Training and Information for Tenants

GOOD PRACTICE IN HOUSING MANAGEMENT

GUIDELINES FOR SOCIAL HOUSING PROVIDERS

THE
HOUSING UNIT

Good Practice in Housing Management

Guidelines for Social Housing Providers

TRAINING AND INFORMATION FOR TENANTS

Produced in conjunction with

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Contents

FOREWORD

Over the past two decades the task of managing local authority housing has become more challenging from a range of perspectives. Although living standards in Ireland have generally improved over this period, the level of dependence on social welfare benefits among tenants of public housing has remained stubbornly high and significant problems of criminal and anti-social behaviour have developed on some estates. Residents of local authority estates have also begun to demand a greater say in the management of the areas in which they live and like most modern consumers have developed higher expectations about the standards of service which they should receive from their local authority. At the same time, management practices within the public sector have changed dramatically, and Department of the Environment, Heritage and Local Government statements of policy on housing have repeatedly exhorted local authorities to reform their traditional practices so that they can meet the new challenges of public housing management and keep in step with this wider reform process.

The establishment of the Housing Management Group in 1996 and the publication of its two reports in 1996 and 1998 marked a watershed in the development of local authority housing management practice in Ireland. These reports sketch out the broad framework that this reform process should follow. In the *First Report*, the Housing Management Group makes a series of recommendations in relation to housing management systems, tenancy matters, repairs and maintenance, lettings, rents and tenant participation – all of which are intended to help local authorities achieve good practice in housing management. On the basis of the recommendations of its *Second Report*, the Housing Unit was established in order to continue and develop the work commenced by the Housing Management Group in identifying good practice in housing management.

These good practice guidelines build on the reform framework which is outlined in the Housing Management Group reports, and extend it to include voluntary and co-operative housing organisations which have become increasingly important providers of social housing during the last decade. The guidelines provide more in-depth guidance on the steps that social housing providers should implement in order to achieve good practice in the various aspects of their housing management function. Furthermore, the guidelines suggest

a wide range of actions which, depending on their individual circumstances and resources, social housing providers may strive to implement in order to achieve best practice in housing management.

The guidelines are intended to be a practical working tool for social housing managers and, with this in mind, the guidelines have been laid out in a user-friendly style, drawing on practical examples of reforms that have been put in place in different authorities around the country, and they provide checklists of the different stages that should be followed in implementing good practice. In the development of these guidelines, every effort has also been made to strike a balance between being overly general and overly prescriptive. Each social housing provider must decide on its own approach, having regard to the size and type of housing stock, the level of housing policy development, and the changing nature of the local housing environment. Some aspects of the guidelines will only apply to the larger social housing providers, with complex staffing structures; other parts are more relevant to smaller organisations with a more dispersed stock of dwellings. However, it is hoped that all social housing managers will find in them some suggestions which they can use in their own organisation.

These guidelines draw on an extensive process of consultation with local authority housing practitioners across the country. This consultation was carried out by the Housing Unit staff and through the medium of the five Regional Housing Practitioner Networks which were established in 1998 in order to facilitate the exchange of ideas on good practice among local authority housing staff. The compilation of the good practice manuals was directed by a sub-committee of the Housing Unit Consultative committee, which is made up of representatives of key stakeholders in social housing in Ireland including representatives of the voluntary and co-operative housing sector. The details of the process of compiling these guidelines are included in the acknowledgements to this document.

Michelle Norris
Director
The Housing Unit

Summary: key issues to consider in achieving good practice

General Approach

Where is this issue examined in the *Guidelines*?

Achieving good practice in the provision of training and information for tenants involves five key steps.

These are:

1. Devise a strategic plan with clear aims and objectives to achieve good practice in the provision of training and information for tenants

    ◆ Sections Two, Three and Four

2. Review current training and information provision in conjunction with tenants to establish current practice and provision in the area

    ◆ Section Two

3. Devise a training and information programme which meets the needs of tenants and is inclusive in regards to participation

    ◆ Sections Two, Three and Four

4. Monitor and evaluate provision and success of the strategy

    ◆ Sections Two, Three, Four and Five

5. Implement any necessary changes.

    ◆ All Sections

Key Issues

In order to achieve good practice in this aspect of housing management the following issues should also be taken into consideration:

–   The development of a training and information strategy has numerous positive benefits for both the social housing provider and tenants alike, not least the development of increased levels of communication and trust.

    ◆ Section 2.1

–   The overall purpose of the training and information strategy must be made clear to both tenants and staff to ensure all communication is effective, efficient and beneficial.

    ◆ Section 2.1

–   Performance indicators must be set to facilitate measurement of service standards year-on-year, to ensure inclusive participation is being achieved and that levels of tenant satisfaction are being consistently measured.

    ◆ Sections 2.2, 4.2

– Performance should be monitored against the objectives set within the training and information provision strategy. ◆ Section 2.2

– The development and implementation of a communications strategy is important as it can assist the social housing provider develop a consistent approach to all types of communication with tenants whilst also defining a process for policy development and service improvement. ◆ Section 2.3

– Complaints procedures should be devised and publicised by all social housing providers. Staff and tenants should be encouraged to see this initiative as a positive departure whereby tenants are encouraged to provide feedback on service standards provided and how these might be improved. ◆ Sections 2.3 and 4.2

– Training selected for provision should be done in conjunction with tenants and further to a needs assessment. ◆ Sections 3.1 and 4.2

– Accessibility issues are of paramount importance in relation to training and information provision. These can include physical accessibility in relation to buildings and also accessibility in terms of being able to read and understand material and training provided. ◆ Section 3.1.2, 4.1, 4.2, 4.3 and Section 5

– It is important that all information and training provided to social housing tenants is standardised and, as such, is easily recognisable, understood and useful. ◆ Sections 2.3, 3.1.2 and 4.2

– It is necessary that all training and information provision is monitored in relation to equality and whether it is inclusive of all sections of the tenant population. Complaints and suggestions made by different ethnic groups should be monitored and reviewed to ensure that practices can be updated and mechanisms employed to encourage under-represented groups to participate fully in training provision and tenant participation initiatives. ◆ Sections 3.1.2, 3.1.3, 4.2, 5.1, 5.2, 5.3 and 5.4

– It is important to carry out impact assessments in relation to training and information provision to ensure that less obvious benefits of these programmes are noted. ◆ Section 3.1.3

– It is fundamental to an effective training and information strategy that tenant satisfaction of these services is monitored. One way in which this can be carried out is through the use of tenant satisfaction surveys. ◆ Sections 3.1.3, 4.1 and 4.2

– Finally, the social housing provider must ensure that tenants receive feedback whether it be in regard to performance developments or progress on various initiatives. This is particularly important where training is directly linked to tenant involvement in policy development and service delivery. In these cases the housing provider needs to report back on how tenants' input has reflected changes in service delivery practice and processes. Feedback can be provided by mechanisms such as performance reports in newsletters and also annual reports. ◆ Section 3.1.3

Other Publications from The Housing Unit

GOOD PRACTICE GUIDELINES

Brennan, B. (2000),
*Good Practice in Housing Management:
Guidelines for Local Authorities –
Repair and Maintenance of Dwellings*,
Dublin, Housing Unit.

Clarke, J. and Norris M. (2001),
*Good Practice in Housing Management:
Guidelines for Local Authorities –
Rent Assessment, Collection, Accounting
and Arrears Control*,
Dublin, Housing Unit.

Moran, J. (2003),
*Good Practice in Housing Management:
Guidelines for Local Authorities –
Housing Refugees*,
Dublin, Housing Unit.

Norris, M. (2001),
*Good Practice in Housing Management:
Guidelines for Local Authorities –
Managing Voids: Co-ordinating the
Monitoring, Repair and Allocation of
Vacant Dwellings*,
Dublin, Housing Unit.

Norris, M. (ed) (2001),
*Good Practice in Housing Management:
Guidelines for Local Authorities –
Managing in Partnership: Enabling
Tenant Participation in Housing Estate
Management,*
Dublin, Housing Unit.

Norris, M. (2003),
*Good Practice in Housing Management:
Guidelines for Local Authorities –
Preventing and Combating Anti-Social
Behaviour*,
Dublin, Housing Unit.

HOUSING RESEARCH SERIES

Brooke, S. and Norris, M. (2002),
*The Housing Management Initiatives
Grants Scheme: An Evaluation*,
Dublin, Housing Unit.

Murray, K. and Norris, M. (2002),
*Profile of Households Accommodated by
Dublin City Council: Analysis of Socio-
Demographic, Income and Spatial
Patterns*,
Dublin, Housing Unit.

In 2001, the Housing Unit published the good practice guidelines *entitled Managing in Partnership: Enabling Tenant Participation in Housing Estate Management.* The document focused on strategic management, implementation and evaluation of projects to enable tenants to participate in housing management. This edition of the good practice guidelines series builds on these issues as it centres upon the complementary themes of the provision of effective training and information for tenants.

Ensuring that tenants are well-informed about the services they receive or that are available to them can have many positive benefits for social housing providers in numerous aspects of their work. This includes: reduction in rent arrears, combating anti-social behaviour and vandalism, reduced management costs and, crucially, increased tenant satisfaction. On the other hand, failure to provide good quality training and information for tenants can lead to less effective management and difficulties in tenancy, void and lettings management, and can make dealing with anti-social behaviour more difficult. It can also lead to a feeling of exclusion or alienation for tenants. The benefit of fully involving and informing tenants arguably outweighs any costs to be incurred by social housing providers, both in terms of customer satisfaction and service provision.

Section One of these good practice guidelines highlights why the provision of training and information for tenants is a fundamental housing management task: it outlines the challenges that social housing providers must overcome, and the issues and policies they should consider if they are to improve the effectiveness of this aspect of the housing management service. On the basis of this discussion, objectives are identified and priorities for action are outlined in order to achieve good practice in the provision of training and information for social housing tenants.

INTRODUCTION

1·1 FOCUS OF THESE GUIDELINES

Previous editions of these guidelines have focused specifically on the management of social housing provided by local authorities. This edition of the guidelines addresses all social housing providers, including local authorities and voluntary and co-operative housing organisations. Where discussion refers to all of these agencies the term 'social housing providers' or 'housing providers' is used. Where the guidelines refer to one of these groups independently it is noted in the text and these instances occur largely where legislation does not universally apply to all social housing providers. In addition, it should also be noted that in the case of housing co-operatives the tenants are shareholders in the co-operatives and are represented on the management boards of directors.

1·2 THE IMPORTANCE OF GOOD PRACTICE IN THE PROVISION OF INFORMATION AND TRAINING FOR TENANTS

Increased interest in tenant participation in housing management on the part of central government and social housing providers can be attributed to growing demands from tenants for consultation in decisions regarding the management of the estates in which they live. The advent of these demands in turn reflects

the wider growth in community development activity, as well as concerns among tenants over the need for efficient and effective management of issues which include the maintenance of dwellings and the combating of anti-social behaviour.

It clearly follows that, if optimal tenant participation is to be achieved and tenants are to be fully engaged in this process, the provision of information and training for tenants is essential. Such input effectively empowers them to become more involved in the development of housing policy and procedures which improve service standards and ensure that service delivery better reflects the needs of tenants.

The report *Delivering Value for People*, published by the Department of the Environment, Heritage and Local Government (DoEHLG) in January 2004, recognised that the publishing of information and data should not be an end in itself but a tool to enable local authorities to identify where:

◆ there may be problem areas; reasons for poor performance would need to be identified, analysed and follow-up action pursued

◆ good practice can be shared through the identification of consistently good performance in certain service areas and identification of the factors or practices believed to be contributing to this.

These guidelines are intended to help social housing providers build upon the good practice guidance contained in *Managing in Partnership – Enabling Tenant Participation in Housing Estate Management* which focuses principally on the management procedures and supports that should be put in place in order to facilitate and enable increased tenant involvement. These guidelines on *Training and Information for Tenants* will enable social housing providers to put in place the arrangements for training and information provision which are necessary to enable tenants to participate in housing management.

1·3 **Achieving Good Practice in Training and Information Provision for Tenants: Issues for Consideration**

Achieving good practice in the provision of information and training for tenants is an important and challenging task for social housing providers and many issues need to be considered in the development of policies and programmes to improve practice in these areas. Some issues and policies are relevant only to the training of tenants; others apply to the wider housing service and indeed to the entire organisation and services provided.

Any plans to improve the provision of training and information for tenants should take into account the following macro issues as they apply to the organisation.

