved by submitting two sets of dummy applications. A number of applications were sent in under different names and addresses, but using the same data, to the different authorities in Somerset. It was hoped that by using this method it would be possible to test not just the system but also to assess the consistency of approach to the banding process by the Districts. The dummy applications were submitted, using the Homefinder Somerset online form, to Sedgemoor District Council, South Somerset District Council, Taunton Deane Borough Council, and West Somerset District Council.

The first set of dummy applications produced consistent banding of silver across the districts.

However, the time taken to process an application was not consistent in this particular case with the time varying from 0 days through to 36 working days.

The application form states, *“Once a completed form has been received, we will contact you within 21 working days to let you know whether you have been accepted for re-housing”* and the majority of authority’s dealt with the application very promptly, efficiently and had the banding completed well within the allotted 21 working days.

The problem with the application that took 36 working days was further compounded because no correspondence was received after 21 working days. After waiting 25 working days the ‘dummy’ applicant sent an email querying the delay. A reply arrived 3 working days later which stated:

*“Date sent: 20/07/2010 10:41:14*

*Thank you for your message.*

*Your application was submitted on 10th June 2010. Unfortunately we currently have a 6-8 week backlog and will write to you once your application has been processed.*

*Regards  
Housing Options”*

There was no time delay with the second set of dummy applications but there was inconsistency in the banding with two authorities banding application as bronze and the third as silver.

When asked Taunton Deane stated the silver banding was due to the medical condition of the joint applicant and Sedgemoor awarded bronze as it was felt to be a low medical need.

The all these applications were dealt with very promptly, with one authority processing the application on the same day and another taking only one working day.

The delays experienced for the banding process was felt to be an issue as this reflects not only on the Authority responsible but on the Homefinder scheme in general. Customers submit the applications online to Homefinder Somerset, not to a Local Council, thus giving the impression that it is Homefinder Somerset that is delaying their application.

A customer needing to be placed in the Emergency band could be put at greater risk if there is a delay in the banding process.

Having spoken to other authorities it has been suggested that it may be possible for other authorities to clear backlogs in other areas when needed.

**The Task and Finish Review recommend that:**

- **A legal agreement is drawn up between all partner authorities, that allows for help to be provided to ensure any application backlog is cleared as soon as possible.**
- **The authority clearing the backlog of applications would be remunerated by the authority requiring assistance.**
- **If it is known that banding will take in excess of three weeks then an acknowledgement should be issued to the applicant advising them of a new date when they will be able to visit the website or telephone to get an update on when they can expect to be banded**

The inconsistency in the banding due to the medical condition highlights the possible problems that might occur due to personal interpretation of circumstances. The silver band seems very broad and it was felt that two applicants could be given the same priority with quite widely varying circumstances. The Review Group recognised that would be hard to achieve a balance, for the policy was too prescriptive it would not allow for certain situations, however in a system which is based on joint working banding needs to be consistent and fair across all Authorities.

**The Task and Finish Review recommend that:**

- **The criteria involved in banding should to be more specific to ensure that there is less opportunity for personal interpretation by officers to play a part in the banding decision and to ensure that all Districts are allocating the same bands for the same criteria.**

- **That consideration be given to providing an on-line officer resource of anonymous applications to enable staff from all authorities to make consistent decisions when banding new applications.**

### **The Policy Document.**

The policy was compared to national guidelines and legislation to establish if the policy met the requirements set out and it was agreed that the policy document met the criteria set out in relevant acts and guidelines:

Housing Act 1996,  
Homelessness Act 2002,  
Fair and flexible: statutory guidance on social housing allocations for local authorities in England,  
Allocation of Accommodation: Choice Based Lettings - Code of Guidance for Local Housing Authorities.

However, there were some areas that where greater clarity would assist both the customer and the officers. Six such areas were considered in some depth.

### **Local connection.**

*“Although the banding system reflects housing need and subsequently the priority of each application, there may be occasions when it may be appropriate to protect housing for local people. Local connection is defined where an applicant has been continuously resident in the Homefinder Somerset Area for the past 3 years and is currently living in the area. This also applies to members of Her Majesty's Forces (HMF). Preference may be given to local residents who may be economically or socially driven from their community due to a lack of affordable housing. This will usually be due to planning restrictions (Section 106 Agreements)”.*

This statement makes no mention of existing housing stock it only mentions, those with section 106 agreements. Does this mean that housing that was established before 106 agreements cannot be used for Local connection? The Review Group felt that this area of the policy needed to be rewritten with more detail to give greater transparency.

The possibility of extending this section to incorporate a Rural Lettings Policy should also be explored. This should incorporate the housing that does not have a section 106 or covenant. This should be more specific than the local connection, where the applicant has been a resident of the Homefinder Somerset area for 3 years and currently living in the area. The Rural policy should narrow it down further to residents from specific villages. It may be necessary for each Authority to have its own Rural Lettings Policy depending on their aims and circumstances.

This was evidenced by the staff surveys in which an officer stated, *“Policy vague in areas such as rural lettings (when other than Section 106 do we apply local connection only criteria?)”*



**The Task and Finish Review recommend that:**

- **The local connection policy needs greater detail as to the properties and situations to which it can be applied**
- **The incorporation of a Rural Lettings Policy into the Local Connection section should be considered See Appendix 1**

**Bedroom entitlement.**

The policy, on page 15 paragraph 13.2, states *“Because of the very high demand for properties within Somerset, additional bedrooms cannot be given to applicants who do not have children who normally live with them or who might reasonably be expected to live with them. This will normally be a permanent or regular arrangement and not a temporary agreement”*

This statement is contradicted on page 13 where there is a statement that *“a childless couple will be entitled to bid for properties with a minimum of one bedroom and a maximum of two”* and this could cause problems for officers and confusion for members of the public. Staff surveys have highlighted that staff felt the policy needed to be tightened up to achieve consistency across the districts.

**The Task and Finish Review recommend that:**

- a) **The contradictions in the policy relating to bedroom entitlement needs to be addressed**

**Pets.**

The Review Group discovered that there was no policy within Homefinder Somerset for pets, and that it was down to the individual policies of Registered Social Landlord (RSL). However it was also clear from the RSLs that people with pets bidding for flats with a no pet's policy wasted a significant amount of time. As evidenced with survey response, *“Short listing is very lengthy as inappropriate bidding wastes staff time- e.g. people with pets bidding on flats with no pets policy’ I think there appears to be a lot of confusion re pets.”*

The symbol for no pets is a dog with a line through it and while the majority of customers would understand this symbol meant no pets, it is open for people to assume it means no dogs. This has the potential to encourage people with other kinds of pets to apply, thus wasting RSL officer's time.

Members felt that Homefinder Somerset should try to work with the RSLs to develop a common policy for pets. If this is not possible, the feasibility of compiling a list of what pets would actually limit the chance of housing, for example there is a big difference between dogs and a hamster. So does no pets actually mean no pets of any kind?

A clear definition would assist the public and reduce the number of bids placed on inappropriate properties.

**The Task and Finish Review recommend that:**

- b) There is engagement with the Registered Social Landlords to produce a common pet policy and introduce further symbols to give greater clarity of type of pets permitted**

### **Registered Social Landlords.**

When the Review Group were comparing the Homefinder Somerset Policy to those of the RSLs, it became apparent that many of the RSLs require customers to fill in additional forms to the Homefinder Somerset application form. These additional forms duplicate many of the questions that have already been answered in the Homefinder application. Guidance from the CLG, Fair and flexible: statutory guidance on social housing allocations for local authorities in England, states

*“Local authorities are strongly encouraged to consider – together with RSLs in their district – the scope for developing common approaches to the allocation of social housing. This could include the adoption of a common housing register and a common allocation policy, and local lettings policies which cover RSLs as well as local authority stock. Providing a single point of access to social housing and one set of rules, should help make the process of applying for social housing simpler and more transparent for applicants, and can reduce wasteful duplication of effort by social landlords and applicants. This may help remove some of the confusion and frustration which applicants currently experience. The TSA made clear in Building a new regulatory framework – a discussion paper (June 2009), that it views agreement locally between social landlords and local authorities on how accommodation should be allocated as desirable and important for fairness and transparency within local areas.”*

Whilst some RSLs are happy to use the information provided by Homefinder others feel that they need some additional information, despite the fact that the forms duplicate the information already provided. Many customers are not used to filling in such lengthy forms and can find the process daunting.

The Review Group felt that closer working was required between the RSLs and the Local Authorities to reduce duplication for the customer.

**The Task and Finish Review recommend that:**

- a) That Homefinder Somerset Board and the RSLs work together to produce a single application form to avoid duplication and confusion.**

### **Decants**

The issue of a lack of policy for decants was raised during the Review Group’s consideration of the Common Letting Policy. However, it has always been understood that decants sit outside the Choice Based Letting scheme because it is

an internal matter for individual landlords. The Review Group have concluded that in order for there to be complete transparency reference should be made to RSL policies on decants in Homefinder Somerset literature.

Concern was also raised regarding the provision or lack of aftercare for decants.

**The Task and Finish Review recommend that:**

- a) The Homefinder Somerset Board considers making reference to decants in its Common Letting Policy and that the matter is covered by individual RSL policies.**
- b) The Registered Social partners consider formulating a common Decant Aftercare Policy to ensure best practice and consistency of care across the county.**

### **Social Inclusion**

The Policy has clear guidelines and procedures for assisting all those who require help. The Review Group identified one area which could be a barrier for those on low incomes, that of the cost of bidding by telephone.

The Group discovered that many of the other Choice Based Lettings schemes have free phone numbers for the telephone bidding process. For customers with no access to the internet using the telephone to bid every week could become prohibitive. Many people on low incomes have mobile telephones rather than a landline number and using mobile telephones would again increase the cost to customers.

**The Task and Finish Review recommends that:**

- a) Provision of a free telephone number for the bidding process be investigated.**

### **Conclusion**

The Task and Review Group felt that:

- although the Policy does meet the criteria set out and covers most aspects, there was room for improvement.
- A more robust policy would reduce the opportunity for individual interpretation and benefit both the customers and officers
- Inconsistencies from officers, due to areas open to misinterpretation, could lead to false expectations on the part of the customer and accusations of inequality across the County and to increased potential for complaints.

## 2. Consultation

The Task and Finish Review Group felt consultation would be critical to the success of this review, particular as the review was being conducted in response to comments from customers and the review was focussing on making the service easily accessible, understandable and fair to serve the needs of the community. The review group needed to capture the thoughts, comments and experiences of the customers and stakeholders of Homefinder Somerset to identify potential areas of improvement.

The review created specific surveys to consult with the following groups:

- Registered customers of the scheme
- Customers who have been recently housed
- Local Authority customer facing staff
- Registered Social Landlord customer facing Staff
- Strategic/management representatives of Registered Social Landlords
- Local voluntary and charitable groups
- The General Public
- Health Care professionals

The Review Group wanted to ensure proportional representation of customers across the County and requested to have customer details for 10% of the applicants registered on Homefinder Somerset as follows:

- 30% to be Gold band
- 30% Silver band
- 30% Bronze band
- The remaining 10% Emergency band or all Emergency cases on the list if this is less than 10%.

