

SWT Tenants Strategic Group

Monday, 25th July, 2022,
6.00 pm

**Somerset West
and Taunton**

The John Meikle Room - The Deane
House

[SWT MEETING WEBCAST LINK](#)

Members: Alex Akhigbemen (Chair), Jessie Bunn, Paul Cram,
Colin England, Kevin Hellier, Ivor Hussey, Luke Manning,
Samantha Rickward, Mark Lithgow, Janet Lloyd and
Francesca Smith

Agenda

- | | |
|--|-----------------|
| 1. Apologies | |
| 2. Welcome from the Chair | |
| 3. Minutes from previous meeting | (Pages 5 - 8) |
| 4. Update on the voids workshop lean process | (Pages 9 - 30) |
| 5. Housing Ombudsman Self assessment | (Pages 31 - 52) |
| 6. Finance Out turn report | (Pages 53 - 56) |
| 7. Directorate Report | (Pages 57 - 64) |
| 8. AOB | |



ANDREW PRITCHARD
CHIEF EXECUTIVE

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SWT Tenants Strategic Group - 30 May 2022

Present: Councillor Alex Akhigbemen (Chair)

Councillors Jessie Bunn, Paul Cram, Colin England, Ivor Hussey, Luke Manning, Samantha Rickward, Mark Lithgow and Janet Lloyd

Officers: James Barrah, Stephen Boland, Chris Brown, Ian Candlish, Shari Hallett (Housing Performance Manager) and Sharon Sloan

Also Present: Councillors

(The meeting commenced at 6.02 pm)

43. Apologies

Apologies were received from Kevin Hellier.

Officers Simon Lewis and Sharon Yarde had also offered their apologies.

44. Welcome from Chair

The Chair welcomed everyone to the meeting.

45. Notes from previous meeting

The Chair raised a query in relation to the matter of the communal lights not working in Kelway Road as this was raised two months ago and was still not rectified.

Cllr Lloyd requested that, as an Appointed Member by the Independent and Greens Group she be recorded in the membership of the Group in the minutes, rather than being also in attendance.

46. Appointment of New Chair

The Chair advised that this would be his last meeting, and that Luke Manning had agreed to take over the Chair role, starting on 1st June 2022. He would remain on the Group and be willing to support the new Chair.

Ivor Hussey put on his record his thanks to the Chair for his service.

The Housing Portfolio Holder and Director for Housing also placed on record their thanks to Alex Akhigbemen for his work over the past few years, and looked forward to working with the new Chair.

47. Annual complaints Report

The report provided:

- Headlines from April 2021 to March 2022. This report was an Annual Report and flowed from the weekly complaints reported to the Housing Senior Management team and wider process of stages to this report.
- The Council was governed by the Housing Ombudsman Code.
- In the last year a Housing Performance team which had been set up to help manage complaints.
- A Redress Policy had been introduced in June 2021
- There had been 331 Stage 1 Complaints and 34 Stage Complaints. Stage 2 complaints could be very complex. It was being explored whether a Tenants Panel could be created to consider these.
- All Managers had undergone complaints training.

During discussion of this item the following points/questions were raised; (summarised):

- Did the Council undertake a post-inspection of repairs following a complaint?
- *It was confirmed that this was not done, but residents would be surveyed.*
- 18 percent of complaints about staff conduct and 1 percent about unfair treatment were considered concerning.
- *Officers were happy to seek to share further details on these to reassure Group members on these.*
- The report was praised for its quality. The number of complaints upheld was concerning however, with personal experience of issues with getting issues raised via the telephone.
- *Officers recognised that there was issues with the volume of calls being dealt with by the Customer Services teams. In terms of complaints it was recognised that the service was not where it wanted to be due to issues around Covid and Staff turnover which were being addressed.*
- It was posited that a large number of complaints were down to issues with staff being adequately trained for their roles and being able to engage with tenants. Communication was a major concern.
- *The feedback was welcomed and the service was learning from its complaints. An example was given in the reduction of tenancy complaints and the improvements seen there.*
- Further information was sought on the specific recommendations made by the Housing Ombudsman in those cases where they had intervened and whether there was any fines levied.
- *Further detail could be provided in a written answer.*
- A question was posed on how many complaints related to Voids?
- *Further detail could be provided in a written answer.*

The report was noted.

48. **Q4 Performance Report**

The Report provided provided an update on the housing performance through key performance measures and financial information for the fourth quarter of 21/22 (January to March 2022).

During discussion of this item the following points/questions were raised; (summarised):

- In terms of Anti-Social Behaviour, did the Council liaise with the Police and have procedures in place like other Councils in the South West?
- *Officers outlined the procedures that the Council had in place, with two specific staff members in the Tenancy Management team dealing with ASB. The Council emphasised a multi-agency approach to the issue.*
- Concern was raised on the length of time for voids to be re-let and the lengthy delay for particularly those in Woolaway properties awaiting their alternative offered property.
- It was recognised that Woolaway's were not a standard type of property.

The Report was noted.

49. **Planned capital works for year, alongside retrofit approach presentation – Ian Candlish & Chris Brown (Informal agenda item,(presentation to be given on the night)**

The Reports provided information on the planned Capital works for the year ahead and further information on the retrofit approach for the Council. Group Members were provided with case studies based on their own properties factors and the SAP/EPC scores. Group Members were being counselled specifically for their input into the Strategy, raising customer awareness, embedding good practice to enable access to homes, promoting of better practices to support those with additional requirements and approaches to collect monitoring data to evidence benefit. A Task and Finish Group was proposed to be set up from a range of partners was sought and volunteers were requested.

During discussion of this item the following points/questions were raised; (summarised):

- It was raised that parking was a major issue in Sheltered Housing, with Emergency Services unlikely to be able to gain passage through blocked roads. Could this be looked at as a priority in specific areas where it was a safety issue?
- *Officers would look at this as a priority but unfortunately it was a case of prioritization, with parking just but one. It was recognised that certain areas were under pressure, with STAR survey comments highlighting this. Officers hoped that the under-utilised garages could meet some of this demand. An update was given in relation to the specific design issues with Leycroft Road.*
- A concern was raised on the procurement processes for obtaining temporary workers to deal with the Capital Works backlog and the potential for extra costs associated with this.
- *The Council had undertaken a fully compliant procurement exercise for this contract. The intention was to seek a longer-term arrangement to seek best value for the Council.*
- *In terms of the Asbestos works, it was confirmed that the Council regularly inspected those areas where it was encapsulated to ensure there was no*

damage or risk of contamination and this was why it was included in the Capital Programme.