◆ The Strategic Management Initiative (SMI) identifies as the key aims of public sector reform the issues of maximising the contribution of public bodies including local authorities, to social and economic development, providing an excellent service to the public and ensuring the efficient use of resources. Furthermore, under the terms of the SMI a range of priority actions to achieve these aims are identified. These priority actions include: delivering quality services to customers and clients; reducing 'red tape'; delegating authority and accountability; improving financial management and ensuring value for money; enhancing the use of new technology and improving co-ordination between public agencies.

◆ The SMI also identifies the establishment of systems of performance monitoring as the key to achieving good practice in public sector management and the DoEHLG circular LG 9/00 instructs local authorities to monitor their performance in a range of services. The extent of services to be monitored was then expanded in 2004 in *Delivering Value for People – Service Indicators in Local Authorities.* Five of the forty-two national service indicators laid down apply to housing management services.

◆ Therefore, the identification of a set of performance indicators as the basis for assessing the quality of the service and to inform strategic management decisions should be a central element of any proposed strategy to achieve good practice in relation to the provision of training and information for tenants whether by local authorities or by voluntary and co-operative housing providers. Indicators should be selected carefully to reflect standards on performance monitoring, be related to the specific local needs and requirements of each social housing

provider, include provision for assessing customer satisfaction and addressing customer complaints and be regularly reviewed, updated and monitored to meet changing conditions and circumstances of both the housing provider and its tenant population.

◆ Management information systems should be established by all social housing providers in order to collate all of the information necessary for performance measurement. This management information system should relate directly to the chosen performance indicators; be easily collected, readily collated, clearly presented, and regularly reviewed; aid problem solving and decision-making and assist in policy formation. Training and information management systems must be linked to tenant participation management information systems and, also, ideally to the information systems relating to the other main elements of the housing service, e.g. tenancy updates, rents, lettings, finance and maintenance.

◆ A number of recent legislative developments have implications for the management information systems of social housing providers, particularly local authorities. These pieces of legislation should be considered and adhered to by all social housing providers. The Freedom of Information Act 1997, as amended, affords members of the public the right to obtain information held by government departments and public bodies, the right to obtain reasons for decisions affecting oneself, and the right to have official information relating to oneself amended where it is incorrect, incomplete or misleading. Furthermore, the Data Protection Act 1998 grants members of the public additional rights in relation to personal information stored on computer and creates new obligations for those keeping personal information on computer.

A range of recent developments which have impacted on the entire local authority housing service and some of which impact upon voluntary and co-operative housing providers also have implications for the provision of training and information for tenants. These include the following:

◆ The programme for the reform of the management of local authorities, particularly the establishment of Strategic Policy Committees (SPCs), to develop policy on each of the main local government functional areas. In most cases this

process has included the establishment of a Strategic Policy Committee that focuses on the housing area and is supported by a Director of Housing Services. To ensure that local authorities are aware of the impact of existing policies on tenants, there needs to be an effective flow of information between tenants, staff and committee members. Equally, however, it is vital that mechanisms are in place to enable tenants to become involved in the development of policies that can improve service efficiency and ensure that policies better meet the needs of the local community.

◆ The recent expansion of the remit of the National Anti-Poverty Strategy (NAPS) to include local authorities. This has obvious implications for housing management, since local authority tenants are more likely to be living in poverty than any other section of the population. Under the terms of the NAPS, public agencies are required to 'poverty proof' their services, i.e. to ensure that they do not create or perpetuate existing inequalities and that they contribute to achieving a fairer distribution of resources and opportunities.

◆ The provisions of the Housing (Traveller Accommodation) Act 1998. This legislation requires local authorities to prepare and adopt five-year Traveller accommodation programmes that provide for the supply of adequate accommodation for Traveller families living within their functional areas. These programmes should plan to meet the full range of Traveller accommodation needs, including: standard housing, group housing schemes and halting sites, and should make provision for the management of these different accommodation types. To advise on the preparation of each programme, the 1998 Act also requires local authorities to set up Local Traveller Accommodation Consultative Committees consisting of Traveller representatives and local authority elected members and officials.

◆ The provisions of the Equal Status Act 2000. This legislation outlaws discrimination in a range of areas including employment and the provision of goods and services and other opportunities to which the public generally have access, including housing services. Discrimination is described in the Act as the treatment of a person in a less favourable way than another person is, has been or would be treated. Nine distinct grounds for discrimination are identified:

gender, marital status, family status, age, disability, race, sexual orientation, religious belief and membership of the Traveller Community. The Act also specifies that social housing providers have a duty to accommodate the needs of a person with a disability by providing special treatment or facilities, if without these arrangements it would be impossible, or unduly difficult, for the person to avail himself or herself of the service. This legislation must be borne in mind when considering the provision of training and information for tenants.

◆ Part V of the Planning and Development Act 2000. Under the terms of this legislation local authorities can require that up to 20 per cent of new residential developments is employed to meet social and affordable housing needs. As a result of this measure, in the future increasing amounts of social housing will be situated in multi-tenure estates which could incorporate a mix of the following housing tenures: social housing provided by local authorities and/or by voluntary and co-operative housing providers, private rented housing and owner-occupied housing.

◆ The Official Languages Act 2003 which aims to ensure better availability and a higher standard of public services through Irish, this includes services provided by local authorities.

◆ Since May 2000 the DoEHLG has required local authorities to monitor their performance across a range of services, using a variety of performance indicators, including an assessment of customer satisfaction. A working group was also established by the DoEHLG in May 2003 to examine the operation of customer service initiatives in local authorities, consider developments to date and make recommendations for the advancement of the use of service performance indicators. However, the working group found that, while an increasing number of local authorities are providing information and reporting to tenants on service performance, this information is not always useful or easily understood by the public.

◆ The housing policy statements *A Plan for Social Housing and Social Housing – The Way Ahead*. These statements were published by the DoEHLG in 1991 and 1995 respectively and both recommend the need for increased tenant

participation in more localised housing management structures. Many initiatives of this type were pioneered by voluntary and co-operative housing providers and their widespread use by local authorities has seen the transformation of traditional housing management practices in this sector. The changing roles of tenants and the effective management of the tenant involvement process demand a wide range of skills from housing practitioners and an increased accountability to the customer. The provision of effective and timely training and information such as an annual report, showing how the organisation is performing – both against its service standards and in terms of tenant satisfaction – can facilitate this process, increasing accountability and ensuring that tenants receive the service improvements they desire.

◆   The Programme for Prosperity and Fairness (PPF). This national agreement required local authorities to produce Customer Action Plans by March 2001. Customer Action Plans clearly set out each local authority's objective in relation to improving customer service and how it plans to achieve it. The Customer Action Plan forms part of the local authority's wider corporate plan and has a strong strategic focus. The scope and impact of the PPF is important in the context of the provision of information and training to tenants, as the programme requires the setting of challenging service standards in consultation with the customer. A prerequisite of such an approach is therefore effective engagement with tenants, requiring the provision of information that is user-friendly and tailored to obtain specific data relevant to individual areas of service delivery.

Finally, in developing programmes of good practice, social housing providers should also take into account the following issues which are particularly relevant to the task of providing training and information for tenants:

◆   The Housing Management Group's report, published in 1996, identifies the lack of effective co-ordination between different housing services and functions as one of the main obstacles to achieving good housing management practice in the local authority sector.

◆   It is frequently those in receipt of housing services such as tenants themselves who are best placed to identify gaps in service co-ordination and delivery, and

they are also uniquely placed to put forward suggestions on how to improve services and achieve the delivery of an efficient and effective service. The challenge lies in identifying the most effective and appropriate mechanisms to gather objective and constructive views, encourage suggestions and improve service quality and levels of satisfaction.

◆ All information and training provided to tenants must meet pre-determined aims and standards in order to ensure consistency in provision, quality and relevance. Consistency is particularly important in the following areas:
   – Standards of training and information provided
   – What measures are used to assess how well the information and training that is currently available is meeting tenants' needs and fulfilling the objectives of the information/training itself, i.e. is it working?
   – Analysis of feedback from tenants in respect of information and training provided
   – Presentation of findings of feedback to tenants
   – Ensuring that emergent themes are reflected upon by the housing provider in terms of changes to service delivery and training and information provision.

◆ Performance indicators and standards relating to the provision of training and information also need to be consistent with customer action plans and the wider corporate objectives of the organisation.

◆ At the same time there is also a need for flexibility in the design of training and information programmes. This work needs to be tailored to meet specific local needs. Consequently, performance indicators, standards and targets for training and information programmes should reflect this requirement.

◆ Training is a continual and ongoing process and, as such, requires regular monitoring and review to ensure that the content of all training and information remains up to date and reflects changes in legislation and good practice.

◆ The success of training is more complex to quantify but nonetheless standards need to be developed and evaluation mechanisms implemented to consider three key areas:

- Feedback from those tenants who have attended training courses
- The impact of the training on the recipients and the resulting impact in terms of how the skills learned have been implemented
- The impact and benefits for the social housing provider.

◆ The provision of training and information which encourages the involvement of tenants in decisions around service delivery, policy and procedures changes the nature of the relationship between social housing providers and tenants because it involves the joint evaluation of the housing management service by both parties.

◆ It is essential to ensure that all tenants have access to relevant information and training provision should they wish to avail of these. Efforts should be made to ensure that under-represented groups such as members of Black and Minority Ethnic (BME) communities, Travellers, older people, homeless people and people with particular needs or disabilities avail of these services, thereby attempting to ensure that tenant involvement in decision-making processes and the development of housing policy addresses the needs of the whole community.

◆ The tenants groups consulted during the compilation of these guidelines recommended that social housing providers should put more information in writing, particularly in relation to policies that directly affect tenants, e.g. allocations and transfers. In particular they highlighted the need to explain how housing management decisions are made and the rights and responsibilities of both social housing providers and tenants.

◆ At the same time, the provision of too much information can result in a lessening of its overall impact.

◆ An evaluation of the existing provision of training as well as the mechanisms in place for assessing training needs in order to establish their relevance, usefulness, and quality needs to be undertaken to establish its frequency (of both distribution and updating), content, relevance and quality. This process should include an evaluation of standard information distributed automatically to tenants such as pre-tenancy documentation.

◆ Evaluation mechanisms for both training and information provision need to consider issues related to the role of information and training provision in tackling social exclusion and promoting community cohesion and inclusion of under-represented groups. This evaluation will need to include the availability of information in jargon-free language, large print, audio, Braille and translation into other prevalent languages spoken by the social housing providers' tenants.

1·4 **AIMS AND OBJECTIVES OF GOOD PRACTICE IN INFORMATION AND TRAINING FOR TENANTS**

The primary purpose of these guidelines is to help social housing providers provide accessible and effective training and information for tenants, by suggesting the best methods of communicating information to tenants and by providing targeted training to help individuals, tenants, residents groups and community organisations have a clear understanding of housing management practice.

The guidelines are also designed to inform social housing providers, officers and staff of the policy background to, and the importance of, effective provision of training and information for tenants and to enable the development of local strategies in relation to such provision.

Furthermore, these guidelines are intended to help social housing providers develop strategies in the provision of training and information for tenants which will achieve the following objectives:

◆ Achieve high standards in customer care and ensure accountability to the customer in the management of the service

◆ Achieve value for money for all expenditure on the service

◆ Develop a strategic training and information policy which will provide a firm foundation on which to develop decision-making structures and strengthen relationships between the housing provider and tenants

◆ Identify performance indicators that will help to assess the quality of training and information provision on an on-going basis, with reference to performance in all other relevant aspects of the housing service

◆ Establish management information systems in order to collate the information necessary for performance measurement

◆ Ensure that the training and information provided does not create or perpetuate disadvantage or inequality among tenants or applicants for housing

◆ Provide appropriate opportunities for staff training and development, and facilitate and encourage staff participation in decision-making regarding the management of the service

◆ Co-ordinate information provision in all aspects of the housing management service, in order to ensure tenants receive a coherent, effective and responsive service

◆ Promote good relations between tenants and the social housing provider.

1·5 ACHIEVING GOOD PRACTICE IN THE PROVISION OF TRAINING AND INFORMATION FOR TENANTS

These guidelines are not intended to be an all-embracing guide to the provision of information and training for tenants. Each social housing provider must decide on the details of its own approach, having regard to the size and type of housing stock, the level of housing policy development and the changing nature of the local housing environment. However, several key elements of the training and information service can be singled out as particular priorities for reform in many social housing organisations, and it is these priorities for action which are the focus of the guidelines.