This resulted in 1229 Paper surveys and 759 Electronic surveys being distributed. Unfortunately a number of the e-mail addresses that had been provided by customers were no longer active and to date 89 paper forms have been returned as undeliverable with various reasons (these have been forwarded to the appropriate Local Authority for further investigation) 281 responses were received, a return of in excess of 14%.

For information an example of the customer and general public consultation papers are in **Appendix 2**

Regrettably the Health Care professional survey was not distributed, it was hoped that the Primary Care Trust would help lead on the distribution of this survey, unfortunately this was not possible.

The surveys have been analysed using Survey Monkey. The results of the surveys have been referred to and included in each section of the report when they have been used to help the review group draw conclusions and make recommendations.

### 3. Communications

Having researched the publications, guidance notes and application forms of a number of Choice Based Letting schemes across the country the Review Group came to the conclusion that an exemplar for the Choice Based Letting Process was the Durham Key Options. The Durham User Guide provides all the information that an applicant could want from a summary of the policy through information on form filling and understanding how the scheme works, the various bidding options to contact details. The information provided is clear, simple and well presented and complements the application form. Although all the Somerset communication documentation has been considered and the findings presented below and in various appendices, The Task and Finish Review Group recommends that the Homefinder Somerset Board could look to use Durham Key Options as a template.

#### 3.1 Application Form

##### Guidance Notes - Layout

The two column format interspersed with boxes of bold text, as used on page two can and does appear confusing to some. The same format used on pages three through to seven has a much more logical feel and look.

##### Guidance Notes - Content

A further problem with page two is that the arrangement of text/information is not logically presented. For example, at the top of column one, applicants are asked if they require help to fill in the form. At this point the applicant's knowledge of Choice Based Letting may be limited and what they require is a brief introductory statement on the process – information that is to be found at the end of the first column under 'General Points'. Similarly, the second bullet point asks if help will be required with bidding when a prospective applicant has not even begun the registration process.

There also appears to be some repetition of information especially in the first five paragraphs of column two. **Appendix 3**

**The Task and Finish Review recommend that:**

- a) **consideration be given to rewriting page two of the Application Form to ensure that the information is clear and logically presented with important items highlighted in bold.**
- b) **the information contained in the 'boxes' should be positioned closer to the beginning of the Application Form, especially the instruction to 'Use black ink and write clearly as possible using BLOCK CAPITALS in the spaces provided'.**
- c) **A list of the documents and information that an applicant will require in order to complete the application form be provided in the Guidance Notes**

The Review Group felt that **many individuals would bypass the Guidance Notes and go straight to the Application Form**, so in the first instance the Notes were cross checked against the Form for inconsistencies. Such variances are listed below, page by page and identifiable by the section letter and question number. Miscellaneous comments such as spelling are listed separately **See Appendix 4**.

### **Page 3**

B4 Is the applicant to supply a copy of the maternity notes or does SSDC contact the Doctor? Either way no reference is made to these maternity notes on the application form.

### **Page 4**

C1/C2 There is no explanation of local connection or banding and given that applicant will be new to the process he/she is unlikely to know what the words mean. Local Connection is not referred to in the application form, neither is banding so there is no obvious reason for these for the notes.

C12 Notice to Quit. In the notes it asks that the section be '*completed and documentation provided*' but there is no request for documentation in the application form. Neither is there any mention of the fact that you have to have completed B13 if you have to leave as a result of the breakdown etc.

### **Page 5**

D1 The last sentence of the first paragraph states '*If you answered Yes to question D1 you will need to answer further questions in Section I*' which may seem clear here but in the document the figure 1 and the capital letter I are identical. It would help if the capital letter 'I' was followed by the title of the section 'Other Support Needs'

### **Page 6**

F2 '*Please tick the appropriate box to tell us if the house is owned by yourself or someone else*' which is different to what is actually asked in the form.

F3 If you are in arrears the notes tell you to contact your Local Authority for advice. This should also be on the application form.

### **Page 7**

H3 The applicant is told in the notes that if '*they would like us to contact a support worker please complete Section D3*'. (This information is not mention in H3 or D3.) This is followed by the highlighted statement '*Please note, if you do bid for a property you must be in a position to view and take up the tenancy*' which given the fact that H3 deals with people 'currently serving a custodial sentence' seems rather nonsensical.

### **Page 25 (in the Application Form)**

D1 The Common Letting Policy states that symbols should be used in the application and they are not. This question is the one area where symbols could be used.

**The Task and Finish Review recommend that:**

- a) Symbols be used in the Application Form as recommended in the Common Letting Policy**

**The Task and Finish Review recommend that:**

- b) The information regarding the Common Housing Register Partners; the five Housing Areas, a map of Somerset and details of the Local Authorities that follows the Guidance Notes be moved to the end of the document in order that the Guidance Notes and the actual Form are closer together.**

### **Application Form - Layout**

Some applicants thought that the grey background made the Form look more complicated than it perhaps was. Others, especially the elderly found the boxes too small to write in which made the form more difficult to complete. The Guide for Choice Based Letting Schemes and Landlords (Making Choice Based Letting Work for People with Learning Disabilities) recommends that forms should have large boxes and or space in which to write.

Three different application forms (Birmingham, Homechoice South Oxfordshire, and Durham Key Options) were compared to the Somerset form. All forms were simpler and clearer with larger boxes and better spaced text. In one the guidance notes were on the same page as the question making it easier to complete as it was not necessary to move back and fore between guidance and questions.

**The Task and Finish Review recommends that:**

- a) The Application Form be redesigned to provide a clear and simple layout, that will include larger areas for replies to questions.**

### **Application Form - Content**

Concern was expressed by members over the range and number of questions being asked. Some of the information requested seemed to be very personal and even intrusive and certainly above and beyond what should be required to assess a person's need for housing. This raised questions about Data Protection, where is the information stored and *'if it to be used for housing management and research purposes'* who has access to it?

There were also queries regarding

- the relevance of some questions for instance why is it necessary to know what fuel was used in the previous property (C9) how much housing costs (C4) or how a person travels to work (F1)
- why is the same information requested more than once



- Sections C Question 8 and 9 and F How does the information in these sections influence the banding? If they have no effect, what is the information used for.

## 3.2 Publications

The Review Group scrutinised a range of publications, looking for anomalies and inconsistencies in the text and any information that might create confusion for those using the scheme. Comparisons were made with documentation created by other authorities for their choice based letting schemes. **Appendix 5**

It has been suggested that the average national reading age is between 12 and 14, so it was considered important to ensure that the Homefinder Somerset publications were written in simple, easily understood and clear English. It was also felt that documents should be jargon free with as little repetition as possible. And finally, that the terminology used and the sentence construction should not be complex. When reviewing the publications, all these points were taken into consideration.

A feature common to the majority of the documents scrutinised was the use of phrases such as 'a new way of finding a home' or 'new way of looking for a home', on both the front covers and the internal pages.

**The Task and Finish Review would recommend that:**

- a) **Choice Based Letting is no longer a new way of finding a home and all publications/documents should be reviewed and new text created before reprinting.**

The general feeling of the Review Group was the same weaknesses occurred in many of the documents, too wordy; shortage of definitions, lack of consistency between documents, repetition, use of acronyms with no explanation and important information needing to be highlighted.

Having reviewed all the available Homefinder Somerset documentation it was found that ten of the documents need minor adjustment while two required significant changes. The details of the review of ten of the documents are in **Appendix 6**

**The Task and Finish Review would recommend that:**

- a) **The text in all documentation should be checked to improve consistency between documents, repetition, use of acronyms, lack of definitions and failure to highlight important information.**

The remaining two documents, where significant changes have been suggested and where inconsistencies exist, are detailed below:

### 3.2.1 About Homefinder Somerset

**Cover** The title '*About Homefinder Somerset*' is misleading as this document is actually the property newsletter. It is used to advertising the properties available in a particular bidding cycle and the Somerset version does not compare favourably with property newsletters produced by several of the other CBL schemes.

Like many of the other Somerset documents, mention is made of '*the new way of finding a home*'.

**The Task and Finish Review would recommend that:**

- a) **The property newsletter be given a more appropriate title.**

**How to bid** is described twice on the cover page. The second version is at the bottom of the page and each succeeding page presumably because a template has been created. The only problem with this footer is that when the results of the previous Choice Base Letting cycle are displayed they often conflict with the footer. The second sentence in the 'How to bid' information reads *'For a query on specific property please refer to the appropriate landlord.'* Unfortunately, nowhere in the document does it give contact details for *'appropriate landlords'*.

**General comment:** The first page of adverts also carries, at the top of the page, the statement *'CBL Property –Bids for these properties must be made no later than midnight on....'* followed by a specific date. This is important information yet is the same colour as the borders in the first column and as a result does not stand out.

**Property pages** are divided into three columns with, as already mentioned, the bidding information at the bottom of the page.

**First Column** This contains a series of boxes containing a picture of a property, the landlord's name, the type of property, the rent, and the number of bedrooms. The information in this column has a reddish brown border round each individual property which overpowers both the image and the number of bedrooms information ( white text on yellow background) Occasionally, property images have information across the image which without a magnifying glass is impossible to read.

**The Task and Finish Review would recommend that:**

- a) **consideration be given to changing the colours and the page layout of the Property Newsletter.**

Also in this column the weekly rental is listed but nowhere in the document is there reference to supported accommodation services charges or the council tax band for the relevant property. An absence of the tax band might give the impression that no council tax is payable. Neither is there any explanation of why Yarlington operates on a 48- week rental period and the RSLs a 52-week period.

**Second column** Contains the address of the property, the reference number, property details, and housing symbols. It would be helpful if there could be some consistency, across the five Districts, in the way in which the information in the second column is recorded and/or displayed. The Common Letting Policy states that *'Properties advertised will carry (where possible) a photograph and a full description. As a minimum the description will include:*

*Type of property  
Number of bedrooms  
Location of Property  
Any adaptations (e.g. disabled facilities)  
Services provided (e.g. support, caretaker, cleaning)  
Heating type  
Rent charged/service charges'*

Some Districts in Somerset use the housing symbols more than others. Occasionally information is given twice for example, '*Flat, 2<sup>nd</sup> floor, gas central heating, one bedroom flat second floor with off street parking*' together with the symbols for one bedroom and off street parking.

**The Task and Finish Review would recommend that:**

- a) Process is developed to ensure that there consistency in the use of symbols across the Districts**

Compare this with the Kent HomeChoice Property Newsletter where the text in an advert refers to information that cannot be given using a symbol or the Birmingham Property Newsletter where the bulk of the information is given using symbols. **See Appendices 7 and 8**

**Third Column** This carries a list of the housing symbols. These symbols would be better placed on just one page in the document thus allowing the use of a larger font (best practice Arial 12) and providing a greater area for advertising.