- It was requested that Tenants Action Group were invited to be involved.

The Report was noted and certain Group Members notified Shari of their willingness to serve on the Task and Finish Group being setup.

50. **Directorate Report**

The Director introduced his Directorate Report and gave a brief update on matters related to Local Government Re-organisation. This was starting to draw on more officer time to ensure the new organisation stood up successfully.

The Report was noted.

51. **AOB**

A request for information on the opening of the Wellington Office opening?

- *A written answer would be provided.*

(The Meeting ended at 8.15 pm)

Somerset West and Taunton Council

Tenants' Strategic Group: 25th July 2022

Council housing voids – information report.

This matter is the responsibility of Executive Councillor Member for Housing.

Report Authors: Tony Knight and Oliver Warcup

1. Executive Summary / Purpose of the Report

This report provides members with information on our void property performance in relation to the council owned housing stock.

Statistical information covering the period 2020 - 2022 is provided, with a specific focus on the month of June 2022.

The Council's approved lettable and returns standard for voids is set out in Appendix 1

2. Recommendations

The Tenants' Strategic Group is asked to note this report and are invited to ask questions.

3. Background

Definition of a void

The term 'void' is used to describe a council house which is currently empty and either available for letting or being prepared for letting.

Normally, a property is officially classified as void at the end of the notice period (when a tenant terminates a tenancy) or where it becomes proven that a tenancy has been abandoned. A property can also become void following the execution of a Warrant for Possession.

It is a condition of the council's tenancy agreement that all tenants give four weeks' notice of their wish to terminate their tenancy. However, some tenants fail to do so and leave the property without giving formal notice.

A council house may be empty for other reasons and not be officially classified as void, for example, where a tenant is in hospital.

The way in which void properties are managed is important for a number of reasons:

- The need to use available council housing for those in housing need;
- The negative impact void properties can have on the local community; and
- The loss of rent, reducing the income to the Housing Revenue Account (HRA) for management and maintenance spend.

Void performance information for the period April 2021 to March 2022:

Total number of new lettings.	350
Average void turnaround time. (major works)	69.3 calendar days
Average void turnaround time. (minor works)	40.6 calendar days
Average void turnaround time overall.	54.9 calendar days
% of new tenants satisfied with the lettable standard of the property.	96%

A 'snap shot' of our void performance for the month of June 2022

Total number of voids.	57
Total number of new lettings.	20
Average void turnaround time. (major works)	54.1 calendar days
Average void turnaround time. (minor works)	27 calendar days
Average void turnaround time overall.	39.9 calendar days

% of new tenants satisfied with the lettable standard of the property.	100%
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Average re-let times.

The average re-let time for council properties was 54.9 days, which exceeded our target of 44 days. The average target was achieved in March and recent months have continued to show an improvement, which is encouraging.

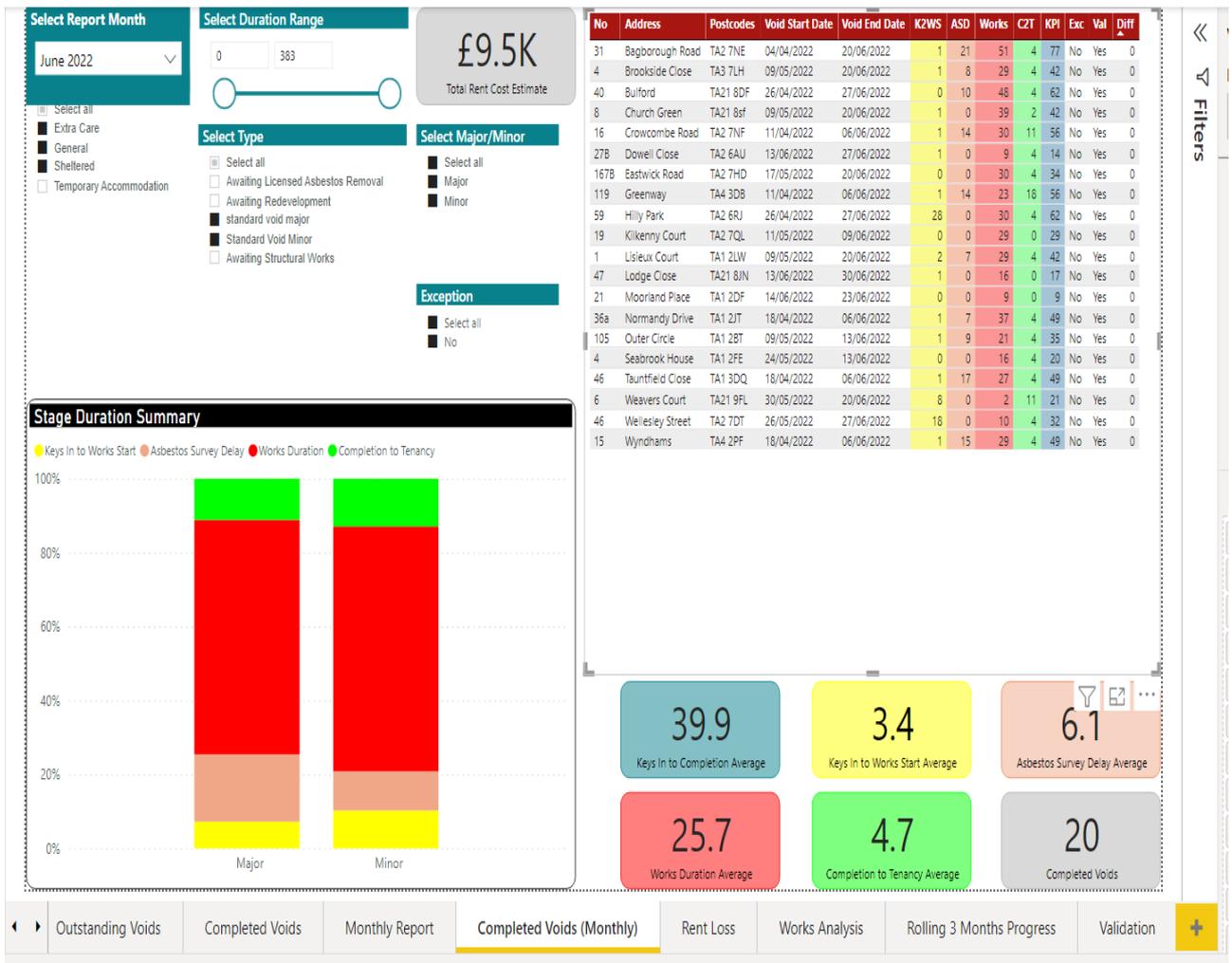
This has been a challenging time for void management and all Housing Providers across Somerset have struggled with increasing void times. Common factors include scarcity of key tradespeople (such as electricians), both in-house and through external contractors, many of whom have been attracted to other work such as Hinkley; Refocussing trades staff to clear repairs backlogs built up during the pandemic; lack of availability of some materials, which inevitably holds up work. For SWT, we have also noted a higher proportion of Major Voids (compared to Minor Voids) which skews our turnaround times higher. That said, we are progressing against our plan to improve void turnaround times. The plan includes:

1. Strengthening our approach with departing tenants to ensure they leave the property clean and tidy
2. Providing decoration packs for qualifying tenants, rather than undertaking full redecoration to let the property quicker
3. Investigating how we streamline the asbestos process to reduce delays due to surveys and works
4. Implementation of the voids module on Open Housing which will allow improved performance management of the overall voids process
5. Look to undertake major capital works as part of the capital programme where possible, after the tenant moves in, rather than during the void. This will also be more cost effective through economies of scale.
6. Explore voids inspections and scheduling software that can lead to a more efficient inspection and scheduling of trades staff into the properties and flag up capacity issues to allow earlier resolution.

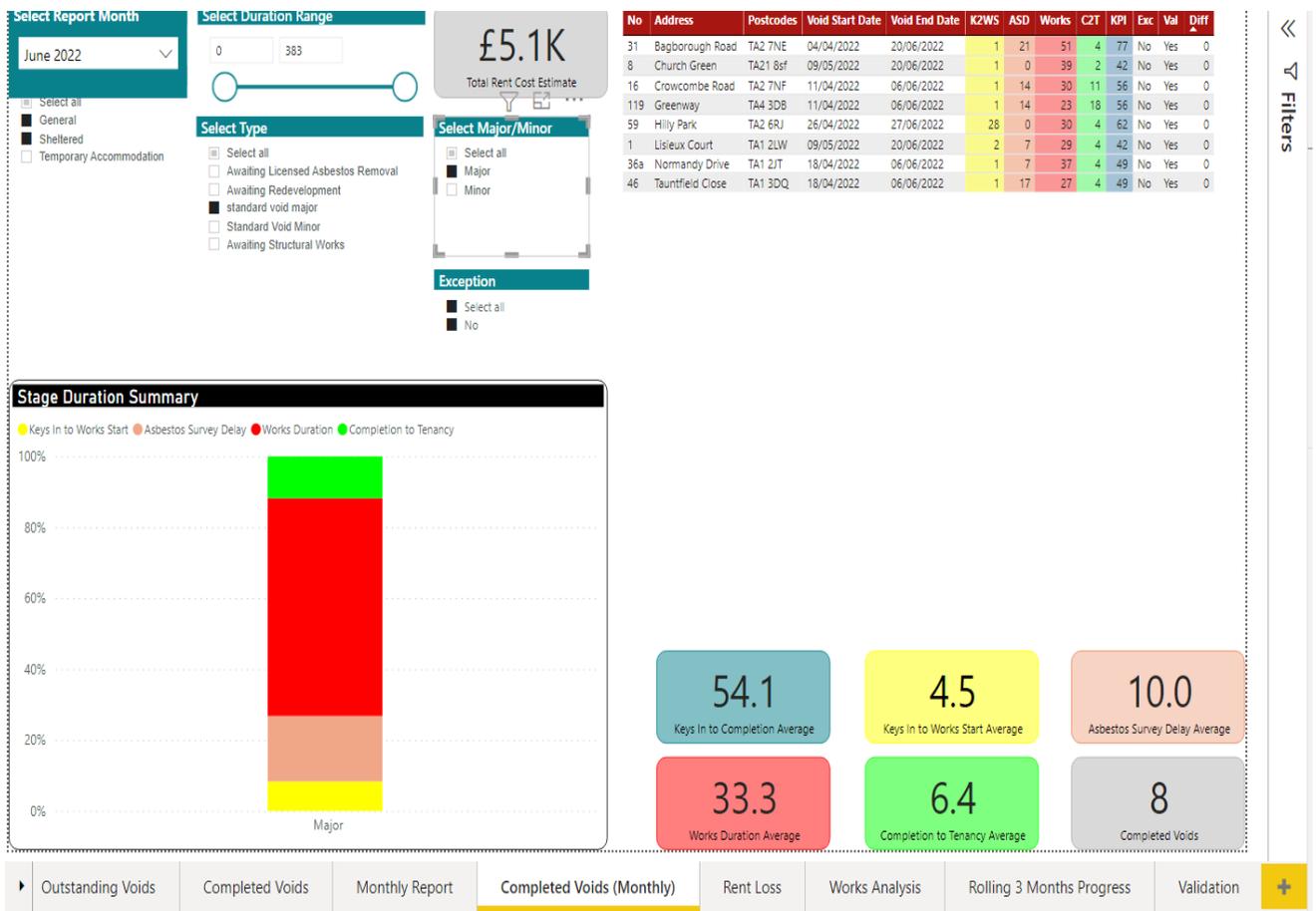
The 44-day target was set in December 2020 and was based on Quarter 2 Housemark metrics that showed a median performance of 44.5 days for District Councils that held housing stock at that time. Housemark data now shows District Council average void turnaround time has increased to 49.8 days by Quarter 4 of 2020/21. Reasons for this increase across the sector are described above.

The Housing Management team monitors wider metrics to give a rounded view of performance with respect to voids. The Pulse data for March 2022 places us in the top quartile for the indicators “Proportion of dwellings vacant, but available to let”, and ‘Proportion of social homes let”, so our performance overall does give confidence that although improvement is required, we are not significantly out of step with other Housing Providers.