These guidelines on good practice in the provision of training and information for tenants are set out in four sections:

◆ Section Two focuses on the strategic management and monitoring of the provision of training and information to tenants, looking at the current position in terms of strengths and weaknesses and what steps need to be taken to develop a strategic approach to the topic. It also provides an outline of the changes that need to be made to systems and staffing in order to implement the strategy.

◆ Section Three focuses on the provision of training and addresses good practice in this area in relation to training selection, implementation, monitoring, evaluation and review.

◆ Section Four concentrates on good practice provision of information and, as such, considers issues such as appropriate information types and format.

◆ Section Five examines ensuring equality of access to training and information provision.

In the case of these priority areas, the guidelines suggest a range of reforms that each social housing provider should implement in order to achieve good practice in the provision of training and information for tenants. These 'Good Practice Recommendations' identify a base-line level of service that all social housing providers should aim to achieve in order to provide a satisfactory service to the customer. Furthermore, the guidelines also include a number of 'Best Practice Suggestions', intended to provide ideas on reforms that social housing practitioners may wish to implement in order to achieve excellence in the provision of information and training.

Section One of these guidelines mentioned that the provision of training and information to tenants is both integral to and a prerequisite for the involvement of tenants in housing management. This section highlights some key factors linking the provision of training and information to the development of tenant participation strategies and structures. Tenant participation itself is not considered in detail within these guidelines; however, further information on tenant participation is available within the good practice guidelines *Managing in Partnership: Enabling Tenant Participation in Housing Estate Management*. It is suggested that these documents are read in conjunction with each other.

This section highlights the need for social housing providers to adopt a strategic approach to planning and reviewing the provision of training and information for tenants. The aim of this section is to help social housing providers to review their current arrangements for the provision of training and information in order to help achieve wider corporate objectives such as increased tenant involvement and improved service delivery. This is relevant to a wide range of information and training and not limited to information and training relating directly to tenant participation.

STRATEGIC MANAGEMENT AND MONITORING OF TRAINING AND INFORMATION FOR TENANTS

2·1 **DEVELOPING A STRATEGIC APPROACH TO THE PROVISION OF TRAINING AND INFORMATION FOR TENANTS**

In relation to local authorities, the 1992 Housing (Miscellaneous Provision) Act required them to adopt statements of policy on housing management, and the accompanying DoELG Memorandum on the Preparation of a Statement of Policy on Housing Management specifics that tenant participation should receive particular attention in these documents. As the provision of training and information for tenants is inextricably linked to tenant participation, these statements should be reviewed and, if necessary, extended to include such issues. Whilst this legislation does not directly apply to voluntary and co-operative housing providers, these organisations shall also prepare and/or revise policy statements to include the issues surrounding the provision of training and information for tenants.

Taking a more strategic approach to the provision of training and information for tenants offers several benefits for social housing providers:

◆ It can serve to underline the organisation's commitment to tenant participation in policy development and also to the review of service provision.

◆ It provides a clear framework for the social housing provider and its tenants by outlining:

– the aims of the strategy

– the means and methods of achieving these aims, and

– the measures which will be applied to keep track of the organisation's performance in providing tenants with the training and information they require.

◆ It demonstrates the organisation's commitment to a culture of continuous improvement and also serves to embed tenant participation in the housing management processes, because it is explicitly incorporated into the organisation's policies, procedures and working practices.

◆ It enables the social housing provider to keep track of its performance in respect of ensuring equality of access to training and information for tenants, and ensuring that training and information provision is representative.

◆ When the overall purpose of providing training and information is clear to staff and tenants alike, it helps to ensure that communications are effective, efficient and beneficial.

◆ Furthermore, it can also have positive benefits for social housing providers themselves in relation to areas such as reductions in rent arrears and anti-social behaviour and increased communication and positive relationships with their tenants.

Good Practice Recommendation No. 1
Developing a Statement of Policy

◆ Social housing providers should revise the aspects of their statements of policy on housing management with a view to developing statements that will provide a framework for the strategic monitoring and management of the provision of training and information.

◆ The details of the statement of policy on training and information provision for tenants should be determined by each social housing provider on the basis of a consideration of the strategic needs of the organisation and of consultation with tenants, staff and elected members in the case of local authorities and by boards or trustees in the case of voluntary and co-operative housing providers.

◆ These statements should address the following issues:
  – the strategic objectives of the training and information strategy
  – the level of influence over housing management decisions that will be afforded to tenants
  – procedures for the on-going review and monitoring of training provision and its effectiveness
  – procedures for the on-going review and monitoring of information provision
  – the formats that will be used to provide information to tenants on aspects of the housing management service
  – procedures for addressing customer complaints
  – procedures for monitoring the performance of training and information provision
  – procedures for monitoring the impact and benefits of training programmes
  – the aim of providing training and information which include being accessible to all tenants
  – mechanisms that will be used to consult tenants regarding future training and information provision.

◆ Tenants living in all types accommodation including: standard houses, flats, sheltered housing, hostels, group housing schemes and halting sites should be taken into account when devising statements of policy on training and information for tenants. Furthermore all training and information provided by the social housing provider should be made available to all of these groups of tenants, although in some cases the documents or courses in question may need to be amended to meet the specific needs of the target group in question.

◆ In devising these statements, social housing providers may wish to take account of the list of key strengths and weaknesses in current arrangements for providing training and information to social housing tenants which are included on the following page. These issues were identified by the tenants groups consulted in the compilation of these guidelines.

Key Strengths and Weaknesses in Current Arrangements for Provision of Training and Information to Social Housing Tenants

KEY STRENGTHS	Annual Reports	Social housing providers, assisted by guidelines from the Local Government, produce annual reports.
	Tenant Handbooks	Social housing providers produce tenant handbooks that are distributed to tenants.
	Pre-tenancy Training	Most social housing organisations undertake pre-tenancy training, with tenants being advised of the conditions of tenancy and their responsibilities.
	Staff Training	Staff are beginning to receive customer care training.
	Complaints Procedures	Complaints procedures are produced by some social housing organisations.
	Information Technology (IT)	A new IT system is currently being developed and rolled out to wider local authority areas which should facilitate the gathering, analysis and accessibility of information.
	E-government	E-government is generally quite progressive in social housing organisations. Most social housing organisations have at least a basic website with a housing section, which may provide a foundation for further development. Libraries provide free web access for those without access at home or work.
KEY WEAKNESSES	Information Clarity	Tenancy agreements are difficult to understand and vary in content, with tenancy conditions not necessarily reflecting current policy developments and initiatives. Rent-increase letters can be difficult to understand.
	Annual Reports	Annual reports are not automatically distributed to tenants as a matter of course.
	Tenant Feedback and Satisfaction	Tenants are not generally encouraged to undertake feedback to social housing providers on the effectiveness of information, training or service delivery. Few tenant satisfaction surveys are currently undertaken and no guidance exists on the development of these surveys although local authorities are in theory required to provide proof of consultation in order to receive central government funding for refurbishment programmes.
	Complaints Procedures	Complaints procedures are frequently not publicised.
	Training Provision	The provision of training is very limited and there is no central advice resource in respect of training. There is no standardised approach to the provision of information or training across social housing providers. The level and quality of training in respect of tenant participation depends largely on the initiative and experience of the Tenant Participation Officer (TPO) in local authorities and his/her ability, coupled with the availability of funding to introduce training programmes or other initiatives and projects. Whilst training can be bought in, there is currently no framework to assess needs or to evaluate the effectiveness of any training provided in terms of both value for money and meeting tenants' needs.
	Information Technology (IT)	Current IT systems make it difficult for social housing providers to generate and collate some information.
	Tenant Participation Officers (TPOs)	TPOs employed by local authorities and, similarly, officers in the voluntary and co-operative sector do not necessarily have housing experience – this may limit their ability to encourage tenant participation and reinforces the need for training of these officers.

Good Practice Recommendation No. 2
Consultation Regarding Statements of Policy

◆ Social housing providers should ensure that tenants play a central role in the development of a statement of policy on training and information provision. This process will allow current difficulties in information provision to be gained from the tenants' perspective and also that future training and information will be targeted and effective.

◆ It is suggested that current operational channels of communication used for tenant participation are first utilised to undertake initial consultations with tenants on this matter. Communication and consultation could then be advanced and extended with the on-going evaluation of provision, assessment of needs and equality monitoring.

◆ When devising this statement of policy, it may also be appropriate to consult with other relevant organisations, such as: the Money Advice and Budgeting Service, the local authority social inclusion unit and representative groups such as the Local Traveller Accommodation Consultative Committee.

Good Practice Recommendation No. 3
Communicating Policy to Tenants and Staff

◆ Each social housing provider should ensure that its policy on the provision of training and information for tenants is communicated to both tenants and staff alike. This may be undertaken most effectively by including these details within the tenant participation policy statements and also by using the procedures that are identified in Sections Three and Four of the guidelines respectively.

Best Practice Suggestion No. 1:
Commitment of Senior
Management, Elected
Representatives and Board
Members

◆ The commitment of senior staff and elected representatives (in relation to local authorities) and board members or trustees (in relation to voluntary and co-operative housing providers) to the tenant training and information strategy can be a significant aid to its effective implementation. It can help ensure that training and information provision is effectively resourced and that the concerns and suggestions raised by tenants are treated with due priority by all sections of the housing service.

◆ In order to ensure this commitment:
  – local authorities may wish to consider developing their statement of policy on training and information provision through the medium of the Strategic Policy Committee with responsibility for Housing.
  – voluntary and co-operative housing providers may wish to consider developing their statement of policy on training and information provision thorough the medium of the Board.

2·2 DEVISING SYSTEMS TO MONITOR PERFORMANCE

Social housing providers should monitor their performance in providing training and information to tenants against the objectives specified in their strategy on this area. To do this they will need to develop a range of indicators and targets upon which they should report on at least an annual basis, by means of an Annual Report or via newsletters or special editions of newsletters. These indicators would be established in addition to those used to measure other areas of housing management performance such as rent arrears or property void periods.

Twenty-one nationally applicable service indicators were launched in 2000 by the DoEHLG (increased to forty-two in 2004) in relation to local authorities. However, their usage and therefore resulting usefulness varies widely between local authorities who, in the absence of specific guidance, have used the indicators, to a lesser or greater extent, in a variety of different ways to report on service performance aspects in various formats.

In addition to national indicators, a number of local authorities have devised a set of local indicators to reflect local priorities. The mechanisms for developing these indicators again vary although they are generally designed to supplement national indicators.

The practice of linking service indicators to local priorities, particular initiatives and good practice should be adopted by all social housing providers as this provides a robust basis for providing tenants with details of the services and specific standards that they can expect to receive.

Good Practice Recommendation No. 4
Performance Indicators

◆ In order to achieve good practice in the management of the provision of training and information for tenants, social housing providers should monitor the following on an annual basis:

– the number of suggestions received from tenants regarding training and/or information provision
– the number of complaints received from tenants regarding training and/or information provision
– the number of suggestions and complaints that have been acted upon
– what action has been taken in regard to suggestions or complaints received
– the proportion of tenants from different ethnic backgrounds who received pre-tenancy training
– the representation of other sections of the community who have received training or information, or have contributed to the development of training and information provision; this could be given in percentage terms of the overall population.

Good Practice Recommendation No. 5
Consistency in Performance Setting

◆ As far as possible the indicators used to assess the performance of different aspects of the training and information strategy for tenants should be relatively consistent and the same indicators should be used over a number of years. Consistency in performance setting will enable:

– social housing providers to provide more useful information to tenants and so enable them to better understand the standard of service they can expect to receive

– social housing providers to accurately assess their current performance
– social housing providers to compare current performance with performance in previous years
– tenants to feed into the service development process, enabling the tailoring of future information and training provision to be influenced by tenant input.

Good Practice Recommendation No. 6
Performance Monitoring Systems

◆ There is a need to develop IT systems which will enable social housing providers to gather performance monitoring information in a meaningful way. From this they can measure their own performance against their set strategic objectives and also against other comparable social housing providers if desired.

◆ Clearly, local authorities need monitoring and review mechanisms in place to ensure that where measurement against indicators identify unsatisfactory service levels or persistent poor performance, action can be taken to review service or policy in that area in consultation with tenants to ensure continuous improvement.

◆ Equally where performance indicators are consistently exceeded and levels of satisfaction are high in particular areas, causal factors should be explored to enable good practice to be shared.