**The Task and Finish Review would recommend that:**

- a) the display of symbols in the property newsletter be printed on a separate sheet rather than alongside the property advertisements to allow a greater area for both symbol and description.**

There needs to be consistency in the descriptions of symbols – the flower symbol in the property newsletter and the document '*Strategy for those potentially disadvantaged etc.*' indicates that the property has a garden whereas on the web site and in the '*Bidding guide*' it means the garden is enclosed. Other symbols such as supported or sheltered need a better definition.

**The Task and Finish Review would recommend that:**

- b) all symbols be checked to ensure that definitions are improved and the description are consistent across all the documentation.**

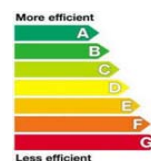
A new symbol is being used in the property newsletter for 'Housing Benefits recipients not accepted' which is not listed elsewhere.

The selection of housing symbols needs to be reviewed and expanded with comparisons being made to symbols on other CBL sites. For instance, the term '*local connection preference*' is occasionally seen in a property advert but there is no symbol or definition of the term in the newsletter. The only definition that appears to be available is to be found in the Common Letting Policy under Section 22.4 page 19.

**The Task and Finish Review would recommend that:**

- a) Consideration be given to expanding the range of symbols used in all Homefinder Somerset literature to include those that are being used without definition and those that could be used to improve social inclusion.**

In the future, consideration should also be given to including an energy efficiency symbol for each house – applicants should be given some idea of how costly a property might be to maintain.



**Outcome of CBL – Advertised between etc** At the end of the housing adverts there is a table showing the results of the previous bidding cycle. The title and the information at the end of the table are important and need to be enlarged and highlighted in some way.

### 3.2.2 Homefinder Somerset Common Letting Policy

**General Comment** This document is far too technical and detailed for general use and seems to be a reference document for Housing Officers, Homefinder District Partners, and Housing Associations. However, it is available as a pdf on both the Taunton Deane and Mendip sites and applicants using the online facility are directed to the policy when seeking more information on banding. It was felt that some consideration should be given to simplification wherever possible.

**The Task and Finish Review would recommend that:**

- a) **the content of the Common Letting Policy be simplified wherever possible to ensure that it can be understood by a lay person.**

Some areas of importance need highlighting.

**Page 3** 1.2 There is a list of the scheme's key objectives but no indication given of how these will be achieved or measured.

2.1 States that all applicants will be assessed against the same clear set of criteria. **See comments in 1. Policy Section, page 15 and 16**

2.2 Last sentence of this paragraph is out of date and in a reprint needs to be removed.

**Page 4** 2.4 The second sentence states that *'An offer will be made subject to a visit from the potential landlord to confirm the details on the original application form'*. The information given on the website is not the same, *'The landlord of the property will carry out any outstanding eligibility checks, (e.g. rent checks, household circumstance checks)'*. There should be consistency wherever possible.

2.6 The third sentence seems to provide the same information as is given in the first and second sentences, just different wording.

**Page 8** Split Families: The second paragraph states *'An application form should be completed by the household living in the worst property out of the households applying, to ensure the application is placed in the correct banding'*. In the Application Form under B2 the question is asked *'If any of the people listed here are not living with you at present, please give their current address and tell us why you are living apart.'* But nothing was found that conveyed the information above.

Page 19 22.4 The last sentence *'This will usually be due to planning restrictions (Section 106 Agreements)* Might be worth considering expanding this in a similar way to the entry in the East Devon Policy *'If there is a Section 106 planning agreement for a scheme, vacancies in that scheme will be labelled according to the criteria in the agreement. Similarly, if a scheme has been developed for a specific client group then the labelling will target that group'*. The East Devon Policy also contains an annex on *'Local Connection with a Town or Village'*. **See Appendix 9**

**Page 21** 24.1 As in 2.4 there is a lack of consistency with regard to what actually happens when an offer is made.

**Page 24** 30.1 The Application Form gives no indication in Section J Data Protection that there may be a charge should an individual request details of their personal data held by the District Authority.

**Page 24** 30.2 *'The information received, in conjunction with housing applications, may also be used for housing management and research'*. This statement is in Section J Data Protection but is not actually mentioned in Section K - the section applicants sign.

**The Task and Finish Review recommend that:**

- a) **Homefinder Somerset Board considers the General Comments and seeks to refine the policy utilising the information provided in the comments.**

### **3.2.3 Banding Letter**

**The Task and Finish Review recommend that:**

- a) **the banding letter sent to inform applicants of the result of their application, should contain a list of symbols and their definitions that represent the applicants' need and therefore the properties for which they are allowed to bid.**

Such an addition it is suggested would decrease the need for people to have to read the text on the adverts and would hopefully lead to a reduction in properties being declined.

### 3.3 District Websites

The evaluation of the District sites began with the question 'Did the partners' websites contain information on the Choice Based Letting process (CBL) and/or a link to the Homefinder site? The question was also asked of the Registered Social Landlord (RSL) sites.

The information on some of the District sites was not easy to find and given that it is generally believed that people searching on the Internet give up after three clicks of the mouse indicates that searches need to be simplified. **See Appendix 10**

The research also identified that there was no commonality between the District sites despite the fact that this was designed as a Countywide initiative. The aim should be to ensure that all Somerset residents have access to the same information. With the RSL sites the Group found no reference to the Homefinder Somerset site, only the suggestion that people should contact their local council office.

**The Task and Finish Review recommend:**

- a) that all partner organisations have an easy to find page on their web site containing a brief description of the Homefinder Somerset Choice Based Letting Scheme. It should also show who the partners are and have an obvious link to the Homefinder site.**
- b) Consideration be given to the range and type of downloadable documents that should be displayed on District sites. See Appendix 11**

### 3.4 Homefinder Somerset

The first task faced by the Review Group was to ascertain how easy it was to locate the Homefinder site if you had never heard of it. Numerous words were used in an attempt to access the site. These included 'houses to rent'; 'homes in Sedgemoor'; 'find a home'; 'social housing'; 'council housing'; to mention a few.

The first three sets of words and others like them invariably identified commercial letting sites. The last two sets of words were considered by some to be inappropriate as many Councils no longer own housing stock. However after canvassing a range of people it soon became clear that words such as 'council housing' and 'social housing' are firmly embedded in the English psyche and should be included in the list of 'key words' which are hidden in the programming and which are picked up by search engines such as Google.

**The Task and Finish Group recommend that:**

- a) Appropriate 'key words' be hidden in the programming to ensure any internet search for the Homefinder Somerset is simple as possible.**

Reviewing the Homefinder site was a little more difficult because, as was mentioned in Section 3.3, websites are living documents and are more easily updated or changed than paper publications. The Review Group when considering the site looked for:

- An image that did not confuse the eye
- Information that was simple, unambiguous, and logically presented
- Not too much repetition

A site that is user friendly to ensure that, in the future, it would become the primary location for activity concerning Choice Based Letting (CBL).

As with the Homefinder publications, the website was checked for content, language, spelling and punctuation. The site was also compared with choice based letting websites from around the country.

The checking process began with the Home page, with the top menu being considered next, item by item, followed by the side menu. Any problem areas were identified as each page was assessed. Where the text was considered too wordy or confusing some examples are given of what could be used. This document also includes responses from the surveys that were carried out.



# Home Page

homefindersomerset.co.uk

Home Property Search Login/My Account Recent Lets Contact Form

Sunday, 30-May-2010

Text Only View  
Site Map  
Text size: A A A

Home

**Home**

**Welcome to Homefinder Somerset** - this is now the way of finding a home to rent within Somerset that lets you select the homes you would like to be considered for. In order to be able to participate in this scheme you need to be registered for social housing.

We are a partnership of local authorities and housing associations working together to make the process of finding a home simple and transparent for all applicants looking for housing in Somerset. If you are looking for social housing anywhere in Somerset you now only have to complete one application form and your needs will be assessed against the same clear set of criteria no matter where you live. You will then be able to use our Choice Based Lettings service to apply for homes that you are interested in. Almost anyone can **apply** to join the scheme including existing tenants who would like to transfer.

**What can you do using this website?**

Using this website you will be able to:

- **Search** for available properties
- **Apply** for a property
- **View** results of previous lettings

**REGISTER NOW**

At first sight, what catches the eye are the information logos – Browsealoud, Google, Text Box etc – while the menus and text do not stand out. The main colours, we were told in consultation, were drab and the page looked incomplete with the rather large blank area to the right.

Furthermore it was suggested that it was not immediately clear which of the menus was the main and which was the sub. Neither of the menus were arranged logically such as in order of use. There was no obvious information on how you would apply to be put on the housing register. (The red Register button was not on the Home page when the Review started.)

The text on the Home page is somewhat repetitive and rambling. It should explain in very simple terms and as succinctly as possible what Choice Based Lettings is and the purpose of the website - a paragraph at the most. This page contains information that is dealt with elsewhere on the site and in more detail so why the duplication? Having a map of Somerset showing the five districts on this page showing where computer access and advice is available with opening times might be a better alternative.

In December 2009 the site carried a 'news item' regarding the Christmas Advertising Cycle but it was buried between the opening paragraphs and the 'What can you do using this website?' News items need to be given their own space.

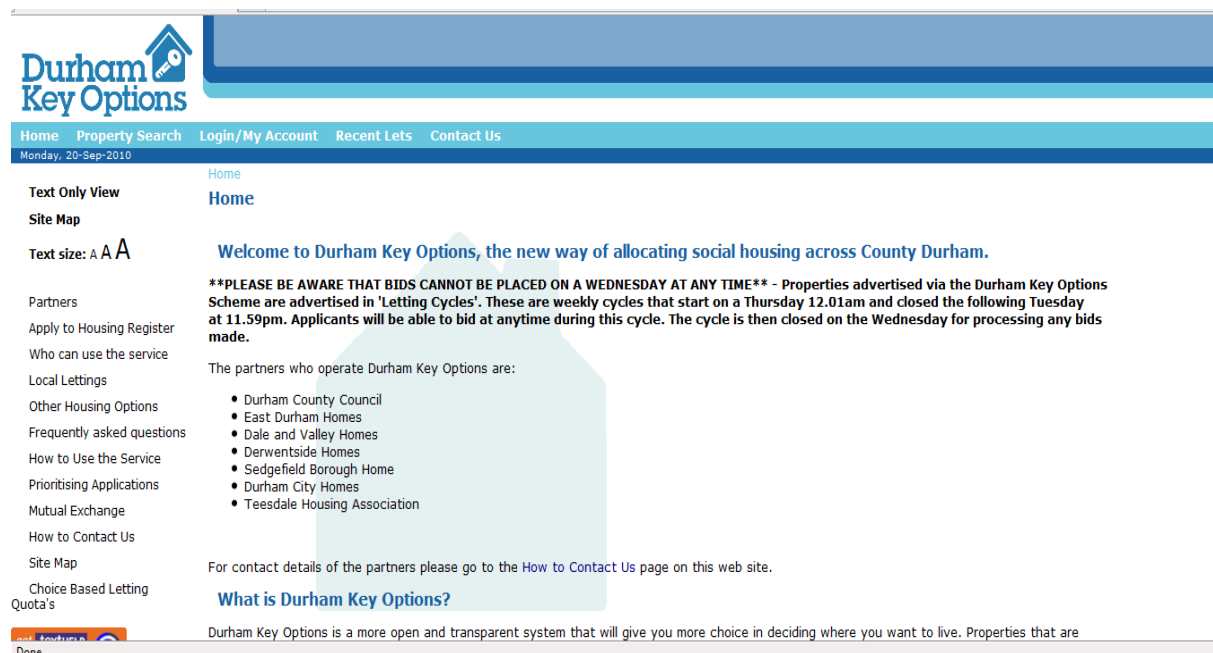
Comparisons were made with several different Choice Based Letting sites including Kent, Coventry, Cornwall, Derby, Durham and Lincoln to name but a few.