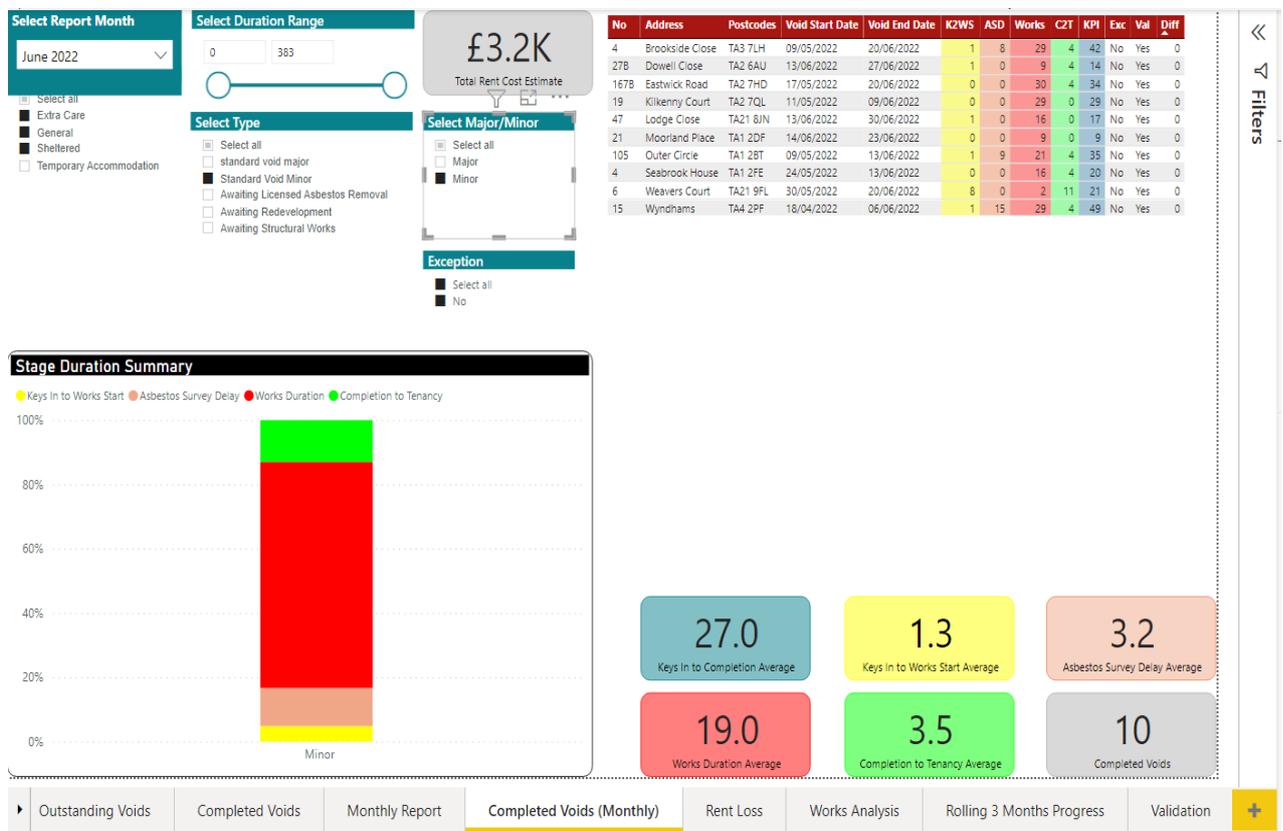
A dashboard displaying further detail on our void performance for the month of June 2022 – relating to our overall performance for major and minor voids:



A dashboard displaying further detail on our void performance for the month of June 2022 relating to major works voids:

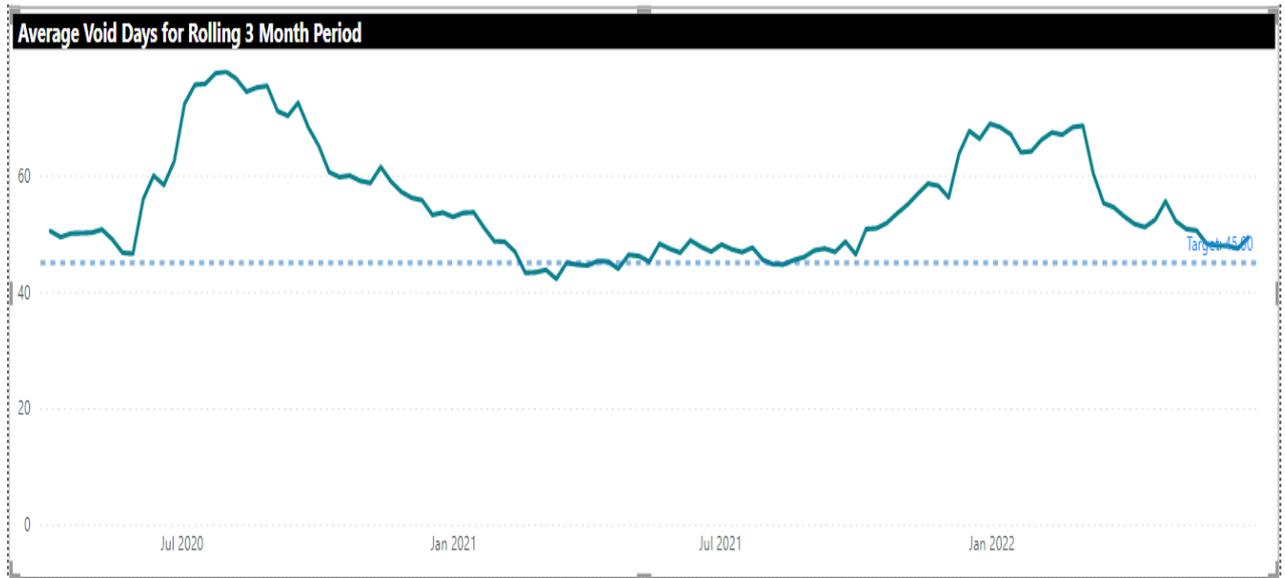


A dashboard displaying further detail on our void performance for the month of June 2022 relating to minor works voids:



A chart displaying our average overall void performance in calendar days throughout 2020 to 2022:

Note: The overall performance target throughout the 2020 - 2022 period = 45.00 calendar days.



Lettable and Returns Standard

The council's Lettable and Returns Standard has recently been reviewed with a new standard approved in May 2022. The standard is intended to give our tenant's satisfaction that their new home will meet an agreed standard before it is re-let and ensure the consistent quality of each property. A copy of the lettable and returns standard is attached at Appendix 1.

4. Risk Assessment

A risk assessment is not required to accompany this report.

5. Are there any Finance / Resource, Legal implications directly to do with this report?

There are no financial implications directly to do with the recommendations in this report

6: Are there any Equality and Diversity Implications?