2·3 GOOD PRACTICE IN STRATEGY IMPLEMENTATION

There are a number of reforms involved in implementing a training and information strategy, once it has been established. Some of these will be easier to achieve than others, but as a minimum, they should include the good practice recommendations outlined below.

Good Practice Recommendation No. 7
Standardisation of Information

◆ Feedback from the tenants consulted regarding the compilation of these guidelines indicates that social housing providers should look at ways of standardising information supplied to tenants to ensure it is accessible and easy to understand.

◆ Social housing providers should develop a standardised approach to the production of information for tenants, which reflects the recommendations and suggestions contained in Sections Three and Four of these guidelines. This is a particular priority in respect of the following important areas:
  – Tenancy and Licence Agreements
  – Tenant Handbooks
  – Complaints Procedures
  – Tenant Satisfaction Surveys
  – Annual Reports
  – Training.

◆ All documentation supplied by the social housing provider should be instantly recognisable to the reader and be clearly and simply laid out, thereby ensuring ease of use and understanding and helping to reduce confusion.

◆ Legal documents supplied to tenants, such as tenancy and licence agreements, have a tendency to be complex and difficult to digest. Such documents should be revised and standardised to make them more user friendly.

◆ The provision of useful information is a prerequisite to encouraging tenants to provide feedback and suggestions for improving performance in service delivery. All information currently supplied should be reviewed to ascertain why it is being issued and whether it meets its aims and objectives and, furthermore, that it is a useful document in this regard.

◆ There is also a need to regularly review tenancy agreements to ensure that they comply with current government policy and initiatives, e.g. the inclusion of recent legislation in regard to anti-social behaviour and equality issues.

Best Practice Suggestion No. 2: Explanatory Material	◆ If documents remain complex then an explanatory leaflet should be provided to help the user fully understand their content. This could apply to documents such as: – Legal documents, e.g. tenancy and licence agreements – Rent-review and rent-increase letters – Rent calculation documents.

Good Practice Recommendation No. 8
Staff and Tenant Training

◆ An integral part of any training and information strategy and of any tenant participation strategy is the training of both tenants and local authority personnel. Training helps ensure that both parties have a clear understanding of the aims and objectives of the strategy, its implementation and how the aims and objectives are to be achieved.

Good Practice Recommendation No. 9
Complaints Procedures

◆ Complaint procedures should be established by all social housing providers and widely publicised. This procedure should be viewed by staff and tenants alike as a vital means of information exchange that has as its ultimate purpose service improvement rather than criticism of those who provide the service. Complaints procedures are discussed in more detail in Section 4.1.

Good Practice Recommendation No. 10
Customer Care Training

◆ In order to ensure that the housing service responds quickly and effectively to any issues or concerns about housing management which are raised though the complaints process, social housing providers should provide customer care training for all housing staff. Training of this type is particularly important for staff who deal with the public on a daily basis, e.g. counter staff and receptionists.

Best Practice Suggestion No. 3:
Communications Strategy

◆ A communications strategy can help social housing providers develop a consistent approach to all types of communication with tenants and define a process for policy development and service improvement (such as establishing a steering group, numbers, representation, frequency of meetings, etc) which can be adopted and used across all changes to service or policy. An effective training programme can be informed by the objectives of the communications strategy to ensure that tenants are equipped with the necessary skills to participate fully and actively in the process.

◆ Social housing providers need to produce robust and inclusive communications strategies to ensure that core communications materials (e.g. annual reports, tenant satisfaction surveys, etc) are issued on a recurrent regular basis. A robust means of assessing and reviewing the training and information needs of tenants should be incorporated into the communications strategy.

◆ It is vital that there is a two-way stream of information between tenants and housing providers, and that this communication channel, once opened up, becomes interactive and responsive. The communications strategy should seek to ensure that all information is made as accessible as possible to all customers, regardless of their age, gender, ethnic background or disability. This means tackling issues as routine as rent-increase letters, and making sure that wherever there is a possibility that particular tenants may experience difficulty in understanding this kind of communication, extra effort is made to explain it.

Best Practice Suggestion No. 4:
Customer Charters

◆ Customer charters should be devised for all social housing services. These documents, though not legally binding, are important as they clearly outline the rights of tenants whilst also specifying service standards across all housing service areas.

◆ Charters can provide a basis by which levels of satisfaction among tenants can be measured, particularly where social housing providers have identified specific targets for performance in relation to pre-set service indicators.

Best Practice Suggestion No. 5:
Joint Working

◆ To ensure the success of the training and information strategy in the longer term, there will need to be a greater amount of joint-working between social housing providers, in order to eliminate duplication, contradiction and confusion in their training and information provision. By working closely together, housing providers may find that they are able to make training and information provision a less costly process in terms of resources.

Best Practice Suggestion No. 6:
Landlord-Tenant Agreements

◆ It may be beneficial for social housing providers and their tenants to enter into formal Landlord-Tenant Agreements. These agreements should reflect what tenants have told the local authority about how they want to be involved in local authority services, and it should detail specific standards relating to the provision of services, information, training and tenant involvement. However, it should be acknowledged that an effective flow of communication between a social housing provider and its tenants is an absolute prerequisite to the development of an effective agreement, and the right mechanisms must be in place to enable tenants to receive training and provide information on their views.

◆ The Landlord-Tenant Agreement should establish standards for all tenants of the particular housing provider. Some tenants may want to negotiate standards tailored to the specific needs of their community, which can be reflected either in the first Agreement or, more realistically, in the subsequent versions of the Agreement, as it develops over time.

◆ The Agreement should build on the relationship that the social housing provider has with its tenants and recognise the diversity of tenure and stakeholders across estates.

◆ The Agreement should define standards and involvement mechanisms in key service areas, including:
  – Developing local authority policy and strategy
  – Budgets, finance and rent setting
  – Allocations and letting policies
  – Anti-social behaviour
  – Tenancy conditions and agreements
  – Repairs and maintenance procedures
  – Complaints procedures
  – Developing and implementing regeneration and improvement programmes
  – Working with consultants.

This section outlines the elements necessary to ensure that the training provided to tenants meets its objectives and achieves good practice. It demon-strates the long-term manage-ment and operational gains that can be yielded from investing in and devising tailored training for tenants. It explains how to evaluate training to ensure that it is serving its purpose and is reaching its fullest potential in terms of tenant engagement and involvement. The closing part of the section examines good practice in relation to two key areas:

◆ The development of training programmes for tenants, and

◆ Pre-tenancy courses.

This information will be of interest to social housing providers who are improving their existing training pro-gramme or initiating a comprehensive training pro-gramme for tenants.

TENANT TRAINING

3·1 DESIGNING A TRAINING PROGRAMME

A number of issues should be taken into account when designing a training programme. These issues can be categorised as follows:

◆ Type of training
◆ Operational issues, and
◆ Monitoring, evaluation and review.

3.1.1 *Stage One – Type of training*

The first step in devising a training programme for tenants is to examine the training that is currently provided and to identify any shortfalls in that provision. This process should be carried out in consultation with tenants. The wider needs and corporate objectives of the social housing provider should also be taken into account.

According to the Irish Council for Social Housing, tenant training programmes should address the following needs:
– Developing personal qualities and general skills
– Running a successful group, association or organisation
– Developing specialist organisational and admin-istrative skills
– Understanding leadership roles
– Obtaining information and knowledge about tenant participation in housing estate management

– Developing a general knowledge of housing policies and administration

Details of the types of tenant training courses which could be provided in order to address these needs are set out on the following page.

3.1.2   *Stage Two – Operational Issues*

Once a training programme has been designed and courses selected for inclusion, the next issue to be considered is the content of the individual courses. These issues are highlighted below.

Good Practice Recommendation No. 11
Tenant Involvement in Planning and Implementation

◆ Tenants should be involved from the outset in identifying the content of the training programme as well as assisting with the implementation of the training where appropriate. Involving tenants in training implementation utilises their skills and can reduce the need to employ external trainers, thus ensuring that the training programme represents value for money.

Good Practice Recommendation No. 12
Frequency of Training Provision

◆ Frequency of training will depend largely on the type of training required and levels of demand.

◆ Pre-tenancy training should be provided for all new tenants.

◆ Training in respect of issues such as changes in legislation or policy, which will directly impact on social housing tenants, should be delivered as necessary.

◆ Routine training courses relating to tenancy conditions and personal development skills should form part of an ongoing rolling tenant training programme.

◆ Skills development training sessions should be set up on a regular basis to develop the skills of new attendees and provide a refresher course to previous attendees as appropriate, in this way assisting the development of sustainable tenant participation structures.

Types of Tenant Training: Summary of Target Groups, Timing, Content and Benefits

TRAINING TYPE	TARGET GROUP AND TIMING	CONTENT	BENEFITS

Pre-Tenancy Training	◆ Provided to all tenants prior to the signing of the letting agreement
	◆ Mainly in 'House provision': but also includes presentations and/ or information from other services, e.g. The Money Advice and Budgeting Service and the Health Board
		◆ Rent setting, recovery and arrears retrieval
		◆ Tenant conduct
		◆ Rights and responsibilities of tenants
		◆ Role and responsibilities of housing provider
		◆ Details of local area and services
		◆ Explanations on how components work, e.g. heating system
		◆ Basic maintenance issues and policy
			◆ Maximise tenants' understanding of:
			  - all areas of tenant handbook
			  - tenants' rights and responsibilities
			  - housing provider's role and responsibilities
			  - consequences of breach of tenancy, e.g. in relation to anti-social behaviour
			◆ Help minimise future misunderstandings resulting in breaches of tenancy (rent arrears, anti-social behaviour, etc)
			◆ Minimise associated costs to the local authority of enforcing tenancy conditions where breaches occur
			◆ Improve the quality of life on estates

Tenant Participation Training – Post- Tenancy Training	◆ As necessary, to establish new tenant participation initiatives on new or existing estates	◆ Begin by identifying the issues that tenants wish to have addressed
		◆ Prioritise these issues
		◆ Specify the aims of the group
		◆ Meet members of established tenant participation projects
		◆ Draw up a constitution
		◆ Examine the role of committee members
		◆ Make contacts with other groups and agencies who can help the group meet their aims (strategic partnerships)
		◆ Identify potential sources of funding, e.g. Housing Management Initiative Grants Scheme
		◆ Use an independent trainer where possible as this will enable tenants to express their views more freely
			◆ Provides an opportunity for tenants to:
			  – become involved in decision-making processes
			  – make suggestions in respect of service delivery
			  – build sustainable involvement
			◆ Increases levels of trust and communication between housing provider and tenants
			◆ Targets area most in need of redress within the local area
			◆ Improves the quality of life on estates

Types of Tenant Training: Summary of Target Groups, Timing, Content and Benefits

TRAINING TYPE	TARGET GROUP AND TIMING	CONTENT	BENEFITS
Skills Development Training	◆ Should be provided as the need arises ◆ Can be provided in-house or in conjunction with partner agencies ◆ Particularly important to the establishment of tenant participation schemes	◆ Effective communication skills ◆ Organisational skills ◆ Administrative skills ◆ Verbal presentation skills ◆ Public speaking ◆ How to run an effective meeting ◆ Leadership skills	◆ Increases the confidence of individual tenants and groups ◆ Leads to better communication between tenants and social housing providers ◆ Increases tenants' capacity to deal with local issues rather than relying on housing and service provider input, e.g. local rubbish collection initiatives
Tailored courses to provide advice and support to specific groups of tenants	◆ Should be provided as the need arises ◆ Can be provided in-house or in conjunction with partner agencies such as the Citizens' Information Centres or the Money Advice and Budgeting Service	◆ Debt counselling for tenants in financial difficulty	◆ May assist social landlords to reduce costs associated with pursuing court action in cases of breaches of letting agreements
General Interest Courses	◆ Should be provided as the need arises ◆ Depending on the nature of the course, a specialist trainer may be required	◆ Health and safety ◆ Basic household maintenance ◆ Managing household budgets	◆ Increases the self-confidence of tenants ◆ May reduce the number of enquiries and requests for assistance received by the social landlord

Good Practice Recommendation No. 13

Accessibility of Training

◆ In order to ensure that training is accessible, plain, jargon-free language should be used wherever possible. If jargon must be used make sure it is fully explained and understood by the tenants.