The Kent Homechoice example illustrates just how attractive a site can appear.



On this site, brand image is good, the menu is obvious, it is easy to read, the space is well used, news item stands out and the logos do not intrude.

Of the Abrisas sites that were examined the Durham Key Options was considered to be by far the best example.



Again the appearance is good and space is used to the maximum

The Durham Key Options site also highlights the 'Letting Cycles' on its Home page and the Property Search page with a banner headline:

**\*\*PLEASE BE AWARE THAT BIDS CANNOT BE PLACED ON A WEDNESDAY AT ANY TIME\*\* - Properties advertised via the Durham Key Options Scheme are advertised in 'Letting Cycles'. These are weekly cycles that start on a Thursday 12.01am and closed the following Tuesday at 11.59pm. Applicants will be able to bid at anytime during this cycle. The cycle is then closed on the Wednesday for processing any bids made.**

## **Property Search**

In the first section/box, '*Show all available properties*' the different types of housing (CBL, Mutual Exchange etc.) available are listed, all in green boxes. Further down the page in the '*Search for Property*', housing types are listed again but this time they are colour coded. As people react to easily identifiable images it might be worth considering using these colours in the first section as well.

A new box has been added since the Review started '*Show the properties I am eligible for*' which by using filters does precisely that saving the applicant a great deal of time. Officers commented that this addition has proved very popular with Homefinder Somerset applicants. A note of caution was expressed regarding the symbols for as they stand they are not always truly representative. **See 1. Policy pages 16 and 17**

In the '*Property Search Results*' section each individual advert has been expanded to include the tabs '*Show on map*', '*Show local services*' in addition to the '*Full details*' tab. This is an excellent idea but applicants not familiar with computers need to be informed that clicking these tabs will take the applicant off-site and provided with an explanation of what they need to do to return to the site. Again officers approved of the additions but have observed the complication mentioned in the last sentence and recommended that the additional information provided - *If the 'show map' and 'local services' do not open links to new windows a check needs to made for popup blocking software that may have been installed on the computer.* - should appear nearer the links rather than at the bottom of the page.

Another addition considered useful by the officers was that applicants can hover over a symbol and a brief description will appear alongside it. However, as already stated, symbols and their descriptions need to be improved and expanded.

Comments have been made regarding the quality and accuracy of the information provided on the Local Services link and officers would like to see a disclaimer and definition of local services provided. Consideration should also be given to the provision of a link to an internal document that would contain guidance notes on where the local services information will appear, how to zoom in and out and how to move from the initial view in different directions.

At the very bottom of the Property for Search section there are three 'Search Hints' listed. They are useful tips and need to be at the beginning of the section or at least in a darker font if they are to be noticed.

**The Task and Finish Review recommend that:**

- a) **The Homefinder Somerset Board adopt a consistent colour code for the housing types in the property search section of the website and in the property newsletter (About Homefinder Somerset)**
- b) **The Show Map and Services Links pop-up blocker text should be placed closer to the buttons rather than at the bottom of the page**
- c) **Guidance notes should be provided detailing how to use the Show Map and Service Links web pages. These notes need to be available in the same location.**
- d) **A disclaimer to show that Homefinder Somerset is not responsible for or endorses the information on the Show Map and Service Links websites**

**Login/My Account** This page of the website would be fairly clear and easy to understand if it was just about logging in to either bid on-line or check 'recent lets'. However this page is also used for registration. (Applicants wishing to fill in an application form on-line must first complete a registration form which will then issue them with their unique pin number without which the applicant cannot login and access the on-line application form. Whereas a paper application form is completed first and then the applicant is issued with both banding details and the unique pin number.)

It would cause less confusion if there was a clear dividing line between Login and Registration or if the registration process was on another page altogether. As it is, at present, there is:

- a paragraph about logging in
- a paragraph on what to do if you are not registered
- a paragraph, in bold, about the how much time is allowed to complete an application form
- a sentence on guidance for applicants applying on-line

Under all this is the Login box. In the bottom of this box there is highlighted text which, when clicked, takes the applicant to a registration form. Clicking on the 'Register' button on the home page opens the Login/Account page - it would make more sense for it to go straight to the Registration Form.

Once an applicant has completed the on-line application form, along with the message that appears confirming they are now registered and awaiting banding, a yellow star appears which could be misinterpreted as a gold star/gold banding – it is suggested that this be removed.

This area was of concern for District Officers who recognised, as the Review Group had, that this was two completely separate transactions but some applicants failed to realise this. They were also concerned about the high number of duplicated applications. There has to be a means of preventing applicants from creating new accounts when most of the time all they want to do is change a contact number.

The last bullet point above, the sentence on 'guidance for applicants applying on-line' with the click **here** button opens a pdf document showing how to complete the registration form and some details about the application form. At the end of these guidance notes is some fairly important information, one in particular being the fact that online applications will time-out after 30 minutes – this should be highlighted.

Included in this guidance should be some indication of the type and volume of information the applicant will require to enable him/her to complete the form. Unlike applicant using the paper form, an on-line applicant does not have the opportunity to see all the questions in advance because these guidance notes also state that the applicant will not be allowed to move forward from section to section until every question has been answered. The chances of an applicant completing the form in 30 minutes are slight as it is, without having to stop and find the information required.

There is the added complication that an applicant, who has been 'timed-out', might well begin the process afresh and inadvertently create another application form – a complication for housing officers.

**The Task and Finish Review recommend that:**

- a) Clicking on the Registration button on the Homepage should take the applicant to the Registration form and not the Login Box**
- b) Modify the website so that there is a clear division between registration and application by using a diagram to illustrate the actions an applicant must go through. See Appendix 12**
- c) Information regarding the on-line application timing out after 30 minutes should be at the beginning of the application.**

**Recent Lets**                      Clear and easily understood

**Contact Form**                      Clear and easily understood

**How the Scheme Works** This section is wordy, confusing and needs to be simpler. **See Appendix 13**

Buried in the Site Map can be found Step by Step instructions. This method of relaying information is far simpler and easier to understand than the method used in How the Scheme works. It is not clear why it was felt necessary to duplicate the information and would be less confusing if there was only one set of instructions.

The Step by Step method used by Durham is a good example of what can be achieved. **See Appendix 14**

It is important that any information under How the Scheme works or Step by Step instructions is as clear and informative as possible because, as we were told by District Officer, applicants '*most commonly ask for assistance*' when trying to understand the Scheme and the bidding on-line process. There needs to be a clear definition of the term 'BID' in either the Step by Step Instructions or How the Scheme Works.

**Prioritising Applications** The descriptive box on banding is clear and easily understood. The importance and relevance of the registration date also became a little clearer in the text under the box. Spelling: Emergency spelt incorrectly in second sentence after the 'banding box'.

**Frequently Asked Questions** The Review Group questioned how the type and number of questions had been generated and if a query is placed through the contact form on the site, is it being added to the 'Frequently Asked Questions'?

The **list** of questions appeared clear and concise. Closer examination of the questions revealed that the order of the questions could be improved. Questions 4,5,6 and 7 all relate to banding and so does question 15. Questions 3,8,12 and 13 relate to bidding. It would seem to make more sense if questions on one particular topic were grouped together. Care should also be taken to ensure that there is a logical progression through the group of questions. For instance question number 8 '**What do you mean by the term bidding - will I have to pay anything?**' should come before question number 3 '**When can I start bidding?**'

The answers to some of the question are not clear or simple. In some instances, it is merely a case of re-arranging the sentence order for example:

#### **What band will I be in?**

You will be notified of your band in your banding letter. You will be placed into a band, which is appropriate to your housing need. This will be assessed by what you have put on your form. We may come out to visit you to assess you housing circumstances.

This would read better if it read:

#### **What band will I be in?**

You will be placed into a band, which is appropriate to your housing need. This will be assessed by what you have put on your form. We may come out to visit you to assess you housing circumstances. You will be notified of your band in your banding letter.

In other cases the answer given seems to bear no relation to the question and certainly does not give the answer for instance:

#### **5. Why is the housing register points system being replaced with a new banding system?**

The Government has advised that local authorities should adopt a Choice Based Lettings system by 2010. The 5 local authorities, Taunton Deane Borough, Mendip District, South Somerset District, West Somerset and Sedgemoor District have created a county scheme called Homefinder Somerset.

Finally some questions should just be re-written. For example

#### **4. What is a banding system?**

The Homefinder Somerset system is based on a banding system. The five local authorities will no longer be operating a points based system. All applicants are now placed in one of four bands, Emergency, Gold, Silver and Bronze. Please see the [How we prioritise applications](#) page for more details.

would be easier to understand if it read:

#### **4. What is a banding system?**

The banding system has replaced the old points based system and applicants are placed in one of four bands, Emergency, Gold, Silver and Bronze. Please see the [How we prioritise applications](#) page for more details.

Comparisons were made with the 'Frequently asked questions' on other Choice Based Letting sites but there did not seem to be much common ground. For example, on the Cornwall site the questions were focused on what Choice Based Letting was, how it would be set up across the County and how it would operate – questions that one would expect to arise when a new system is set up.

Durham Key Options '*Frequently asked questions*' were closest to those found on Homefinder Somerset. **See Appendices 15 and 16**

**How to contact us** This is clear and concise.

**Housing Options** This page is clear and concise. However, the text under sub headings 'Mutual Exchange' and 'Shared Ownership', once again is confusing and repetitive. **See Appendices 17 and 18**

The District Officers felt that it would be helpful if the information shown with the mutual exchange properties identified the location or failing that at least the area.

**Private Rented Accommodation** No problems with this page.

**Homelessness** Clear and well presented

**Site Map** Site maps are a very important part of any web site.

- Search engines use site maps to index your website. A badly formatted site map can prevent or inhibit indexing which could result in a site being poorly represented on the Internet.
- Visitors use a site map to find their way round the site.

The map does not need to include everything on the site but it should have a logical structure. As has already stated, searching for the Homefinder site on the Internet was not easy which could mean it has not been indexed correctly.

Homefinder Somerset is a 'dynamic' website, one capable of changing and as such it is all the more important that the site map is correct as not all search engines find dynamic sites easy to index. **See Appendices 19 and 20**

**The Task and Finish Review Group recommends that:**

**The site map be reconfigured to allow search engines to index the contents as accurately as possible.**

**Partners** The images are good and make more impact than the short list of remaining partners at the bottom of the page.