There are no equality implications directly to do with this report

7. **Are there any Data Protection Implications?**

There are no equality implications directly to do with this report

Contact details for officers:

Officer Name Tony Knight – Lettings Manager

Direct Dial No. 01823 219581

Email address a.knight@somersetwestandtaunton.gov.uk

Officer Name Oliver Warcup – Operational Lead Localities

Direct Dial No. 07392280870

Email address o.warcup@somersetwestandtaunton.gov.uk

Officer Name Stephen Boland – Housing Landlord Specialist

Direct Dial No. 01823 219503

Email address s.boland@somersetwestandtaunton.gov.uk

Appendix 1 – Lettings and returns standard



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This lettable standard sets out what tenants can expect from Somerset West and Taunton Council when they first move into a new home. This is our **minimum standard**. You can expect to live in a good quality home where you feel safe, warm, and secure and where you can thrive.

Before you move in, we will have checked your new home to make sure it is in good repair and all the installations are in good working order.

Your feedback is important to us and helps us to continue improving our service. Please take a few moments to complete the satisfaction survey, this will be sent to you at the beginning of your tenancy.

Kitchens

The kitchen will be functional with doors, drawers and worktops that are securely fitted, allowing you to take proper care of them.

- A cooker space will be available for either an electric or gas cooker. **Please note:** You will need to arrange for your cooker to be connected by a qualified electrician or gas safety engineer.
- Where kitchen space is limited, there will be at least a sink unit, a double kitchen floor unit and a double kitchen wall unit.
- Unless communal laundry facilities are provided, a space will be provided for a washing machine. This will include plumbing and drainage. You will need to arrange to have your washer connected to the services by a plumber.



There will be at least a worktop and two electric sockets inaccessible locations.

- There will be at least one row of splash back tiles around the sink and worktop, with no cracks.
- There will be a good seal around the sink and worktops.
- Natural or mechanical ventilation as fitted, will be fully operational.
- All plumbing and drainage will be in good working order and free from blockages or leaks.

Bathrooms

- At least a toilet, bath or shower and hand wash basin.
- All bathroom fittings will be securely fixed and free from cracks and stains.
- Toilet seats will be chemically cleaned or



renewed.

- There will be at least one row of splash back tiles around the bath and hand wash basin, with no cracks. There will be a good seal around the bath.

- Where a shower is fitted, a shower curtain or screen will be provided. The hose and handset will be clean and defect free.
- All plumbing will be free from defects and leaks and all taps will be in good working order.
- The basin and bath will be surrounded by an intact tiled splash back, with an effective seal.
- Where a shower is to be retained, intact and effectively sealed tiles should be affixed to the whole spray area. Any missing or broken tiles will be replaced in a sympathetic style and colour.
- The washbasin and bath will have a plug and chain attached.
- **Please note:** In our Extra Care properties, a wet floor or level access bathroom will be installed.
- Natural or mechanical ventilation as fitted will be fully operational.

Windows and doors

- Windows and external doors will be secure, watertight and free from defects.
- A key will be provided for all doors and windows that have locks fitted.
- Internal doors will be free from defects and will function properly.
- All skirting boards, door frames, architraves and moldings will be in place. All woodwork will be wiped down.

Walls and ceilings

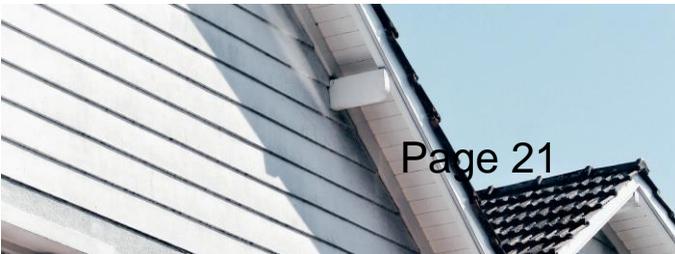
- Walls will be graffiti free, safe and free from large cracks and holes.
- All visible plaster work will be intact and ready for redecoration.

Exterior

- Roof coverings, chimney stacks, soffits, fascias, rainwater pipes, drains and gutters will be fixed securely and in good working condition - all free from leaks or blockage.
- External walls and roofs will prevent water penetrating your home.
- Footpaths, steps and handrails or other means of access within the boundary of your home will be safe for the purpose of travelling to and from your home.
- Lawns will be cut, and gardens will be free of rubbish. Trees and bushes will be clipped.

Cleanliness

- Before you move in, all rubbish, furniture and carpets will be removed internally and externally, unless agreed otherwise.
- Kitchen units, kitchen work surfaces, bathroom fittings, cupboard doors and frames, windowsills, skirting boards, fire surrounds, radiators, tiles, floors and the insides of windows will be clean.
- We will resolve any issues with damp or mould growth.
- We will sweep and wash all the floors.
- All tiled surfaces including grout will be cleaned and mould free.



Floors and stairs

- Floors and staircases will be free from structural defects, holes and trip hazards.
- Bathrooms and kitchens will have securely fitted and fixed washable floor coverings.
- Stairs, balustrades and handrails will be safe, secure and in place before you move in.

General

- All smoke alarms will be operational in line with current regulations.
- All gas appliances will be supplied with instructions.
- If a property has previously been adapted for customers with individual needs (such as installing a level access shower) then we will retain this feature so that other customers can benefit from it.
- For this reason, this type of adaptation would not be removed and replaced with a bath after you have moved into the property.
- Details on how to find the consumer unit (fuse box) and water stop tap will be present at the property.
- Where fitted, all fire doors will function correctly.
- Control entry systems to blocks of flats will function correctly.
- Loft spaces will be insulated. The loft will be secured.
- Communal television aerials will be maintained in good working order.
- Our newly built homes are built to a high standard set by the Council. A new property will be checked against this standard before being let. Our standards often exceed those set by building regulations (for example, standards relating to space and thermal insulation).
- A newly built home will have a twelve month 'defects period', during which the contractor will be asked to carry out any corrective work required. If you rent a newly built home from the Council, you will continue to report repair and maintenance issues through the normal route.
- **Please note:** Our Temporary Accommodation units come with some additional fittings and furniture.

Services

- There will be at least one form of heating in good working order.
- There will be access to hot water.
- Any present gas supply will have been safety checked.
- The electrical system and any landlord supplied appliances will have been safety checked. You will receive a copy of the electrical certificate.
- Any present gas supply will be uncapped. You will be given a copy of the gas safety certificate.
- **Please note:** Our Sheltered and Extra Care properties will be decorated throughout.
- **Please note:** Where the surveyor for General Needs properties decides that the decoration is in poor order, we will issue decoration vouchers.

Returns Standard

We need to let our empty properties quickly to those waiting for a new home. Please help us by making sure your home meets our moving out standard.