◆ In order to maximise the accessibility of training to all sectors of the community, consideration should be given to a range of issues including the following:
 – Sensitivity to levels of literacy within the community
 – Location of the training venue
 – Time of the training
 – Availability of public transport to or near the venue

– The provision of transport to the training venue, if appropriate
– Access to the training venue for disabled persons
– The availability of signers where tenants are hearing impaired
– The availability of an interpreter, or staff proficient in Irish and other languages spoken by tenants
– The possibility of training sessions being delivered in the community languages of those attending training
– Crèche facilities and other support to enable tenants with childcare responsibilities to attend training.

◆ The training programme should also incorporate a standardised method of assessing its usefulness, in order to ensure value for money for the housing provider.

Good Practice Recommendation No. 14
Needs Assessment

◆ Social housing providers should carry out a needs assessment to establish which tenants require training; ensure equality of access to training.

Good Practice Recommendation No. 15
Information Programmes

◆ The training programme should also include information on developments in housing policy and the rights and role of tenants. This could include: details of the social housing provider's housing management and customer service policies and reforms to housing policies.

Best Practice Suggestion No. 7: Joint Training	◆ In some cases it may be appropriate for staff and tenants and elected members (in the case of local authorities) or board members ot trustees (in the case of voluntary and co-operative housing providers) to undertake some aspects of training together.
	◆ This could enhance understanding of the respective roles and responsibilities of these various groups.
	◆ Training of this type is also particularly helpful in promoting inclusion of minority groups such as older people, people with a disability, Black and Minority Ethnic tenants and Travellers.

3.1.3   *Stage Three – Monitoring, Evaluation and Review*

In common with all other aspects of social housing service, the identification of a system of performance indicators is a vital step to achieve good practice in the provision of training and information for tenants. The exact indicators chosen will depend on the circumstances of each social housing provider. However, the recommendations provided below may help in the identification of suitable performance indicators. Once these indicators are established it is imperative that they be monitored and reviewed on a regular basis, annually at a minimum. Housing providers may wish to consider the issues below for inclusion within their monitoring and review process.

Good Practice Recommendation No. 16
Content Monitoring and Review

◆ The content of tenant training courses should be regularly reviewed and monitored in order to ensure that they remain relevant to the needs of tenants and the social housing provider and reflect any new policy development or organisational changes.

Good Practice Recommendation No. 17
Evaluation and Feedback

◆ All aspects of the training programme should be evaluated in a consistent manner, thus ensuring that all of the information generated is comparable. This can be achieved by devising standardised evaluation forms.

◆ The evaluation forms should collect a variety of types of information, including qualitative (descriptive) and quantitative (numerically-based) information.

◆ In order to help social housing providers design training evaluation forms, a checklist of the suggested content is provided on the following page.

◆ Using the information gleaned from evaluation forms, together with information on the cost of delivery, social housing providers should endeavour to assess the value for money of training.

◆ The results of the evaluation process should reflect the original aims and

objectives of the particular training as well as achievements in relation to any wider targets for tenant training or tenant participation which are set by the social housing landlord.

◆ It may not be possible for housing providers to immediately assess the wider impact of the course but a programme of regular monitoring will shed light on this issue. This type of monitoring could include the number of tenants attending tenant participation courses, the number of new tenants associations established and the number of tenants who have become involved in housing management.

◆ Social housing providers should also endeavour to assess whether the perceptions of staff and tenants have changed as a result of working together and whether these two groups work more effectively together as a result.

◆ The methods appropriate for assessing the long-term impact of skills training depend on the topic of the training in question. For example the impact of debt management and advice training could be assessed with reference to any reductions in rent arrears as a percentage of rent collection.

Training Evaluation Forms: Checklist of Contents

Relevance

◆ Tenants should be able to suggest areas of the training course which were less or more useful than others and make suggestions about future changes or topics they would like to see included.   √

◆ In order to assess relevance the evaluation form could ask whether the training course:
– covered the anticipated issues?   √
– fell below, met or exceeded expectations?   √
– was relevant to the needs of participants?   √
– was useful to participants?   √

Quality

◆ In order to assess the quality of the course the following questions should be asked:
– How easy or difficult was the course content to follow?   √
– Was the trainer easy or difficult to understand?   √
– Was the pace of the training too fast or too slow?   √
– Did the course increase the confidence of participants?   √

Good Practice Recommendation No. 18
Feedback to Tenants

◆ Where training is intended to enable tenant involvement in housing policy development and service delivery the social housing provider should report back to the tenants concerned about how their input or involvement has been reflected in changes to the housing service.

◆ This feedback could be delivered by means of the annual report, newsletters or meetings.

Good Practice Recommendation No. 19
Record Keeping

◆ Accurate records relating to the provision of training should be kept. This will enable the social housing provider to assess the success, level of take-up and impact of its training programmes and also to maintain a data-base of the skills of those who have participated in the training. At a minimum information should be kept on the following:
– Details of courses held
– Number of tenants attending each course
– Gender and ethnic break-down of those in attendance
– Feedback information on course e.g. affects on personal development, course clarity, etc.

3.2 FUNDING FOR TRAINING

At the moment the only source of designated central funding for the training of social housing tenants comes from the Housing Management Initiatives Grants Scheme which is administered by the Department of the Environment, Heritage and Local Government. In order to develop a sustainable training programme, social housing providers will need to allocate funding from within their own existing budgetary resources. Social housing providers may wish to consider setting aside a proportion of the housing management budget to fund these activities.

Establishing the mechanisms for funding or justifying initial expenditure on the development of a training programme will obviously require a cost-benefit analysis to demonstrate value for money. When reaching decisions about the allocation of funding for tenant training, social housing providers should also take account of the potential of training to achieve cost saving in other areas by for instance encouraging tenants to take more responsibility for the management of their own homes and estates.

Good Practice Recommendation No. 20
Funding for Training

◆   Social housing providers should apply for available central government funding for tenant training and may also wish to consider setting aside a proportion of the housing management budget to fund these activities.

3.3 PRE-TENANCY TRAINING

The extent of pre-tenancy training undertaken by social housing providers varies dramatically, ranging from brief discussions around tenancy conditions when the tenancy agreement is signed, to courses involving several two-hour evening sessions focusing on issues such as tenancy conditions, rent, maintenance and anti-social behaviour. Indeed, in the case of housing co-operatives the National Association of Building Co-operatives promotes the participation of all applicants in an advance training, information and familiarisation programme of five or six sessions which deal with issues including membership responsibilities and tenancy terms prior to an allocation being made.

The type of pre-tenancy training currently provided by social landlords is largely dependent on how the allocation of the tenancy comes about. More intense compulsory training is generally made available to tenants who are moving into new

estates and shorter courses are made available to those being allocated casual vacancies. Many social landlords extend invitations to external speakers including speakers from the Health Board and adult education groups to speak at pre-tenancy courses in order to draw tenants' attention to the services which these organisations provide.

In order to achieve good practice in the delivery of pre-tenancy training, social landlords need to ensure that this training is relevant to the needs of tenants and is delivered to a consistent standard and that consistent rules are put in place in relation to attendance at this training. The good practice recommendations outlined below include some ideas on how this can be achieved in practice.

Good Practice Recommendation No. 21
Attendance at Pre-Tenancy Training

◆ For the following reasons attendance at pre-tenancy training should be made compulsory for all new social housing tenants, including those who have been allocated a tenancy as a result of a casual vacancy and those who have been allocated a newly built dwelling:
  – Tenants who have undertaken the course may become aware that their neighbours have not done so. This can lead to problems either between tenants or between tenants and the social landlord.
  – Not requiring all tenants to attend pre-tenancy training makes it difficult to monitor the impact and therefore the value for money of such training, and reduces its effectiveness in encouraging community development and tenant participation in housing management because not all tenants have attended.
  – Not requiring all tenants to attend pre-tenancy training may marginalise certain groups who may choose not to attend pre-tenancy courses for a variety of reasons including literacy, language or fear of not understanding.

Good Practice Recommendation No. 22
Designing Pre-Tenancy Training

◆ If, as was suggested above, attendance at pre-tenancy training should be compulsory for all new tenants, it is very important to ensure that all of the issues addressed in this training are relevant to tenants.

◆ The exact content of pre-tenancy training courses will depend on the requirements of the social landlord and the needs of tenants and the particular community in which they will be living. For instance, it may be appropriate to hold longer pre-tenancy courses for tenants of new estates, and shorter courses for those who have gained a tenancy as a result of a casual vacancy in an existing estate. Social housing providers may find the checklist included on the following page a useful aid to deciding the appropriate content of pre- tenancy training.

◆ The duration of the training course should be sufficient to cover all necessary issues, but appropriately short to take account of the many other demands tenants and staff have on their time. Four to six two-hour sessions are usually sufficient to cover all relevant material.

◆ However, social housing providers should ensure that consistent quality standards are maintained for all types of pre-tenancy courses.

Best Practice Suggestion No. 8: Additional Topics for Pre-Tenancy Training	◆ In order to achieve best practice in the provision of pre-tenancy training, social housing providers may wish to consider including some or all of the following topics in training: – Advanced home maintenance – Gardening – Basic interior decoration – Information on the community, social, health, commercial and educational facilities available in the locality – Information on local schools, crèches and services for children – Detailed information on household budgeting and advice for those in debt, provided by the Money Advice and Budgeting Service – Information on the rights and entitlements of social welfare claimants provided by the local Citizens' Information Centre.

Pre-Tenancy Courses: Checklist of Contents

INTRODUCTION

◆ Background to the social housing provider, its function and structure   √
◆ Explanation of the purpose, content and duration of the course   √
◆ Introduction of relevant member of staff from the social housing landlord   √
◆ Introduction of other course participants   √

OPENING DISCUSSION

◆ What information do participants hope to learn from the pre-tenancy course?   √
◆ What are the participants' hopes for their new home and community?   √
◆ How can the pre-tenancy course be tailored to help achieve these ambitions?   √

TENANCY AGREEMENT

◆ Background to the content and purpose of tenancy agreement   √
◆ Group discussion on the rights and responsibilities of the social housing landlord and the tenants as outlined in
   the tenancy agreement   √
◆ Questions and answers on the tenancy agreement   √

RENT ASSESSMENT AND COLLECTION

◆ Explanation of the services which are funded by rents   √
◆ Explanation of the sources of income taken into account and disregarded when determining rents   √
◆ Explanation of how rent is calculated   √
◆ Explanation of any other charges levied in addition to rent and how these charges are calculated   √
◆ Arrangements for paying rent   √
◆ When should the landlord be informed of a change in the tenant's income?   √
◆ What to do in cases of rent arrears   √
◆ Basic household budgeting   √

MAINTAINING THE DWELLING

◆ Explanation of the key components of the dwelling which require regular maintenance and repair   √
◆ Explanation of how to recognise when a component requires repair   √
◆ Explanation of the maintenance responsibilities of the social housing provider   √
◆ Explanation of the maintenance responsibilities of the tenants   √
◆ Explanation of how to request a repair   √
◆ Explanation of the social landlord's cyclical maintenance and upgrading strategy   √
◆ Basic home maintenance   √

ESTATE MANAGEMENT

◆ Local area offices and their function   √

ANTI-SOCIAL BEHAVIOUR

◆ Explanation of the social housing provider's anti-social behaviour policy and procedures   √
◆ How to make a complaint about anti-social behaviour   √
◆ How this complaint will be dealt with   √
◆ Supports for victims of anti-social behaviour   √

TENANT PARTICIPATION IN HOUSING MANAGEMENT

◆ Details of the social housing provider's strategy for enabling tenant participation in housing management.   √
◆ Explanation of the aspects of housing management on which tenants will be consulted and the level of influence
  which they will be afforded   √
◆ Discussion of whether the course participants wish to participate in housing management   √
◆ Election of tenants association (if relevant)   √

This section examines the provision of written information to tenants. It addresses the key questions which social housing providers should consider when assessing their current practice in this area and when devising a communications strategy to improve their standard of information provision. In the closing part of the section, two keys areas of good practice in information are considered, specifically: tenancy agreements and tenant satisfaction surveys. It is envisaged that this information will be a useful tool for social housing providers who are seeking to improve the quality and relevance of the information that they provide to tenants, and to actively encourage tenant feedback, with the ultimate goal of improving service delivery.

INFORMATION FOR TENANTS

4·1
TYPES OF INFORMATION

This contains details of various types of information that should be considered for inclusion in an information strategy for social housing tenants. The good practice recommendations outlined below identify a baseline level of information which social housing providers should make available to all tenants as a minimum regardless of the type of accommodation they live in. In addition, the circulation of the organisation's annual report to tenants and the provision of performance reports and repairs satisfaction assessment are identified as measures which could be adopted in order to achieve best practice.