**Advert Symbols** This section works. Would prefer to see it called Housing Symbols and some consideration given to alternative symbols. **See Publication section page 28 and 29 and Appendices 7 and 8**

#### **Miscellaneous Points on the website**

- Officers felt that the bidding system on line was fairly easy to use but that applicants found the registration process confusing.
- Officers thought that certain information needed to be capitalised and emboldened to ensure that applicants actually read it, such as: **THE CYCLE IS CLOSED MONDAY AND TUESDAY, TRY AGAIN ON BIDDING DAYS** and **Bidding cycle has been adjusted due to the public/bank holiday See Durham website on pages 34 and 35**
- Creation of a links page
- Information on when the web site was last updated
- Creation of a news area for example the Christmas Bidding Cycle.



**The Task and Finish Review Group recommend that:**

- a) The Homefinder Somerset Board consider all the detailed observations and proposals for improvement to the Website using the information contained in the report and appendices to create a more user friendly website**

#### **4. Evaluation of Bidding Methods**

The Task and Finish Review Group wanted to identify if the process of placing a bid is accessible for all and used the following methods to assess if Homefinder Somerset customers can bid with ease and effectively:

- Survey responses from customers, frontline staff and volunteer and charitable organisations.
- Research from other Choice Based Lettings (CBL) partnerships.
- Experience from shadowing at the Housing Advice Centres/reception.
- System Testing.

This report details the approach the review group took to evaluate the bidding options available, their conclusions and recommendations.

##### **Customer survey responses – Those still on the register**

The Review Group analysed the survey responses from those that are still on the register, the results show the majority of respondents know how to bid and they are able to bid for up to three properties per week. However the figures overall (see Appendix 6A) show 12.5 % of those that returned the survey have said that they disagree or strongly disagree with the following statements:

‘I understand what bidding means’

‘I know how to bid’

13.6 % said that they disagree or strongly disagree with the following statement:

‘I know I can bid three times per week’

18.8 % of the respondents indicated that they only check the property advertisements and intend to bid fortnightly or monthly. This could be for a variety of reasons:

- Not in urgent need of a property
- Too busy
- Not understand the bidding cycle/that properties are advertised on a weekly basis.

To try to clarify the potential issues with bidding, the Review Group identified how many respondents have never bid and why, 110 (40.7%) said they have never placed a bid and of that 110, 105 people detailed why, the reasons given primarily fall into the following categories:

- Future need
- No suitable properties
- Doesn't know how to bid
- No chance of being successful
- Not on the internet

This highlighted two issues:

- Customers not knowing how to bid
- Customers thinking the only way to bid is by using the internet

The full 105 responses can be seen in **Appendix 21**

### **Customer survey responses – Those housed in the last month**

- 90.9 % checked the property adverts and looked to bid weekly and a further 6.1 % fortnightly and none monthly.
- 97% of these customers bid for properties via the Internet and no customers found it difficult to bid.
- 70% of the customers recently housed originally completed their application on-line perhaps showing they are more comfortable using computers or have easier access; only 33.3% of customers still on the register applied on-line. However this result is somewhat contradicted by the responses indicating 75% of those still on the register bid on-line.

The Review Group conducted some equalities based analysis and confirmed there was no correlation between the applicant's age and activity that best describes what the applicant is doing at present and the ease of bidding.

The Review Group concluded from this:

- The comparative results of the two customer surveys, those still on the register and those customers recently housed, highlighted some clear and perhaps obvious differences.
- That the guide to bidding was not easily understood by all. There needs to be greater information and clarity about:
  - How individuals can get free access to the Internet. **See Advertising Section page**
  - How to use internet and the alternative methods to place a bid
  - That different properties become available each week

- Accessing and using Homefinder Somerset documents and website. **See Communications section pages**
- Alternative methods of bidding should be considered.
- That a mechanism needs be put in place to identify those people that are looking at the property advertisements but are not bidding due to there being no properties available, this information should be used to:
  - Prevent people from being contacted regarding why they are not bidding.
  - To highlight areas of significant housing need for the Local Authorities.
  - To relay information to customers regarding specific areas in high demand to potentially encourage them to consider broadening their search area or look for alternative forms of housing, for example the prevent rental market.

**The Task and Finish Review recommends that the Homefinder Somerset Board looks:**

- a) **To develop a mechanism to identify customers who are looking at the property advertisements and not bidding because there are no properties being available and uses this information to improve customer service as mentioned above and to inform Local Authority Housing Strategies regarding Housing need(s) in specific areas.**

In addition to surveys being sent to customers, the review group consulted frontline staff (people who work for Local Authorities, Registered Social Landlords and local charitable and voluntary organisations) to capture their perspective regarding bidding. This is especially beneficial as the most vulnerable customers probably would not have completed and returned the survey form.

Specific issues identified from reviewing the responses from each group are highlighted below:

**Local Authority Staff Consultation results (all Authorities to took part)**

52.2% of staff said one of the three things they most commonly had to assist customers with was bidding on-line (the second highest result to explaining the Homefinder Somerset Scheme). 8.7% said it was telephone bidding.

Below are comments staff provided that specifically relate to bidding when asked to detail the questions customers most frequently ask:

- Bidding via the telephone - too involved with too many lines and hashes to be pressed etc. Also the terminology on the phone line is different to the Internet i.e: memorable date. All wording should be consistent between phone line, internet, letters etc.

- When adverts are not available on Mondays and Tuesdays instead of the system telling them they are not eligible maybe it could explain that there are not any adverts available these days and therefore if they log in this is why they cannot bid.
- Why applicants are not eligible to bid on Mon and Tues (as no properties available but they do not realise that) Why there are no properties in general.
- I am unable to use a computer, I do not have access to a computer and am unwell, and without adequate support how do I gain access to social housing?

In response to the question do you feel the Homefinder Somerset System is accessible to all, of major concern, 45.8% said no. The following comments are the respondents' explanations as to why the scheme is inaccessible for all that specifically relate to bidding:

- The telephone bidding is a problem as if people do not have access to the internet they cannot see the view of the property and they cannot always make a correct assumption on the suitability of the property from the recorded message. Maybe if the newsletters could be made more accessible somehow they would have a better chance of bidding for the properties they want.
- Some of the more elderly or vulnerable clients may miss out on bidding as they do not understand and have no way of getting into our offices and we struggle to assist them due to demand in the office.
- Elderly people who not only struggle to use a computer, but also struggle with phoning to make a bid. This is also true for other, more vulnerable customers e.g people with learning disabilities. Some customers may not bid at all if they don't understand when and how to bid.
- **ELDERLY & VULNERABLE PEOPLE WITHOUT SUPPORT STRUGGLE WITH BIDDING - THERE ARE PROBABLY PEOPLE WHO HAVE NOT REGISTERED AT ALL ON SCHEME AND ARE UNAWARE OF SCHEME**
- I feel the scheme does not cater for the most vulnerable who need a high level of support such as street homeless, elderly and the infirm. Most have no support network have no idea how to use a computer and should not be expected to learn (the elderly or illiterate which is unreasonable) to gain access to housing. Some elderly do not even have the ability to make phone calls due to Alzheimer's and the like. There is not sufficient staff to monitor and 'bid' for these groups and voluntary groups are under strain and also cannot manage to support all who need it. I feel the most at risk/need in society are missing out on an asset which is predominantly for the low paid, disadvantaged in society and feel very frustrated by it.
- It alienates those who are not computer literate
- Not great for people who are not technology astute
- Customers living in remote areas with no internet/computer access

**Registered Social Landlord Staff Consultation results** (staff from only 7 RSL responded)

43.8% of staff say they help people to bid for properties advertised through Homefinder Somerset because:

- Our residents are not necessarily familiar with the area
- They use the computer in the office to access the website
- Some of our clients find computers off putting
- They are unsure how to use the system – (not Internet users)
- In response to requests from elderly frail applicants

In answer to the question 'Please can you detail any suggestions of how to improve the service?' the following comments were made in connection to bidding:

- Improve bidding system for those who cannot use the Internet.
- Have one telephone line to listen to adverts and to place bids.
- Improved telephone system - one line to hear properties and bid.
- Make sure they don't waste bids by bidding for properties they don't qualify for.

In response to the question, 'Do you feel the Homefinder Somerset Scheme is accessible for all?' 43.8% said no. Detailed below are all the comments that were received, as they were all specific to bidding:

- Elderly people without family who find it difficult to bid on properties
- Phone line isn't a great alternative to the web based version. Internet access is not available easily to all and required weekly to actively partake
- I feel it is accessible to most people but not all as if residents' don't have the internet they will sometimes not apply as the phone line is chargeable and people either cant afford to keep ringing or don't want to spend the money
- Vulnerable, elderly, those without computers or family/friends nearby who do have a computer, those with mental health issues, or learning disabilities. Those with limited understanding of how to use a computer.
- I don't feel that some elderly/ vulnerable people get all the help they may need. I think it's difficult if there is no PC available.

In response to the question, 'Please can you detail any questions that are based on misconceptions customers have regarding Homefinder Somerset/Choice Based Lettings?' The following comments were received:

- When bidding a lot of people consider ground floor the 1st floor

- Some believe they have to place 3 bids even though they have no desire to move to a property.
- That there are never any properties of the type they want to bid for
- If I don't have the Internet then CBL is not for me.

### **Local Charitable and Voluntary organisations Consultation responses (11 organisations completed the survey)**

In response to the question, 'please can you detail any frequently asked questions you receive from clients regarding applying for Social Housing through Homefinder Somerset?' the following response was provided in connection with bidding:

- I cannot bid on properties (mental health, lack of internet access etc), how do I get a property?

28.6% of the organisations that replied said they help people to bid and gave the following reasons why they had to help people:

- Difficult for people who do not speak English to understand the bidding system
- We do not have the resources to complete this task having said that we have experience of many clients not bidding as they are unable due to
  - Vulnerabilities
  - learning difficulties
  - mental ill health
  - lack of finance
  - lack of access to Internet or telephone
  - lack of help from LA.
- Wasn't clear that they couldn't bid on a particular property.

50% of respondents said they didn't feel the Homefinder Somerset Scheme was accessible to all. Explanations that refer to the bidding process are shown below:

- Some people, specially if you are homeless, do not have access to the internet
- Not everyone has access to or is capable of using the internet.
- No and we have repeatedly raised this issue. Many of the most vulnerable people we see struggle to access their entitlement to bid or understand the process. Reasons for this include;
  - learning difficulties

- mental ill health
- lack of finance
- lack of access to internet or telephone
- lack of help from Local Authority.

Unfortunately the Homefinder system does not appear to be: fair, inclusive, and accessible for many people.

The information/evidence supports the recommendations mentioned earlier in this section of the report and highlights:

- **A need for further filters to reduce the amount of properties people need to look through/listen to prior to placing a bid or to reduce the amount of bids that are placed inappropriately. If the landlord will accept pets is good example of this, this has been identified as a problematic area in survey responses, see Statistics and Benchmarking section 7 and Policy section 1.** Customers are not reading the adverts in enough detail or are misinterpreting the pet symbol.
- Bids are being placed inappropriately. The Task and Finish Review group has considered this and reported its findings in **Communications section**
- Some customers whose first language is not English are finding it difficult to bid. Further information or provision needs to be made available to ensure the service is inclusive and fair
- A need for the introduction of referral system to allow local and charitable organisations the opportunity to highlight individuals who are either vulnerable or who have specific needs and thus ensure the Homefinder Somerset system is as accessible as possible.