If we do have to do work, we will re-charge you for that work. Somerset West and Taunton Council tenants may have an application to transfer internally withheld not be allowed to move until the property meets this standard.

Clear it

- You must leave the premises (including any Council fixtures) in a reasonable state of repair and decoration.
- You must ensure that the property and garden are left in a clean and tidy condition.
- Under the terms of your tenancy, you must remove all personal possessions, including rubbish and debris. The Council will dispose of any rubbish or items left within the property or garden. We will recharge you for this.
- You should dispose of rubbish and unwanted items responsibly, by using one of the household waste and recycling centers.
- Various local organisations welcome donations of furniture. For example: charity shops, Freecycle or Facebook groups. It is a great way of reducing landfill waste.
- The Council will also collect up to 5 bulky items for a fixed price.
www.somersetwaste.gov.uk.

All keys need to be returned by 10 am on the Monday of your departure to avoid another weeks rent. All keys and utility and cards will be collected.

The property will be checked, and locks changed.



Clean it

- Have a good clean up especially in the bathroom and kitchen which gets the most wear and tear.
- Leave the property clean and how you would like to find it.
- Make sure the garden is well maintained and left tidy. Any trees or hedges should be trimmed back, and the grass cut.
- Clean kitchen units including around the cooker, bath, sink and toilet, sweeping up the floors.

Repair it

- Contact us so we can arrange to deal with repairs before you move out on 0300 304 8000.
- If you have broken or damaged anything you will need to repair it yourself. If we carry out the repair after you have moved out, you will be re-charged.

Remove it

Any alterations that you wish to carry out to the property during your tenancy must be approved by a Housing Officer beforehand by completing a Property Alteration Form and submitting it to us. Any alteration must be compliant with building regulations and service standards. The work will be checked by us on completion. Unauthorised alterations will be removed and the cost to reinstate the work will be charged to you.



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Somerset West and Taunton Council

Tenants' Strategic Group – 25th July 2022

Housing Ombudsman Complaint Handling Code - Self-Assessment update

This matter is the responsibility of Executive Councillor Member for Housing.

Report Author: Claire Reed, Case Management Lead – Housing Performance and Improvement

1. Executive Summary / Purpose of the Report

The report is to update the Tenants' Strategic Group on work currently being undertaken by the Housing Performance team, to ensure that the directorate is compliant with the Housing Ombudsman's revised Complaint Handling Code by 1st October 2022.

2. Recommendations

The Tenants' Strategic Group is asked to note this report and are invited to ask questions.

3. Background and Full details of the Report

The Complaint Handling Code sets out good practice that will allow landlords to respond to complaints effectively and fairly. The Code was introduced as part of the Ombudsman's new powers in the revised Housing Ombudsman Scheme. Key areas of the code include a universal definition of a complaint, providing easy access to a landlord's complaints procedure and ensuring fairness in complaint handling. The Code also helps landlords to take steps to put things right and offer appropriate remedies, as well as creating a positive complaint handling culture through continuous learning and improvement and putting an audit trail in place to demonstrate learning and compliance.

In March 2021 the Housing Performance team started overseeing, coordinating and responding to all complaints received by the directorate, to provide accountability and ownership of the process and to improve the service we provide to residents. The recruitment of a Senior Case Manager (who has been tasked with driving our complaint performance forward), has helped the directorate to own, prioritise and learn from the complaints we receive.

The Housing Ombudsman launched the Complaint Handling Code in July 2020, with revisions in January 2021 and most recently in April 2022. The amended Code aligned with the Government's Social Housing White Paper. Until its revision in April, we had been fully compliant with the

Complaint Handling Code. The recent review of the Code has created a number of action points that we now need to address, so that we are once again fully compliant. The Housing Ombudsman expects landlords to be aligned with the new Complaint Handling Code by 1st October 2022.

The Housing Ombudsman acknowledges that there may be reasons why a landlord is unable to fully comply with the Code for reasons which are beyond their control. For example, as a local authority landlord, our complaints handling falls under the Council’s Complaints Policy. The terms of the wider Complaints Policy are not as ‘housing centred’ as the Code prescribes, and the policy is subject to greater democratic controls. However, it is acceptable to the Ombudsman for the landlord to explain in their self-assessment why compliance cannot be achieved under these circumstances.

To evaluate compliance, landlords need to complete a self-assessment of the Complaint Handling Code annually, which should be made accessible to the public and tenants, and which can be scrutinised by the Housing Ombudsman at any time. The Housing Performance team have committed to carry out a self-assessment against the Code every six months, to facilitate best practice and ensure continued compliance.

The revised self-assessment document sets out *mandatory ‘must’ requirements* (whereby compliance with the Complaint Handling Code is only achieved where the landlord can answer all mandatory requirements in a positive regard); and *best practice ‘should’ requirements*, which are not mandatory, but compliance with these criteria will demonstrate a robust complaints handling culture.

In June 2022, the Council’s Customer Experience Manager and the Performance team’s Senior Case Manager carried out the first self-assessment since the Complaint Handling Code’s revision. Following completion of the self-assessment, we have set out a list of actions that require completion between now and 1st October 2022 to ensure that we are compliant.

The completed copy of the self-assessment document can be found at Appendix B and should be read in conjunction with this report.

Findings of the self-assessment (June 2022):

Following completion of the self-assessment, we are pleased to report that the Housing directorate are already 84% compliant with the *mandatory ‘must’ requirements* of the Housing Ombudsman Complaint Handling Code, and 74% compliant with the *best practice ‘should’ requirements*.

The actions we have identified are as follows:

1. Definition of a complaint:

Code section	Mandatory / best practice	Action
1.7	<i>m</i>	We are already compliant, but as a service improvement we will add wording to website that we will accept a complaint unless there is a valid reason not to.
1.9	<i>m</i>	We are already compliant, but we will include wording on website about the right to seek advice from the HO.

1.5	<i>bp</i>	We will ask Acuity to add wording to our surveys that where a survey respondent is dissatisfied, they can pursue the matter as a complaint if they wish.
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2. Accessibility and awareness:

Code section	Mandatory (m) / best practice (bp)	Action
2.3	<i>m</i>	We are compliant but as an improvement, we will add wording to website to say the policy is available in different formats upon request.
2.4	<i>m</i>	We are compliant, but as an improvement we will add further links from the Housing pages of the website to the Complaints Policy.
2.6	<i>m</i>	Work is already ongoing as we are now including complaint and HO information in our tenant communications. We will add web links to the Complaint Handling Code and self-assessment and include information in future correspondence. First report will be presented to TSG July 2022.
2.8	<i>m</i>	We currently advise at stage 2 that residents can access the HO but we will amend wording as part of stage 1 template.