Good Practice Recommendation No. 23
Tenant Handbooks

◆ Tenant handbooks provide the following:
   – An opportunity to expand on the basic information regarding the terms and conditions of tenancy which is set out in the tenancy agreement
   – An opportunity to expand and provide further details on the services that tenants can expect to receive including specific standards of services and key performance indicators such as repair response times for different categories of repair
   – Information on the course of action available to tenants if the standard of service they receive is unsatisfactory, including use of the complaints procedure and the subsequent action they can expect.

◆ All social housing tenants should be issued with tenant handbooks. These should be distributed during pre-tenancy

training. If they are worked through and explained to prospective tenants at this time, they will provide a useful aid to training. Tenant handbooks should contain the following information as a minimum:
– Tenancy agreement and tenancy conditions
– Lettings policy; policy on transfers and exchanges
– Repairs and maintenance procedures
– Rights and responsibilities of tenants and of the social housing provider
– Consequences of tenancy breaches
– Information on becoming involved in tenant participation
– Complaints procedure
– Rent determination and payment methods and social welfare information
– Details of out-of-hours services and emergency numbers (e.g. in case of gas leak).

◆ For tenants of new dwellings it is also important that handbooks contain details and emphasise the importance of the defects liability period and how defects should be reported and will be dealt with within the period. This is particularly important due to the cost implications of necessary work not being reported and dealt with within the specified timescale.

◆ Good practice guidelines previously issued by the Housing Unit on the repair and maintenance of dwellings, rent assessment, accounting, collection and arrears control and void management, include recommendations on information regarding these services which is appropriate for inclusion in tenant handbooks.

◆ Should other forms of relevant and useful information be available these too should be included in the handbooks. Such information may include details of a suggestions scheme.

◆ Pre-tenancy documentation can be accompanied by a pre-tenancy course. This form of training is considered in detail in Section Three of these guidelines.

◆ Tenant handbooks can also include reference to annual reports, outlining the local authority's broader performance in key service delivery areas and information about how tenants can be involved in improving service delivery to better meet the needs of the community.

Good Practice Recommendation No. 24

Suggestions Scheme

◆ Suggestion slips should be displayed in reception areas for tenants to complete, advising how they think services, procedures, information and training could be improved upon. Once completed, slips should be posted in an easily accessible and clearly visible suggestions box.

◆ Suggestion slips could be completed anonymously. However, the gender, age and ethnicity of those who fill out suggestion slips should be recorded to allow for monitoring of the information provided on these grounds.

Good Practice Recommendation No. 25

Complaints Procedure

◆ All social housing providers should have a complaints procedure. As well as protecting the rights of tenants, an effective complaints procedure provides an opportunity for:
  – tenants to highlight potential areas of weaknesses in service delivery
  – tenants to suggest how they think the problem might have been better dealt with
  – tenants to suggest how they think the service might be delivered more effectively in future
  – highlighting areas of service delivery which may exclude or marginalise certain sectors of the community, by monitoring the ethnicity, gender, age or other relevant characteristics of complainants
  – service delivery standards to be monitored and improved upon if and where necessary.

◆ The complaints procedure should be easy to use. Full details of the procedure should be provided to tenants at the commencement of tenancy and also publicised in reception areas or through newsletters, etc.

Good Practice Recommendation No. 26
Newsletters

◆   Newsletters are an effective means of keeping tenants informed about current initiatives and future plans. They are also a means of informing tenants of local tenant participation initiatives and how tenants can become involved.

◆   Newsletters that contain articles written by tenants themselves can prove more interesting and relevant to the reader, and competitions to encourage tenants to become involved can contribute to the development of the newsletter.

◆   Reports on the performance of the social landlord could also be included within newsletters, perhaps in a special edition format.

Best Practice Suggestion No. 9:
Repairs Satisfaction Slips

◆   Guidelines previously issued by the Housing Unit on the repair and maintenance of dwellings recommend that repairs satisfaction slips should be provided to all tenants on the completion of a repair to their dwelling.

◆   Repairs satisfaction slips have benefits for both the tenant and the social housing provider. They allow tenants to express their views in regard to the work undertaken in the property whilst facilitating a simplified means of performance collection with regard to number of repairs undertaken, number of repairs completed to a satisfactory standard, number of repairs outstanding, etc.

◆   Repairs satisfaction checks can be undertaken in a number of ways, one of which involves the tenant signing a completion slip for the workers once the job has been completed. These slips would then be returned to a designated member of staff of the social housing provider to collate information in this area.

Best Practice Suggestion No. 10:
Annual Report

◆ Social housing providers may wish to consider circulating all tenants with an annual report which details their performance in key service delivery areas over the previous financial year against key performance indicators and compares this information against the previous year's performance to set the information in context.

◆ The following key performance areas merit inclusion in the annual report:
   – rent collection
   – arrears recovery
   – money spent on improvements to properties
   – percentage of repairs completed on time
   – average number of weeks to re-let empty properties
   – levels of tenant satisfaction in relation to target levels for key service delivery areas.

◆ It may be helpful to use illustrations such as pie charts to help tenants understand and visualise the achievements of the social housing provider.

◆ Tenants should be encouraged to comment on the annual report. This can be done through tear-off slips attached to the annual report for tenants to complete and return or, alternatively, via free telephone numbers for tenants to call and make comments or suggest changes. The aim of such communication is to help the social housing provider improve standards of service delivery.

◆ The annual report allows the housing provider to provide information on local active tenants associations and on tenant participation. It also allows the housing provider to provide details on how tenants can become involved in shaping service delivery and in the decision-making process.

◆ The Local Government Section of the DoEHLG has produced guidelines for local authorities on the production of annual reports. The focus of information within annual reports and the scope of performance indicators used by social housing providers to measure key services need to underpin the framework for the tenant satisfaction survey.

Best Practice Suggestion No. 11: Performance Reports	◆ In addition, or as an alternative, to annual reports, social housing providers may wish to consider distributing more detailed performance reports to tenants on an annual basis. As well as the key performance indicators mentioned above, performance reports could also include the results of tenant satisfaction surveys.

4.2 FORMAT OF INFORMATION

Having reviewed the types of information that will be supplied to tenants, it is then necessary to ensure that all information distributed is easily understood and relevant to the needs of tenants. The following recommendations and suggestions identify how this can be achieved.

Good Practice Recommendation No. 27
Standardisation of Information

> ◆ A standardised approach should be used when writing and designing information for tenants. All information should be written in clear language so that it can be easily understood and should have a similar design so that it is immediately recognisable. This is a particular priority in respect of the following types of information:
> – Tenancy and Licence Agreements
> – Tenant Handbooks
> – Complaints Procedures
> – Rent documentation
> – Tenant Satisfaction Surveys
> – Annual Reports
> – Training information.

Good Practice Recommendation No. 28
Information Clarity and Accessibility

> ◆ All information provided to tenants should be clear and easy to understand and be written in jargon-free language wherever possible.
>
> ◆ Where it is necessary to employ technical language, such as legal terms, in information documents for tenants, social housing providers should ensure that such language is clearly explained, perhaps in the form of a 'jargon buster' dictionary.

◆ All forms provided to tenants should include a section which asks whether the form was clear and easy to understand and how it could be improved.

◆ Information for tenants should be written in inclusive language which does not offend or marginalise any sections of the tenant population.

◆ In order to ensure that information is accessible to all sectors of the local community, all documentation should have a section or page which provides a statement, written in the main languages spoken by tenants, advising them that the documentation can be made available in their native language if necessary. The statement should also include the contact details and telephone number of a staff member who can arrange this.

◆ To facilitate those with visual impairments, information should also advise of the availability of the document in large print, audio format or Braille upon request.

Good Practice Recommendation No. 29
Information Format

◆ To ensure that tenants are kept up to date with changes that affect them, it is necessary to regularly monitor and review information provided to check that it remains accurate and up-to-date.

◆ Analysis of feedback from tenants in respect of information provided is essential in order to maximise the usefulness of the information and ensure that it reflects local need.

◆ In order to facilitate this process, it is advisable that tenant handbooks should be produced in a ring-binder format so that when information needs to be updated, individual pages/sections can be produced to replace existing ones. This will increase the useful life of the handbook and help minimise production costs in the longer term.

Good Practice Recommendation No. 30

Information Distribution and Updates

◆   New or updated information should be distributed to tenants whenever the social housing provider introduces any changes which directly affects them. This includes changes in policy or service procedures.

◆   Tenant satisfaction information should be obtained and provided to tenants on at least an annual basis.

Good Practice Recommendation No. 31

Including Views of Tenants

◆   In order to ensure that tenant views and experiences of housing management services are reflected in reviews of a housing provider's commitment to continuous service improvement, tenants need to be consulted about their perceptions of the standards of service. The following measures can be used to achieve this:
    – Tenant Satisfaction Surveys
    – Suggestion Slips
    – Repairs Satisfaction Slips
    – Analysis of complaints received
    – Regular meetings between local authority staff, tenants associations and committees and residents to address any particular problem areas of service delivery or policy in practice.

Good Practice Recommendation No. 32

Publicity

◆   Social housing providers should develop strategies to publicise the services that are available to tenants and to publicise their complaints procedure. Mechanisms to do this could include:
    – posters in reception areas
    – leaflet drops
    – open sessions
    – distribution of regular newsletter to keep tenants up-to-date with current issues that affect them.

Good Practice Recommendation No. 33
Website

◆ An effective, well-designed, easy-to-access website will enable social housing providers to impart a wealth of information to tenants on a whole range of services, policies, procedures and events.

◆ Websites can also provide a forum for advice, telephone contact numbers for other relevant service providers and ideas and mechanisms for becoming more involved in policy development and housing management.

◆ Social housing providers should use websites to provide appropriate housing information such as transfer applications and advice on rent payment.

◆ In addition, relevant documentation such as tenant handbooks should be provided on the websites.

Best Practice Suggestion No. 12:
Working Group

◆ Social housing providers may wish to consider establishing a working group to ensure that all information for tenants is reviewed and updated as necessary and that they also refer to good practice. The group should not be too large but include staff and a representative cross-section of tenants and tenant representatives.

Best Practice Suggestion No. 13:
Communications Strategy

◆ Social housing providers who wish to achieve excellence in the provision of information for tenants may consider devising a communications strategy which specifies the content and standards of training and information.

◆ Devising a communications strategy has a number of advantages:
  – It provides the social housing provider with an opportunity to ensure that the training and information provided to tenants reflects wider corporate objectives.
  – It helps to ensure that tenants have clear expectations regarding the kind of training and information they can expect to receive and how they will be engaged in the decision-making process to shape future service delivery that will better meet their needs.
  – It enables social housing providers to adopt a consistent approach to the provision of all types of training and information for tenants.

4.3 TENANCY AGREEMENTS

The tenancy agreement is a consumer contract and also a legal document with consequences for both landlord and tenant. Therefore such a document must contain the legal information necessary to make the tenancy binding and at the same time should be written in clear, simple language. A clear, easy-to-understand tenancy agreement can provide clarity on the legal status and obligations of a tenancy, e.g. by setting out the standards of expected behaviour in relation to the conduct of tenants and their tenancies.

Good Practice Recommendation No. 34
Tenancy Agreements

◆ All social housing tenants should be provided with a tenancy agreement or, if appropriate, a licence agreement. Social housing tenants include occupants of: standard houses, flats, sheltered housing, group housing schemes and halting sites.

◆ Social housing providers should update their tenancy agreements to ensure that they reflect the latest legislative developments and changes in national housing policy and the policy and procedures of the social housing provider.

◆ Tenants should be consulted regarding amendments to tenancy agreements.

◆ The content of the tenancy agreement will depend on local issues such as the housing management policy of the social housing landlord. However, when devising or updating tenancy agreements social housing landlords may find useful the checklist of minimum content which is included on the following page.

◆ Although tenancy agreements are legal documents they should, as far as possible, be written in plain, non-legalistic language.

◆ As part of this process, social housing providers should standardise the conditions of all tenancies by ensuring that all tenants have signed an identical agreement. This may require asking long-standing tenants to sign updated agreements.

Best Practice Suggestion No. 14: Tenants' Rights	◆ Along with tenants' responsibilities, the tenancy agreement can include tenants' rights regarding services that they have a right to receive and their rights in respect of transfer or succession of tenancy.