**The Task and Finish review recommends the Homefinder Somerset Board:**

- a) **Looks to introduce further filters to reduce the properties that customers have to either view through the Homefinder Somerset Website or listen to using the automated bidding telephone line making checking the property adverts easier, less time consuming and potentially less costly for customers.**
- b) **Consider implementing a flag system preferably using the Abritas system to highlight where a customer needs special assistance due to language, this should be picked up at the earliest stage, i.e registration or failing that the application. To ensure documentation is issued in an alternative language and/or appropriate support is signposted or made available.**
- c) **Issue guidance material to include appropriate elements of the *Homefinder Somerset Common Lettings Policy and Strategy for those***



***potentially disadvantaged* to highlight the different bidding methods that are available and in addition to this include a template referral form to enable Charitable and Voluntary organisations to effectively help identify individuals that may need special assistance to place bids.**

### ***Choice Based Lettings (CBL) Partnership Research***

The Review Group contacted the following CBL partnerships:

Cornwall Homechoice

Devon Homechoice

Kent Homechoice

East Durham Homes

Home Options – Broadland, Norwich and South Norfolk

(Contact details and representational bidding figures that were provided are in **Appendix 22**)

The review sought to identify the various methods of bidding each partnership offered its customers and to discuss the usability/success of each method, the results are as follows:

Unfortunately none of partnerships/authorities contacted have conducted a detailed analysis of their customer base and the bidding methods available to assess whether or not their Choice Based Letting system was truly accessible to all. One fact that did emerge from the discussions was that the majority of the applicants liked using the internet. However it was also apparent that alternative methods need to be available for those who do not have easy access to the internet (due to lack of facilities in the area, no broadband connection in area or have transport or mobility issues or are just not comfortable using it). The alternative bidding methods offered at present tend to be; telephone, text messaging/Short Message Service (SMS), Digital Interactive Television (DITV) and Coupons.

In discussions with the other partnerships it became clear that text messaging (SMS) is no longer a preferred method of bidding for customers so the review group chose not to explore this option further.

Although telephone bidding proves to be the second most popular method for all the partnerships that we liaised with, it is widely appreciated that this method doesn't work for some customers. Customers will look at paper adverts and telephone their local authority and ask an officer to place a bid on their behalf to avoid having to use the automated service - they struggle with the concept of listening to the details rather than viewing them. None of the partnerships we spoke to had a separate telephone line to listen to adverts and to place a bid.

DITV is still in its infancy for the partnerships that we have spoken with. The reasons the partnerships are trialling this is:

- To provide an additional access channel that enables viewing without having to use a computer.
- It has proved to be successful in other partnerships
- The Country going 'Digital', the system will be accessible for all.

Coupons are used by a number of authorities. Although these are not widely used by customers, this method is a good alternative and it can be introduced at very little cost to enable people who having hearing difficulties and prefer not to or cannot use the Internet or get access to it.

Cornwall Homechoice offer a very inclusive service advertising all the properties available on a weekly basis in a Saturday paper that can be purchased at a cost of 90 pence, this is practical solution as it can be used by those who would like to bid by telephone and/or by using Coupons. It also promotes the scheme to a wider audience but is a costly service to provide.

Kent Homechoice provides a personalised free sheet/property newsletter for those individuals that cannot access the system by an alternative method. (This combined with the ability to bid by coupon or over the telephone would ensure that people who are isolated due to disability/lack of transport/no Local Internet connection or who have hearing difficulties can be catered for ensuring that the system is inclusive.)

#### **The Task and Finish review recommends:**

- a) Contact partnerships that have provided information for the review in the future to discuss take up of DITV and discuss any analysis and review work done by the partnerships to assess if it could prove beneficial to introduce DITV across Somerset.**
- b) Coupons are made available as an alternative method of bidding.**
- c) Provision of personalised free sheets/property newsletters are available for customers who have been identified from their application form, review forms, referrals from outside agencies or other forms of communication to be in need of assistance.**
- d) The personalised free sheet/property newsletter service is advertised to show the Homefinder Somerset scheme is inclusive but is accompanied by a strict qualifying criteria is to ensure the service is specific to those that really need it.**

#### **Automated telephone system**

Members of the Task and Finish Review Group have tested the automated telephone system, listened to customers use it and refer to it when they have conducted shadowing at the Housing Advice Centres/ Local Authority office. Their observations of the systems are detailed in **Appendix 23**

The review tested the Devon Home Choice Automated telephone line for comparison and concluded that the service was preferable to that of Homefinder Somerset as a clear and concise message was given at the start and the property details were provided at a much more comfortable pace

**The Task and Finish review group recommend the Homefinder Somerset Board:**

- a) **Should employ a person who is properly trained to provide clear and appropriately paced verbal commands/ descriptions drawing on the comments above.**
- b) **Introduce a telephone system where the customer only has to dial one telephone number to be able to listen to the property description and place bids, like the system East Devon has procured.**

### **Website/internet Bidding**

The Review Group have tested the internet bidding system and listened to customers and staff refer to it use it during their shadowing at the Housing Advice Centres/ Local Authority office. Their observations of the systems are detailed in **Appendix 24**

The Review Group concluded that there are some areas that could be developed to make internet bidding easier to use but have found the website/internet bidding has several advantages over the other forms of bidding:

- It shows you what properties you are eligible for
- When you go to place a bid it shows you how many people are above you, this gives the customer the opportunity to weigh up where they would like to live and their chance of being successful.
- There is more information regarding each property on the website than in the property newsletter or available over the telephone.

The Task and Finish Group have carried out a review of the website and a full report on the findings can be found in **Communication section**

With regard to bidding via the website the guide to bidding could be improved to aid customers and in particular 'beginners' again this has been covered in **Communication section**

**The Task and Finish review recommended that the Homefinder Somerset Board:**

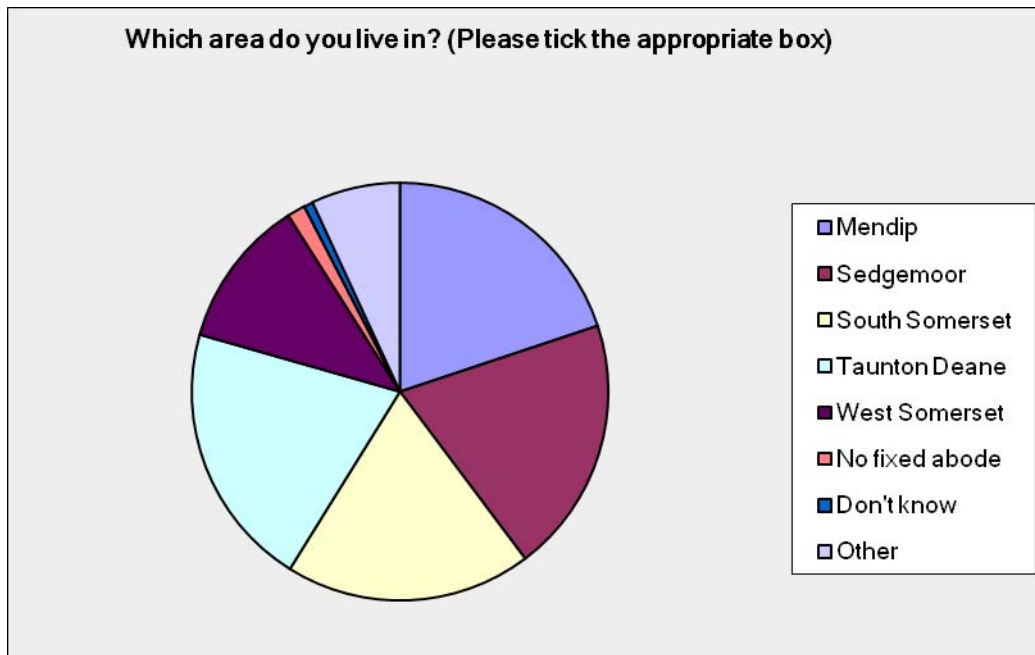
- a) Routinely consult with 'non IT Experts' and customers when there is a significant software update to test the guidance material and web pages before going live.**
- b) Look to use standard terminology to make it easier for customers to compare the properties advertised.**
- c) Monitor property descriptions for plain language to aid customers to effectively place bids and to prevent some customers placing inappropriate bids.**
- d) To consider replacing text where possible with symbols, for example where preference is given to those with a local connection or not suffering from any form of addiction.**
- e) Explore the possibility of having a dedicated telephone advisor to specifically assist customers who require assistance to access and look at the property advertisements on-line, and place a bid; the telephone number would only be displayed on appropriate web pages to prevent the number being misused.**

## 5. Evaluation of Homefinder Somerset Customer Service

The Review Group felt it was appropriate to measure how satisfied customers are with the service provided by Homefinder Somerset/Local Authorities and if appropriate seek ways to improve the customer experience. The Review Group consulted customers of the Homefinder Somerset partnership, front-line staff and the voluntary and charitable sector.

The Review Group compiled a survey that included specific questions regarding customer service. The survey was issued to a random 10 percent of people currently on the Homefinder Somerset Partnership register (ensuring that proportional numbers of customers across each Local Authority area were contacted). A good response was received across the county a breakdown of the response is shown in the spreadsheet and chart below:

Which area do you live in? (Please tick the appropriate box)		
Answer Options	Response Percent	Response Count
Mendip	19.9%	55
Sedgemoor	19.9%	55
South Somerset	19.1%	53
Taunton Deane	20.6%	57
West Somerset	11.6%	32
No fixed abode	1.4%	4
Don't know	0.7%	2
Other	6.9%	19
Other (please specify)		20
<i>answered question</i>		<b>277</b>
<i>skipped question</i>		<b>4</b>



The survey results showed that: local Council/ Homefinder Somerset Staff helped only 32.9% of the customers that needed help with their application form. More were helped by family and friends (33.5%) Full results can be seen in **Appendix 25**

The Review did not identify why the majority of people go to friends as apposed to staff for assistance. However it is felt that it is important that customers are made aware that assistance is available and how they might access it **See Communications section**

The Review Group asked customers 'Please say how satisfied or dissatisfied you are with the service provided by your Local Council housing team/Homefinder Somerset'. The full response is detailed in **Appendix 26**. The headline results show:

35.4% of respondents were less than satisfied with the overall customer service.

The greatest area of satisfaction was service at the local office with 54.3% satisfied or very satisfied.

The lowest area of satisfaction was access to information with 39.8% less than satisfied.

To ensure the customer satisfaction results were not adversely affected due to customers feeling dissatisfied as they had not been successful in obtaining a new home the Review Group also surveyed customers who had recently been successful in obtaining a new home through the scheme. The results of the same survey questions showed 57.6% were satisfied with overall customer service whereas 42.5% were less than satisfied. The full response is detailed in **Appendix 27**.