4. Complaint handling principles:

Code section	Mandatory (m) / best practice (bp)	Action
4.2	<i>m</i>	We are not able to add extra text to our acknowledgement as current Council IT system restricts characters. We are unable to comply with this part of the Code at present. We currently include complaint understanding and outcome sought as part of complaint response or during complaint investigation. Plans are in place as part of LGR to change the complaints handling IT system. We will revisit this clause in Autumn 2022 with a view to incorporating a more in depth complaint acknowledgement at that point.
4.13	<i>m</i>	We are not able to comply with this clause of the Code as the Housing service currently sits under the wider Council's Complaints Policy, and timescales are not included. The new Somerset Council Complaints Policy is currently in draft form. We will ensure that the Housing Addendum incorporates timescales and will revisit this in the Autumn.
4.4	<i>bp</i>	We have identified an action that a 'Put Things Right' informal complaints process would further improve our performance. We will include this in the new Somerset Council Housing Addendum section of the Complaints Policy.

4.17	<i>bp</i>	We will consider the guidance available from the LGO on supporting staff who have been complained about, and apply this to Housing to ensure staff are supported and engaged.
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5. Complaint stages:

Code section	Mandatory (m) / best practice (bp)	Action
5.1	<i>m</i>	Our Complaints Policy and handling procedures are compliant (stating stage 1 is 10 working days) but we recognise we still have work to do in this area as our performance figures have not met our target. Currently being worked on by the Performance team. We will also incorporate a 5 day complaint acknowledgement time into our complaint handling process (in line with the Complaint Handling Code) in addition to the 10 working day response time.
5.3 & 5.15	<i>bp</i>	We will include in our processes that we will provide HO contact details where an extension period cannot be agreed at stage 1 or stage 2.
5.8	<i>m</i>	We are compliant at stage 2 as we ensure that the bullet points in this clause are included. We recognise that we need to be more consistent at stage 1. We will add details into response templates with immediate effect and advise complaint managers of the HO expectations. We are already working on training which will set out a good complaint response.
5.10	<i>bp</i>	It is part of the Senior Case Manager's project work to set out an understanding of issues and outcomes sought at stage 2 and become consistent in our approach.
5.13	<i>bp</i>	As 5.1, our Complaints Policy and procedures are compliant (stating stage 2 is 20 working days to respond) but our performance figures do not reflect this. We will continue to focus on improving.

7. Continuous learning and improvement:

Code section	Mandatory (m) / best practice (bp)	Action
7.3	<i>bp</i>	We will liaise and agree the appointment of someone with lead responsibility for complaints, to support a positive complaint handling culture. Likely to be fulfilled by the Housing Portfolio Holder
7.4	<i>bp</i>	We have identified that more work is needed on reviewing trends as the data is not yet available apart from on an ad hoc basis – this work is ongoing with the Senior Case Manager's project work. We will share the HO annual report with TSG and Housing Briefing.

7.5	<i>bp</i>	We recognise that we need to tighten our processes and the logging of themes. At the moment this is on an ad hoc basis (for example. fencing and pest control) but we recognise that a better audit trail to identify and track systemic issues is needed.
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8. Self-assessment and compliance

Code section	Mandatory (<i>m</i>) / best practice (<i>bp</i>)	Action
8.3	<i>m</i>	The self-assessment will be reported to TSG and the Portfolio Holder for Housing. We will include the assessment in our newsletters, 6 monthly and annual reports and Housing Briefing.

Many of the actions that we have identified above are considered 'simple fixes', in that we need to revise some of the wording on the website, or work is already being carried out by the team to improve our processes in line with the Code.

The creation of a new Complaints Policy as part of the Local Government Review will give us the opportunity to include some of the Housing Ombudsman Complaint Handling Code requirements into the new policy, by means of a Housing Addendum.

Additionally, with the creation of the Senior Case Manager role in November 2021 and the recent appointment of a dedicated complaints handling Case Manager, we are confident that we will be compliant with all mandatory elements of the Complaint Handling Code by October 2022.

We will provide a further report to TSG with an update on this matter in November.

4. **Risk Assessment (if appropriate)**

A risk assessment is not required to accompany this report.

5. **Are there any Finance / Resource, Legal implications directly to do with this report?**

There are no financial implications directly to do with the recommendations in this report

6: **Are there any Equality and Diversity Implications?**

There are no equality implications directly to do with this report

7. **Are there any Data Protection Implications?**

There are no equality implications directly to do with this report

Name of Contact Officers: Claire Reed

Telephone number: 01823 217505

Email address: c.reed@somersetwestandtaunton.gov.uk

Appendix B – Self-Assessment Form

This self-assessment form should be completed by the complaints officer and discussed at the landlord’s governing body annually.

Evidence should be included to support all statements with additional commentary as necessary.

Explanations must also be provided where a mandatory ‘must’ requirement is not met to set out the rationale for the alternative approach adopted and why this delivers a better outcome.

Section 1 - Definition of a complaint

Mandatory ‘must’ requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
1.2	A complaint must be defined as: <i>‘an expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the organisation, its own staff, or those acting on its behalf, affecting an individual resident or group of residents.’</i>	Yes	Complaints Policy doesn’t specify residents or group of residents as policy is for all Council directorates. Covered under 4.1 4.2 in Complaints Policy.
1.3	The resident does not have to use the word ‘complaint’ for it to be treated as such. A complaint that is submitted via a third party or representative must still be handled in line with the landlord’s complaints policy.	Yes	4.3 in Complaints Policy
1.6	... if further enquiries are needed to resolve the matter, or if the resident requests it, the issue must be logged as a complaint.	Yes	Stage 1 complaint process
1.7	A landlord must accept a complaint unless there is a valid reason not to do so.	Yes	Complaints Policy – section 4.2 lists examples/reasons for complaint. Action – Add wording to website that we will accept a complaint unless there is a valid reason not to.