Tenancy Agreements: Checklist of Contents

Should be included:

GENERAL INFORMATION

◆ Tenant's details (name, previous address) √

◆ Details of social housing provider (name and address) √

◆ Address of property being let √

◆ Tenancy type √

◆ Tenancy commencement date √

◆ Details of any other people allowed to use the property and under what circumstances √

RENT

◆ Amount of rent payable √

◆ Rent period – when the rent should be paid and the frequency of payments √

◆ Rent increases – when they take place and under what circumstances √

◆ Details of what is included in rent payment, e.g. fuel or service charges √

SERVICES

◆ Services the social housing provider will make available, e.g. maintenance of common
  areas of estates and maintenance of dwellings √

◆ Tenant's responsibilities in relation to the maintenance of the dwelling √

TENANCY TERMINATION

◆ Notice period – notice required to terminate tenancy by either the social housing provider
  or the tenant √

◆ Acceptable conduct on the part of the tenant and the other members of his/her household √

◆ Details of anti-social behaviour and racist harassment policies √

◆ Details of consequences of engaging in anti-social behaviour √

◆ Consequences of non-payment of rent √

MAY WISH TO CONSIDER INCLUDING:

Tenant's rights

◆ Regarding services received √

◆ In respect of transfer and succession of tenancy √

4.4 TENANCY SATISFACTION SURVEYS

In order to become more responsive to the needs and aspirations of tenants, social housing providers need to understand what makes tenants satisfied. This will enable them identify the key priorities for improvement of the housing management service. A tenant satisfaction survey is the best means of generating this type of information.

It should be borne in mind that tenant expectations could influence the level of satisfaction expressed about current service provision. A wide range of factors including (among other things) previous experience, word-of-mouth communication, views regarding social housing providers, personal values and beliefs can determine the ultimate level of satisfaction expressed.

Good Practice Recommendation No. 35
Tenant Satisfaction Surveys

◆ Social housing providers should undertake tenant satisfaction surveys on a regular basis in order to:
  – highlight priorities for improvement within a particular service area
  – compare different local authorities providing the same services to enable the benchmarking of performance and the identification of good practice to take place
  – compare different services
  – monitor changes in perceptions and performance over time.

◆ Tenant satisfaction surveys should include questions intended to generate quantitative (or numerical) information on the following:
  – Rating how the social housing provider has performed in a particular area of service delivery
  – Rating tenant's priorities for improvements in the housing management and maintenance service
  – Assessing levels of responsiveness, helpfulness, customer care, reliability and competence of the housing management and maintenance service.

◆ Open-ended questions intended to generate information on the following should also be included:
  – Where problems occurred in the service
  – How the service could be improved in each of the key service areas
  – The success of any reforms to the housing management and maintenance service which have been introduced recently.

◆ The amount of detail that a social housing provider needs to gather in a tenant satisfaction survey largely depends on the amount of information that is already available and the amount of information that the survey needs to generate. Including a large number of questions in a survey minimises the need to carry out repeated surveys, but on the other hand, a very complicated survey can lead to a lower response rate.

◆ The tenant satisfaction survey should be anonymous but it does need to ask for details relating to the background of the respondent (i.e. age, gender, ethnic origin, disability) so that the social housing provider can identify whether certain categories of tenant are more or less likely to be satisfied with the housing management service.

SECTION FIVE

Another key concern to be borne in mind when developing and providing information and training for tenants is the inclusion of under-represented groups who may previously have been overlooked or may have remained uninvolved in training and tenant participation initiatives. These groups may include: older people, members of the Traveller community, BME groups, and people with a disability.

Without fully representative and inclusive consultation mechanisms which reflect the diversity of needs, opinions and experiences of tenants, it is difficult to gain a comprehensive appreciation of how effectively or ineffectively current services meet the needs and expectations of tenants. Therefore, inclusive participation is of paramount importance in terms of achieving good practice in the provision of training and information for tenants.

The discussion that follows looks generally at issues in relation to equality of access to training and information and mechanisms to help increase participation by under-represented groups. It should be recognised that whilst this discussion is made in general terms the needs of these groups and sometimes the individuals within these groups are quite diverse and this must be taken into consideration by social housing providers in all aspects of training and information provision.

ENSURING EQUALITY OF ACCESS TO INFORMATION AND TRAINING PROVISION

5·1 COMPLYING WITH THE LAW

Whilst the ethos and culture of each social housing provider should support the equal provision of services to all tenants, the need to attain equality in service provision is also firmly established in law. The Equal Status Act 2000 outlaws discrimination in the provision of goods and services on nine grounds which include among them: age, disability, race and membership of the Traveller community. As such, social housing providers cannot demonstrate less favourable treatment to any of its tenants and all services provided, including training and information, must be accessible to all tenant groups.

Best Practice Suggestion No. 15: Accessible to All Tenants

◆ Social housing providers should ensure that all information and training provision is accessible to and easily understood by their tenants. This strategy will also help ensure that current legislation in regard to discrimination is complied with. In order to implement this strategy in practice all services should be reviewed from the equality perspective. This would involve assessing whether the service in question is accessible to all tenants.

Good Practice Recommendation No. 36
Staff Training

◆ To help ensure equality of access to training and information provision, all staff, especially front-line staff, should receive equality training. This would involve:

– Inter-cultural awareness
– Disability awareness
– Anti-racism training.

◆ This training has many benefits such as facilitating an increased understanding of cultures which thereby helps to eliminate any prejudices and lack of understanding of cultures and cultural practices that may exist in the organisation and among individual staff members.

Best Practice Suggestion No. 16: Tenant Training	◆ A social housing provider who wishes to achieve excellence in this area of work may wish to consider extending equality training by incorporating it into pre-tenancy courses, when setting up residents associations, in tenant participation initiatives and also within other training provided by the social housing provider.
	◆ This strategy should help break down barriers if they exist between communities as a greater understanding and appreciation of each other's culture evolves.

5·2 MONITORING INCLUSIVE PRACTICE

In order to ascertain whether current training and tenant participation initiatives are inclusive of all sectors of the tenant population, social housing providers need to assess and monitor representative numbers and levels of participation. When such base-line data are compared to the general tenant profile and, where necessary, to the profile of tenants in specific localities, the social housing provider can establish whether any groups are under-represented in training and tenant participation initiatives. It is only when this information is collected and analysed that appropriate mechanisms can be developed to increase the levels of participation from these groups.

The collection of equal opportunities information is key data that social housing providers should seek to obtain in relation to all information-gathering exercises including forms for completion by tenants and service delivery evaluation and in relation to complaints procedures. This can be done through the use of equality monitoring.

Good Practice Recommendation No. 37

Equality Monitoring

◆   Equality monitoring involves the collection and analysis of data supplied by tenants, on their gender, age, disability and ethnic backgrounds. It is a necessary process when addressing equality of access to service provision as it can indicate:
– who is accessing services and information; identified by ethnic categories
– how satisfied they are with the training and/or information received
– how they found out about the service.
.

◆   Equality monitoring will also enable social housing providers to:
– identify under-represented groups
– devise means of increasing representation from these groups
– ensure training and information provision meet the needs of all tenants
– ensure training and information provision is fair and accessible to all groups.

Good Practice Recommendation No. 38

Equality Record Keeping

◆   Social housing providers should collect equality monitoring information as a matter of routine practice from tenants to ensure that accurate base-line information is obtained and maintained.

◆   Documentation and forms should include equality monitoring questions when the documentation being completed is confidential and does not require that name or address be supplied. Such questions should be included on the following types of documents:
– Suggestion slips
– Complaints slips
– Training: participants and evaluation forms
– Members of tenants and residents associations.

◆   The collection of equality monitoring information from various sources helps to ensure that all areas of service standards are monitored for tenant satisfaction and that access to services is also assessed.

◆ Adequate information systems should be established to log this information. Furthermore, there must be a commitment by the social housing provider to update this information on an on-going and regular basis in order to ensure accuracy.

Best Practice Suggestion No. 17: Informing Tenants why Monitoring is Taking Place	◆ It is important to inform tenants why they are being asked for details of their ethnic background, their age or whether they have a disability, etc. Informing tenants of monitoring procedures helps to allay any fears regarding why the information is required and what it will be used for. ◆ This can be done through a number of mediums such as posters in public reception areas or a leaflet given to tenants and applicants when completing forms where monitoring information is required.

5·3 INCLUSIVE PARTICIPATION: KEY QUESTIONS

Once under-represented groups have been identified by a social housing provider efforts must then be made to build relations and increase participation levels among these groups in training and information provision. The questions in Good Practice Recommendation No. 40 below have been applied to the Traveller community but they should be asked in respect of each group that is found to be under-represented by the social housing provider. In this way the social housing provider demonstrates sensitivity to the different and varying needs of each groups.

Good Practice Recommendation No. 39
Assessing Participation

◆ Social housing providers should consider the following list of questions in relation to participation levels of Travellers:

1 Have attempts been made to increase participation levels in training courses and tenant participation initiatives by members of the Traveller community?

2 Have Traveller groups been consulted about the following?
   – Are they aware of the training provided by the social housing provider?
   – How do they wish to participate?
   – Would they attend training courses?
   – What sort of training issues would be of interest to them?
   – Do they find the information provided easy to read and understand?

3　If consultation has occurred, what action has been taken as a result of the information provided?

- – What training would develop the skills of Traveller tenants and promote inclusion? Is such training currently available?
- – What mechanisms are in place to encourage the involvement of the Traveller community?
- – Is the level of representation of the Traveller community increasing in training courses?
- – Are tenants' groups and tenant-run organisations taking steps to improve representation from the Traveller community in their numbers?
- – Has feedback been given to the groups and individuals who have been consulted?

Good Practice Recommendation No. 40
Ask the Individual/Groups

◆　When deciding what tenants from under-represented groups require in relation to training and information the first, and perhaps most important step, is to seek the views of these tenants.

◆　Never assume you know what the needs of groups are.

◆　Never assume that the needs of all under-represented groups are the same or similar. This is particularly important because of cultural differences that exist between BME communities and also in regard to people with a disability. Disabilities are nearly as individual as a person and can vary from physical, mental, sensory, learning or emotional impairment; the needs of each person can therefore vary dramatically.

Best Practice Suggestion No. 18:
Housing Forums

◆ Establishing a Housing Forum for each of the under-represented groups is a positive way of obtaining information regarding the training and information needs of such groups. Each group, through the medium of a forum, would:

– examine their specific needs in relation to training and information
– assist in devising strategies with the social housing provider in relation to how best to meet these needs
– devise strategies on how to increase participation from their group members.

◆ These forums can also have other positive benefits such as the development of better communication and trust between the social housing provider, staff and tenants.

5·4 INCLUSIVE PARTICIPATION: PRACTICAL CONSIDERATIONS

As previously stated, good practice requires that training and information provision is accessible to as many tenants as possible and is available to, and benefits from, the input from as representative a cross-section of the community as is possible.

Setting up a meeting and expecting people to attend may not be successful; there is a need to be proactive when attempting to increase participation levels in under-represented groups and actions need to be taken to meet individuals in order to build confidence and trust.

Outlined below are some practical considerations that social housing providers may find useful when encouraging the participation of under-represented groups and when attempting to ensure equality of access to training and information provision.

Good Practice Recommendation No. 41
Target Participants

◆ Before choosing a venue for a meeting with tenants, whether it be for a pre-tenancy course or for a preliminary meeting of a residents group, you must first ascertain, as far as possible, who are likely to be at the meeting and whether they have any specific needs. Ethnic monitoring systems should help this process. When aware of participants it is necessary to be sensitive to their needs in order to maximise participation from identified under-represented groups.

Good Practice Recommendation No. 42

Venue

◆　The key to best practice is to make training and information accessible to all participants. This is particularly important when selecting a venue for a meeting with tenants or for a training course for tenants.

◆　Consider the use of local schools and community centres for meetings when such are being held locally. Participants are more likely to be familiar and comfortable with these locations.

◆　When deciding upon a venue for meetings with tenants, or indeed with any gathering of people, it is imperative that you visit the venue and check out its suitability.

◆　This practice helps ensure that the venue is accessible and appropriate for all users and has the facilities required such as: access to the building, access to the meeting room, and adequate toilet facilities for persons with a disability.

◆　Where you are familiar with the venue and its resources it is still advisable to visit prior to the gathering to ensure that all access points, toilets, rooms, etc are free from obstructions.