The Review Group are concerned with the current level of customer satisfaction and hope it can be improved upon. The conclusions of the Review Group having studied the survey results in conjunction with conducting shadowing at the housing Advice centres/reception areas and experiences from case work are as follows:

- The process and rules surrounding Choice Based Lettings need to be displayed in a clearer format to help manage customers' expectations.
- Customers need to be kept informed of anticipated waiting times for response to enquiries or application forms.
- Possible establishment of a customer focus group could be helpful to the Homefinder Somerset Board to identify and address areas of improvement.
- Nearly all customers of the scheme that completed the survey left their contact details agreeing to be contacted regarding the information they entered on their form this could be utilised to set up an initial working group or open forum.)

**The Task and Finish review group recommend that the Homefinder Somerset Board:**

- a) Publicise clearly the process that Homefinder Somerset applicants have to go through using a process map/pictorial diagram highlighting anticipated processing/waiting times based on target service standards as set out in the policy. See Appendix 12**
- b) Notify customers if for any reason the processing/waiting times will be in excess of targeted service standards with a re-assurance that customer service/satisfaction is of great importance to Homefinder Somerset.**
- c) Display on the website as of today's date or the week commencing date staff are processing applications / change of circumstances received on to keep the customer informed and minimise telephone enquiries.**
- d) If inconsistencies are identified in processing times across Local Authorities, particularly where an authority is not achieving the 21 days as set out in the policy look to share the workload across the partnership to ensure equality of service for Homefinder Somerset, please see Appendix 28 for a proposed draft agreement to enable this to be achieved.**
- e) If customers contact a Local Authority regarding Choice Based Letting, they should be asked how the service could be improved.**

- f) Set up a customer/stakeholder group to propose suggestions and evaluate potential solutions.**

### **Local Authority Area Satisfaction**

The Review Group analysed the customer satisfaction results by Local Authority Area to identify if any particular authority was achieving greater customer satisfaction to aid identifying areas of best practice. Full results broken down by Local Authority can be seen in **Appendix 29**.

The results show that Sedgemoor District Council has the greatest satisfaction for service at local office level, response to telephone enquiries and access to information and advice.

West Somerset has achieved the greatest satisfaction for response to letters and/or e-mails.

The overall satisfaction is very similar across all authorities except that of Taunton Deane. This result may have been affected, by the fact that Taunton Deane have their own housing stock, although this cannot be determined.

**The Task and Finish Review Group want to encourage service equality across the county and recommend:**

- a) Staff from each Local Authority partner look to shadow and learn from others particularly Sedgemoor regarding customer services working practices to identify and implement best practice to improve customer satisfaction.**

The Review Group have captured suggestions from front-line staff and the voluntary and charitable sector regarding how internal systems and procedures could be improved to potentially improve customer service and therefore satisfaction. The Review Group recommends that the Homefinder Somerset Board consider these suggestions, **See Appendix 30**



## **6. Review of Advertising/ Homefinder Somerset profile**

The Task and Finish reviews objective was to ensure that Homefinder Somerset was accessible to all and therefore needed to identify if people were aware of Homefinder Somerset and if not where they would look to go for housing advice to identify potential sites for signposting.

The Review Group conducted a mystery shopping exercise in conjunction with local school children. They were asked to find information regarding housing in the local area, on the internet and in local papers. They did not find anything that made reference to or gave details specifically about Homefinder Somerset. The Review Group felt that it needed to identify how widely known the Homefinder Somerset scheme is and where people would go for Housing Advice to truly identify if there is adequate advertising to ensure the scheme is accessible for all.

The Review Group carried out surveys to identify:

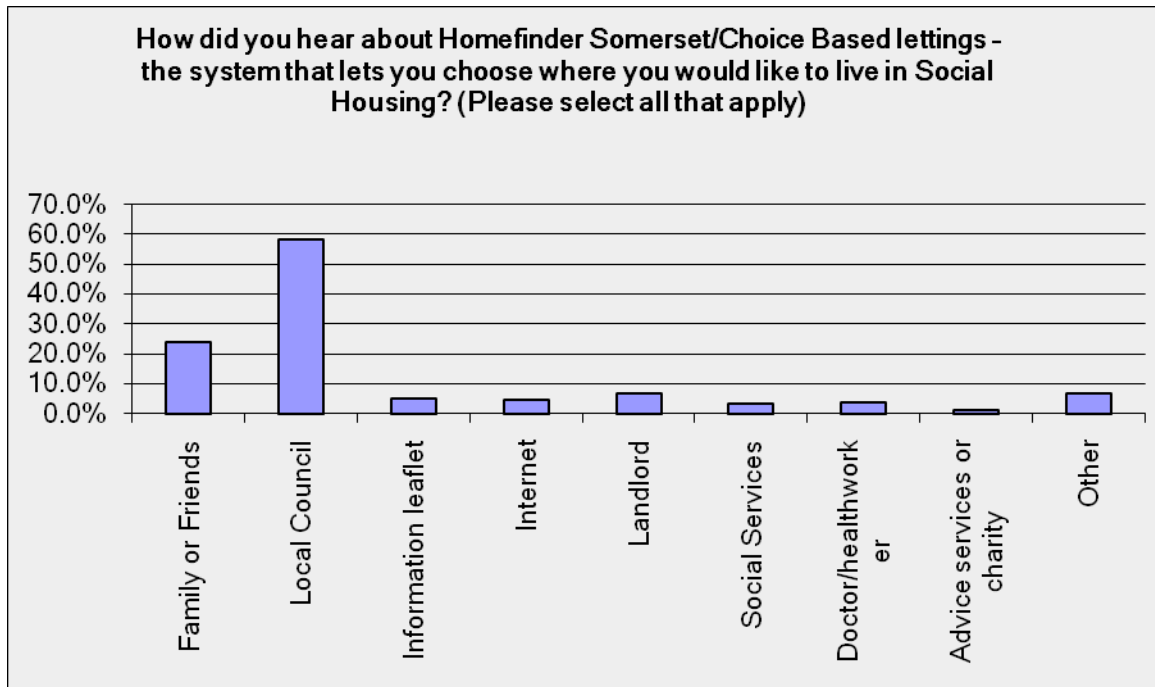
- How existing customers of the scheme became aware of Homefinder Somerset.
- If the general public are aware of Homefinder Somerset.
- Where people would look to go for housing advice if they found themselves in need of a home.
- If local voluntary and charitable organisations are receiving housing based enquires.

The results of the surveys are detailed below:

### **Existing Customers**

The chart below shows that the majority of customers were made aware of Homefinder Somerset through their Local Council. This result may have been due to the number of people who were advised to re-register. 24 % of people found out about the scheme from family or friends.

The review feel that this method cannot be relied upon and would like to have seen higher results in the other options and feel this is an area that needs to be further explored.



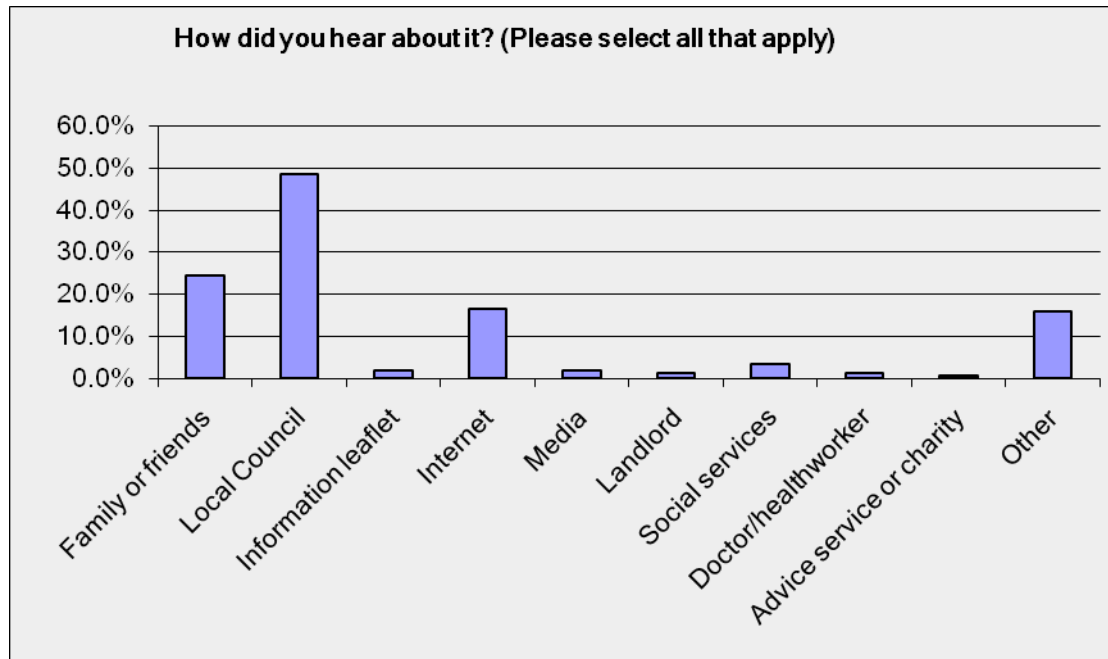
### General Public

The survey of the general public was conducted across the County at the following sites:

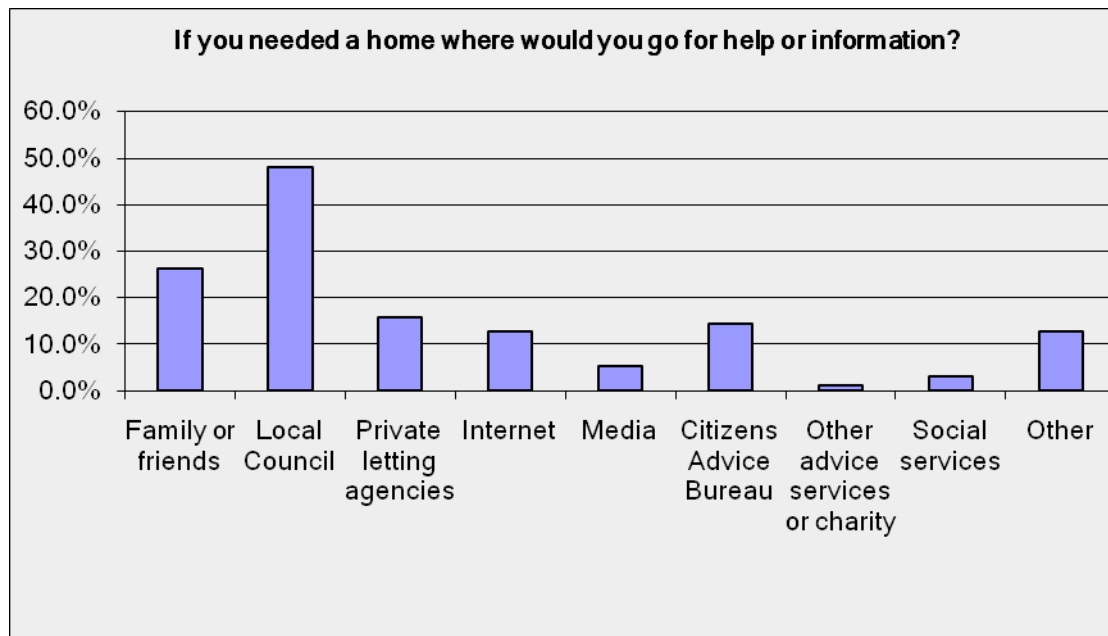
- Asda Bridgwater
- Asda Frome
- Asda Taunton
- Chard
- Coleford
- Crewkerne
- Martock
- Shepton Mallet
- Street
- Wells
- Williton
- Wincanton
- Yeovil

A total of 491 people across the county answered the survey and of those surveyed 69% said they did not know what Homefinder Somerset was. This result is disappointing but not surprising given no specific advertising campaigns have been carried out.

The 31% of respondents that said they did know what Homefinder Somerset was and again identified the Local Council as the main source of information, followed by family and friends. See below for full results:



The respondents that were not aware of Homefinder Somerset were asked where they would look to go for help or information if they needed a home, the results are shown below:



Although the result is encouraging as it shows 48.2% of people would look to go to the correct place. The Review Group are concerned that people who opted to seek information from the other named sources above may not get directed to their Local

Council and as a consequence not receive the help and advice that they need. It is therefore imperative to analyse the other options further:

People who answered Internet or media were asked to provide specific examples. The responses provided are summarised as follows:

Local newspaper

Right Move

Google

Letting agents' websites

People who answered Other or Other advice services or charity were asked to provide specific examples. The responses provided are summarised as follows:

YMCA

Registered Social Landlord partners

Royal British Legion

Connexions

Yellow Pages

Help the Aged

I Don't know

The Review Group concluded:

The above named organisations should be contacted and offered an overview of Homefinder Somerset and provided with guidance material and application packs for distribution to people who require housing advice.

The above mentioned paper publications be explored to see how appropriate it may be to place a advert promoting Homefinder Somerset.

That links from Google are put in place, this has been further explored in **Communication section.**

The scheme needs to be advertised where people will see the adverts in everyday life, to ensure the scheme is promoted to all sectors of the community and does not discriminate based on access to technology or access to newspapers.

### **Local Voluntary and Charitable Organisations**

90.9% of the local voluntary and charitable sectors that responded to the survey said they received enquiries regarding housing and/or homelessness. Seven organisations said they receive between 1 and 4 per week and one said they received between 11 and 15 enquiries. Worryingly in response to the question ‘

Please tell us where you refer people for Housing Advice?' The Citizens Advice Bureau and Local Council came out as equal with Registered Social Landlords and Shelter also being mentioned. This demonstrates that Homefinder Somerset needs to promote itself and its role with the local voluntary and charitable organisations to ensure together they will efficiently assist those people in need making the scheme accessible.

Further information regarding the voluntary and charitable organisations will be provided to the Board as a separate document.

**The Task and Finish review recommends that the Homefinder Somerset Board:**

- a) Creates a poster detailing what Homefinder Somerset is, how to register and apply and where to go for further information/advice.**
- b) Explores the potential of displaying promotional posters in waiting areas across the health care sector in Somerset.**
- c) Advertises in the free local newspapers on a periodic basis.**
- d) Hosts an awareness day for local voluntary and charitable organisations to promote the Homefinder Scheme and to look to develop a relationship where the organisations work together effectively to distribute housing advice, application forms and appropriate guidance material.**

### **Choice Based Lettings Partnership Research**

The review group have looked at several Choice Based Lettings partnerships across the country to identify potential exemplars with regard to advertising of the scheme. Unfortunately conducting this exercise over the Internet proved to be very restrictive however an excellent piece for advertising places of assistance with bidding and free internet access was discovered, **see Appendix 31**

**The Task and Finish Review Group recommends that the Homefinder Somerset Board:**

- a) Produce an equivalent of the Hackney Choice Access points for Somerset including access to free telephone facilities/local offices. This document should be distributed with a guide to bidding and displayed at all local offices as a minimum.**

For information all libraries with free internet access are listed on Somerset County Councils Website, all the internet access points at Local Authority offices **are attached in Appendix 32**

In addition there are many community facilities, supported by local authority grants, that also provide free internet access if an agreement could be reached to enable these to be included it would increase the accessibility for all.

## **7. Statistics and Benchmarking**

The Task and Finish Review Group have reviewed statistical information from varying sources to:

- Measure how well Homefinder Somerset is performing.
- To identify areas of weakness
- To see if Homefinder Somerset is achieving what it set out to do – improved efficiency, fewer voids, and greater customer choice.
- To collect baseline data, a pre-review measure.

The review group have analysed data from the following sources:

- Individual Local Authorities
- Landlord Homefinder Partners
- Homefinder Somerset Monitoring Board
- Core/National Indicators

### **Individual Local Authorities**

The Task and Finish Review hoped to identify a decrease in the number of people in temporary accommodation but on looking at this statistic (NI156 households living in temporary accommodation) in conjunction the reasons as to why it is sometimes necessary to utilise this method it was felt this would not be an affective indicator to gauge the success of CBL/Homefinder Somerset especially with regard to accessibility.

### **Landlord Homefinder Partners**

The review issued a survey to Landlord partners of Homefinder Somerset, as part of the survey which sought to obtain data specific to the Somerset area regarding:

Housing Stock since 2007/08

Void Times since 2007/08

New Lets and Re-lets since 2007/08

The Review was looking for key indicators to assess how well Homefinder Somerset was working as a Choice Based Lettings scheme and for the residents of Somerset. The indicators the review were hoping to identify to demonstrate the scheme was successful are as follows:

1. Static or increasing Housing Stock
2. A decrease in Void Times
3. An increase in New lets and Re-lets

Unfortunately only three Landlord partners provided the data. The main reason for not providing data is because of the complexities of extracting the data specific to an area for Landlords covering multiple areas.

From the responses that were received the Review Group have determined:

- The first indicator was proven to be positive as two of the three landlords had increased their housing stock in Somerset and the third had remained static since 2008/09.
- The second indicator was encouraging but was not conclusive. Two full replies were received and both demonstrated a significant decrease in 2008/09 followed by an increase in 2009/10 but overall there had still been a decrease.
- The third indicator for new lets had no pattern. Only one landlord had provided measurable data for re-lets which did show a year on year increase.

From the figures that have been provided it is impossible to quantify the success of Homefinder Somerset using these indicators or to compare it with other schemes.

### **Homefinder Somerset Monitoring Board statistics**

The review group analysed the statistics that are monitored by the Homefinder Somerset Board and concluded:

- The number of accepted offers was low compared with numbers on the list. However the figures were far more encouraging when compared to active applicants less those customers that have not bid. This has raises the following questions/concerns:
  - Why are there are so many in-active applicants when customers are required to provide information/complete new forms in a relatively short time period and it is in the customers interest to do this; to ensure they are in the appropriate band and be able to bid for properties?
  - Why are so many customers not bidding? Several reasons have been identified using the responses from the customer survey, these have been captured in the **Bidding section, page 42**

The Review Group are disappointed that Homefinder Somerset are not currently monitoring these cases more actively to potentially identify vulnerable customers.

The number of customers rejecting offers from Taunton Deane Borough Council seems very disproportionate compared to other landlords in the partnership and suggests that either the property adverts are not accurate or customers are bidding for properties in the Taunton Area that they do not actually intend to move to. **see Appendix 33**

The skipping reasons by landlord, show that either the advert is not clear or customers are not reading the full advert or are not able to understand the information provided. For example there are a considerable number of customers being skipped for reasons such as 'Fails to meet accommodation criteria' and 'requires ground floor'. The Mendip review group are concerned that the 'Fails to meet accommodation criteria' is being used as a generic term and this could lead to a lack of transparency.

There is inadequate information to identify if Homefinder Somerset is processing/banding applications in accordance with the 21 days set out in the Common Lettings policy and in the application form. It is possible to identify from the Monitoring Board statistics how many of the applications that had been received have been banded, the percentages have varied considerably over the last year and between the different Local Authorities. The review group are concerned that the last available statistics (May 2010 as at September 2010) show that South Somerset District Council in particular had 372 applications that had not been banded. The principal concern of the review is equality of service to all customers across Somerset and Customer satisfaction.

**Suggestions and recommendations regarding processing times and customer service have been covered in detail in the Evaluation of Homefinder Somerset customer service section of this report customer satisfaction report**

The Bidding Statistics are not meaningful as it shows the total number of bids placed. It would be more useful to see how many people had placed 0, 1, 2 or 3 bids and in particular if a statistic could be provided to identify those people:

- who had not placed a bid,
- why they had not done so
- if they had looked at or listened to the properties that are available.

Bidding figures alone do not show if the scheme is effective and/or accessible for customers. The Review has identified that some customers and a charitable organisation in Yeovil were under the impression that if an individual were to bid routinely for three properties it would help them to be get a new home more quickly!

**Appendix 34**

- In terms of assessing if the scheme is achieving it would be useful for the Board to monitor the numbers of people successfully downsizing.
- There are no statistics that measure how accessible the scheme is/ the numbers of people experiencing problems applying or bidding.
- From a customer perspective it would be nice to have clear service standards/targets for the Homefinder Somerset Partnership that the partnership measures its performance against on a regular basis



The Task and Finish Review recommend that the Homefinder Somerset Board:

- a) **Monitor the amount of time cases are suspended for and ensure follow up procedures are adhered to.**
- b) **Monitor how long it is taking for changes of circumstances to be processed by Local Authorities.**
- c) **Works with Taunton Deane Borough Council to:**
  - **Make sure the property adverts are accurate and all relevant information is detailed for customers looking to move.**
  - **To monitor the number of rejected offers by customers and conducts a further investigation with the landlord if the rejected figures do not reduce considerably to a comparable level of the other landlords.**
- d) **Looks to develop a method of capturing processing/waiting times with Abritas or a manual approach with the Local Authorities to make sure reasonable equality of service is provided across the partnership and the targets quoted in the policy and documentation are adhered to**
- e) **Reconsider what statistics are effectively assisting it to make sure the scheme is delivering what the partnership intended, strives to achieve in the future and makes sure the scheme is accessible for all. In particular the Board consider:**
  - **Monitoring the number of people who have successfully downsized (Details regarding the number of people successfully downsizing can be obtained by looking at the number of people that were under occupying that have now moved, then it can be traced back to see what band they were in)**
  - **Benchmarking, using comparative figures from a similar sized partnership.**
  - **Monitoring the number of banding appeals received, particularly those where the appeal has been put forward due to misinterpretation of the policy. This should be monitored to review the wording of the policy using the customers' perspective.**
  - **Monitoring the number of applications that are received incomplete and what further information is required to process them and help identify areas of weakness in the application form and or supporting documentation.**
  - **Asking partners to routinely log the number and type of enquires received and categorise them as Unavoidable/Avoidable**

**contact/Frequently Asked Questions to assist the Board to identify any potential weaknesses in the scheme in terms of accessibility and efficiency and seek ways to address them.**