Best Practice Suggestion No. 19:
Venue Register

◆　When venues have been checked for suitability these should be added to an internal register which would contain details such as:
  – number of meeting rooms
  – number of people accommodated in each room
  – whether building is friendly to people with disabilities, e.g. access, parking, lifts, etc.
  – proximity to public transport, etc.

◆　This log will provide a support for future work, helping to speed up the process of choosing a venue, particularly when requiring a local venue in an area.

Good Practice Recommendation No. 43

Timing

◆ All training should be provided at a time that is suitable to those you hope will participate. Considerations should be given to:
   – those who work
   – those who have childcare responsibilities
   – those who have to bring children to school and collect them later
   – people with disabilities who may require time in the morning to get ready or rely on a carer for such assistance
   – local public transport schedules, e.g. time of last bus or train home from venue.

◆ Where possible and appropriate it is good practice to provide training on more than one occasion and in different venues, thereby trying to accommodate the needs of individuals as far as possible.

Good Practice Recommendation No. 44

Transport

◆ The venue chosen should be as close as possible to the homes of those attending the meeting. Where transport will be necessary choose a venue that is close to good public transport links for ease of access by participants.

◆ The venue should also have adequate availability of parking spaces for disabled persons close to its entrance.

Good Practice Recommendation No. 45

Information

◆ When providing training and information for tenants it is important that these are communicated in the range of formats that are required by the tenant profile. Depending on the tenant profile, information may need to be provided in the following:
   – Braille
   – Large print
   – Audio tape
   – Other main community languages apart from English.

◆ It may not be necessary to provide information in all these formats but where a need is established it is suggested that at a minimum all basic information such as tenancy agreements are produced in these media/formats.

◆ Furthermore, it is important to ensure that the language used in information provision and used by training providers and staff is sensitive and acknowledges potential cognitive and literacy difficulties of tenants.

| **Best Practice Suggestion No. 20:** Advertising | ◆ Providing information on available training and placing information, publications and forms in reception areas only is not sufficient to ensure that under-represented groups are aware of, for example, training courses, tenant participation initiatives and available services. Consideration should also be given to the following:
– Providing documentation including application forms and annual reports to representative organisations for these communities. Such material can then be accessed by individuals when using the services provided by these groups
– Advertising forthcoming courses, e.g. budget management, in newsletters and in material produced by representative organisations
– Using local radio stations to make announcements regarding forthcoming courses and inviting participants from all sections of the local tenant profile
– Making application forms and information available on the internet and also providing course details through the medium of the internet. |

Best Practice Suggestion No. 21:
Partnership

◆ Making contact and working in partnership with representative groups or specialised service providers, e.g. BME and older people groups, should be encouraged and will have many benefits for social housing providers when trying to ensure equality of access to services. These groups may be able to:
  – advise on appropriate venues for meetings
  – advise on service improvements
  – advise on accessibility of information
  – advise on information formats required, i.e. community languages, Braille, etc.
  – provide a meeting room which is local to the tenant group and appropriate in terms of physical access for people with disabilities
  – advertise forthcoming training courses and tenant participation initiatives
  – provide translation services at meetings or training events for those tenants in other community languages.

Appendix

Legislation, Publications, Useful Addresses

This section summarises the main provisions of the legislation which is relevant to the achievement of good practice in the provision of training and information for tenants. It also lists some further reading and contact details of organisations which can provide helpful advice to social housing providers on enabling effective tenant training and information provision.

6·1 Training and Information Provision Legislation and Guidelines

Legislation and guidelines on the provision of training and information for tenants do not exist. However, those issued to local authorities in relation to tenant participation are of relevance here.

The majority of legal provisions relating to tenant participation in the local authority housing sector are contained in Section 9 of the Housing (Miscellaneous Provision) Act 1992.

- ◆ *Section 9(1)* – requires local authorities to develop a statement of policy on housing management, and the Department of the Environment and Local Government's (1992) *Memorandum on the Preparation of a Statement of Policy on Housing Management* specifies that tenant involvement in housing management should receive particular attention in these statements.

- ◆ *Section 9(2)* – allows local authorities to delegate some of their housing management, maintenance and control functions to a designated housing body.

- ◆ *Section 9(3)(a)* – specifies the matters which should be contained in a delegation order. These are:
  - The designated body for the purposes of the delegation
  - The functions being delegated to the designated body
  - The dwelling to which the delegation applies.

◆ Section 9(3)(b) – lists a number of matters which a delegation may specify. These matters are broad-ranging and the list includes 'any other related or incidental matters which the housing authority considers appropriate'.

◆ Section 9(5) – allows the local authority to revoke a delegation agreement.

◆ Section 9(6) – states that a delegation of the functions under the Act, and the revoking of delegations, is a 'reserved function' of the elected members of the local authority.

◆ Section 9(7) – defines a designated body as an association, council, committee or other body whether corporate or un-incorporate which is
  – established by and represents tenants of an area within which are located dwellings that are to be the subject of a delegation under this section, or
  – established jointly by such tenants and the housing authority and any other person or body (whether corporate or incorporate) approved of by the authority, and
  – declared by the authority by resolution to be a designated body for the purposes of this section.

Freedom of Information Act 1997, as amended

The Freedom of Information Act 1997 enables members of the public to access information held by public bodies including local authorities. However, the Act stipulates that this right to receive information is subject to some exceptions. From the perspective of combating anti-social behaviour the most significant exception is as follows:

◆ *Section 26* – requires that the head of a public body shall refuse to grant a request for information if the records in question contain information that was given to the body in confidence and on the understanding that it would be treated as confidential, and, in the opinion of the head, the disclosure of the records would be likely to prejudice the provision of further similar information from the same person or from other persons and it is of importance to the body that further similar information should continue to be supplied to it.

Official Languages Act 2003

The Official Languages Act 2003 aims to ensure better availability and a higher standard of public services through Irish; this includes services provided by local authorities. The provisions of the Act which are relevant to training and information for tenants include:

◆ Section 9(1) – which places a duty on public bodies to ensure that the Irish language only, or the Irish and English languages together, are used, on oral advertisements – whether they be live or recorded – on stationery, on signage and on advertisements under regulation to be made by the relevant Minister.

◆ *Section 9(2)* – which places a duty on public bodies to reply to correspondence – in writing or by electronic mail – in the language in which that correspondence was written.

◆ *Section 9(3)* – which places a duty on public bodies to ensure that any communication providing information to the public – in writing or by electronic mail – is in the Irish language only or in the Irish and English languages.

◆ Section 10 – which places a duty on public bodies to publish certain documents that would be of interest to the public, in Irish and in English simultaneously, for example Annual Reports.

◆ Section 11 – which places a duty on public bodies to prepare a scheme detailing the services that they will provide:
– through the medium of Irish
– through the medium of English
– and through Irish and English
and the measures to be adopted to ensure that any service not provided by the body through the medium of the Irish language will be so provided in the future.

◆ and *Section 13* – which places a duty on public bodies to ensure that:
– an adequate number of its staff are competent in the Irish language
– the particular Irish language requirements associated with the provision of services in Gaeltacht areas are met

– the Irish language becomes the working language in its offices situated in the Gaeltacht areas within a certain timeframe to be agreed between the public body and the Minister

Department of the Environment, Heritage and Local Government Circulars, Memoranda and Guidelines

Local Authorities

◆ *Circular LG 9/00* – instructs local authorities to establish procedures to monitor their performance in a range of service area including vacant dwellings, rents and maintenance. Under the terms of the circular and the associated DoELG policy statement – *Service Indicators in Local Authorities* – local authorities are required to collect information on the percentage of their dwellings that are vacant and are (a) available for letting or (b) other, together with information on the average time taken to re-let dwellings available for letting or awaiting minor repairs. The circular suggests that these performance indicators should be measured on a monthly basis with the average monthly measurement shown at year-end.

◆ *Circular TAU 0/01* – sets out the provisions of the Department of the Environment and Local Government scheme of grants for pilot initiatives for the management of Traveller accommodation. The circular identifies Traveller tenant participation as an appropriate focus for a pilot.

◆ *Delivering Value for People – Service Indicators for Local Authorities (2004)* – sets out forty-two indicators against which local authority performance will be monitored annually. This extends the performance indicators previously applied to housing. There are five housing indicators which include:
– housing vacancies
– average time taken to re-let dwellings available for letting
– number of repairs completed as a percentage of the number of valid repair requests received
– average time taken to inform applicants of local authority's decision on applications for the shared ownership and housing loan schemes and in relation to local authority housing
– Traveller accommodation – total number of Traveller families accommodated as a percentage of the targets set in the local Traveller accommodation programme.

Voluntary and Co-operative Housing Providers

◆ Memorandum VHU: 2/02 – outlines details of the terms and conditions of the capital funding schemes available to voluntary and co-operative housing providers. It also looks at related issues including the terms and conditions for management, lettings policies, rents and maintenance of dwellings provided under the scheme.

6·2 PUBLICATIONS

Combat Poverty Agency Publications

Clarke, J. (1993),
Managing Together: A Guide to Working Effectively Together as a Committee,
Dublin, Combat Poverty Agency.

Clarke, J. (1996),
A Guide to Self Evaluation,
Dublin, Combat Poverty Agency.

Clarke, J. (1997),
Strategic Planning, Dublin,
Combat Poverty Agency.

Cullen, B. (1989),
Tenant Organisations and the Media,
Dublin, Combat Poverty Agency.

Harvey, B. (1998),
Working for Change: A Guide to Influencing Policy,
Dublin, Combat Poverty Agency.

Power, M. (1997),
Financial Management for Tenant and Voluntary Groups,
Dublin, Combat Poverty Agency.

Prendiville, P. (1995),
Developing Facilitation Skills: A Handbook for Group Facilitators,
Dublin, Combat Poverty Agency.

Community Workers Co-operative Publications

Community Workers Co-operative (1998),
Strategies to Encourage Tenant Participation: Strategy Guide 3,
Galway, Community Workers Co-operative.

Department of the Environment, Heritage and Local Government Publications

Department of the Environment, Heritage and Local Government (2004),
Delivering Value for People: Service Indicators for Local Authorities,
Dublin, Department of the Environment, Heritage and Local Government.

Department of the Environment and Local Government (2000),
Modernising Government: The Challenge for Local Government,
Dublin, Department of the Environment and Local Government.

Department of the Environment and Local Government (2000),
Service Indicators in Local Authorities,
Dublin, Department of the Environment and Local Government.

Housing Management Group (1996),
First Report,
Dublin, Department of the Environment and Local Government.

Housing Management Group (1998),
Second Report,
Dublin, Department of the Environment and Local Government.

Housing Unit Publications

Brennan, B. (2000),
*Good Practice in Housing Management: Guidelines for Local Authorities –
Repair and Maintenance of Dwellings,*
Dublin, Housing Unit.

Clarke, J. and Norris M. (2001),
*Good Practice in Housing Management: Guidelines for Local Authorities –
Rent Assessment, Collection, Accounting and Arrears Control,*
Dublin, Housing Unit.

Norris, M. (2001),
*Good Practice in Housing Management: Guidelines for Local Authorities –
Managing Voids: Co-ordinating the Monitoring, Repair and Allocation of Vacant
Dwellings*,
Dublin, Housing Unit.

Norris, M. (ed) (2001),
Good Practice in Housing Management: Guidelines for Local Authorities –
Managing in Partnership: Enabling Tenant Participation in Housing Management,
Dublin, Housing Unit.

Irish Council for Social Housing Publications

Irish Council for Social Housing (1996),
Tenant Participation in Housing Management: Handbook,
Dublin: Irish Council for Social Housing.

6·3 USEFUL ADDRESSES

Department of the Environment,
Heritage and Local Government
Custom House, Dublin 1
Tel: 01-8882000
Fax: 01-8882888
Website: www.environ.ie

Combat Poverty Agency
Bridgewater Business Centre
Conyngham Road
Islandbridge, Dublin 8
Tel: 01-6706746
Fax: 01-6706760
Website: www.cpa.ie

Irish Council for Social Housing
50 Merrion Square East
Dublin 2
Tel: 01-6618334
Fax: 01-6610320
Website: www.isch.ie

National Association of Building Co-operatives (NABCO)
50 Merrion Square East
Dublin 2
Tel: 01-6612877
Fax: 01-6614462
Website: www.nabco.ie

Money Advice and Budgeting Services (MABS)
MABS offices are located nationwide. Details of local offices and their contact details
can be found on their website.
Website: www.mabs.ie

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