1.8	A complaints policy must clearly set out the circumstances in which a matter will not be considered, and these circumstances should be fair and reasonable to residents.	Yes	Exceptions are listed in Annex 1 and section 5 of the Complaints Policy.
1.9	If a landlord decides not to accept a complaint, a detailed explanation must be provided to the resident setting out the reasons why the matter is not suitable for the complaints process and the right to take that decision to the Ombudsman.	Yes	We write to customers to explain so are compliant on this part. To improve our process, Action - Include wording on website immediately about right to take decision/seek advice from the HO

Best practice 'should' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
1.4	Landlords should recognise the difference between a service request , where a resident may be unhappy with a situation that they wish to have rectified, and a complaint about the service they have/have not received.	Yes	Section 5.1 and 5.2 of Complaints Policy talks about initial service requests.
1.5	Survey feedback may not necessarily need to be treated as a complaint, though, where possible, the person completing the survey should be made aware of how they can pursue their dissatisfaction as a complaint if they wish to.	No	Action – Acuity to add this as part of their surveys

Section 2 - Accessibility and awareness

Mandatory 'must' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
2.1	Landlords must make it easy for residents to complain by providing different channels through which residents can make a complaint such as in person, over the telephone, in writing, by email and digitally. While the Ombudsman recognises that it may not be feasible for a landlord to use all of the potential channels, there must be more than one route of access into the complaints system.	Yes	7.2 – 7.4 of Complaints Policy covers channels to raise complaints
2.3	Landlords must make their complaint policy available in a clear and accessible format for all residents. This will detail the number of stages involved, what will happen at each stage and the timeframes for responding.	Yes	Policy online (pdf) had accessibility check before being published. Available in different formats if requested. Action – to ensure best practice, add wording as above to website
2.4	Landlord websites, if they exist, must include information on how to raise a complaint. The complaints policy and process must be easy to find on the website.	Yes	Corporate Website complies. Action – Add link to website Housing pages to the policy
2.5	Landlords must comply with the Equality Act 2010 and may need to adapt normal policies, procedures, or processes to accommodate an individual's needs. Landlords must satisfy themselves that their policy sets out how they will respond to reasonable adjustments requests in line with the Equality Act and that complaints handlers have had appropriate training to deal with such requests.	Yes	Equality statement separately on website (linked in 3.1 of Complaints Policy) Policy references – 3.1 (bullet point 7 & 8), 6.2, 6.3, 12.2
2.6	Landlords must publicise the complaints policy and process, the Complaint Handling Code and the Housing Ombudsman Scheme in leaflets, posters, newsletters, online and as part of regular correspondence with residents.	No	Complaints Policy is on website. Work is ongoing to include details of HO scheme information in tenant newsletters, handbook, forward plan, annual reports etc. (already started with Summer 2022 newsletter) and evidence folder set up. Action – Add web link to Complaint Handling Code and self-assessment , report will be presented to TSG July 2022.

2.7	Landlords must provide residents with contact information for the Ombudsman as part of its regular correspondence with residents.	Yes	As above, work is underway and being recorded as evidence of compliance
2.8	Landlords must provide early advice to residents regarding their right to access the Housing Ombudsman Service throughout their complaint, not only when the landlord's complaints process is exhausted.	No	Action - currently only at stage 2 but need to include wording as part of stage 1 template that HO are available for advice throughout

Best practice 'should' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
2.2	Where a landlord has set up channels to communicate with its residents via social media, then it should expect to receive complaints via those channels. Policies should contain details of the steps that will be taken when a complaint is received via social media and how confidentiality and privacy will be maintained.	Yes	Policy 7.4 complies Confidentiality covered in 2.1, 2.2 in Complaints Policy.

Section 3 - Complaint handling personnel

Mandatory 'must' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
3.1	Landlords must have a person or team assigned to take responsibility for complaint handling to ensure complaints receive the necessary attention, and that these are reported to the governing body. This Code will refer to that person or team as the "complaints officer".	Yes	Council's Customer Experience Manager is current link officer to HO Customer Resolution team within Housing Performance take responsibility for all Housing complaints handling.
3.2	...the complaint handler appointed must have appropriate complaint handling skills and no conflicts of interest.	Yes	The Council's Customer Experience Manager and Housing Performance's Customer Resolution team attend regular CPD and training. Performance team engage with specific, relevant HO training. All Housing staff attended HQN complaints training and most attended customer service training Oct 2022

Best practice 'should' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
3.3	<p>Complaint handlers should:</p> <ul style="list-style-type: none"> • be able to act sensitively and fairly • be trained to handle complaints and deal with distressed and upset residents • have access to staff at all levels to facilitate quick resolution of complaints • have the authority and autonomy to act to resolve disputes quickly and fairly. 	Yes	All Housing staff attended HQN complaints training and most (those managing complaints) attended customer service training Oct 2022

Section 4 - Complaint handling principles

Mandatory 'must' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
4.1	<p>Any decision to try and resolve a concern must be taken in agreement with the resident and a landlord's audit trail/records should be able to demonstrate this. Landlords must ensure that efforts to resolve a resident's concerns do not obstruct access to the complaints procedure or result in any unreasonable delay. It is not appropriate to have extra named stages (such as 'stage 0' or 'pre-complaint stage') as this causes unnecessary confusion for residents. When a complaint is made, it must be acknowledged and logged at stage one of the complaints procedure within five days of receipt.</p>	Yes	Currently acknowledged and triaged within 2 days (Annex 2 in Complaints Policy)

4.2	<p>Within the complaint acknowledgement, landlords must set out their understanding of the complaint and the outcomes the resident is seeking.</p> <p>If any aspect of the complaint is unclear, the resident must be asked for clarification and the full definition agreed between both parties.</p>	No	<p>Unable to action due to current Council IT system which restricts characters of acknowledgement.</p> <p>Plans in place as part of LGR to change IT system for complaints – action to revisit this point Autumn 2022 and incorporate in new processes.</p> <p>We are compliant with the second part as we seek further information at triage stage.</p>
4.6	A complaint investigation must be conducted in an impartial manner.	Yes	All responses are checked by Housing Performance's Customer Resolution team. Covered by 3.1 of Complaints Policy (bullet points 2 & 6).
4.7	<p>The complaint handler must:</p> <ul style="list-style-type: none"> • deal with complaints on their merits • act independently and have an open mind • take measures to address any actual or perceived conflict of interest • consider all information and evidence carefully • keep the complaint confidential as far as possible, with information only disclosed if necessary to properly investigate the matter. 	Yes	Covered by Complaints Policy in 3.1 (bullet points 2 & 6) and 12.1 to 12.3
4.11	Landlords must adhere to any reasonable arrangements agreed with residents in terms of frequency and method of communication	Yes	All reasonable arrangements are considered and discussed with the complainant
4.12	<p>The resident, and if applicable any staff member who is the subject of the complaint, must also be given a fair chance to:</p> <ul style="list-style-type: none"> • set out their position • comment on any adverse findings before a final decision is made. 	Yes	Escalating to stage 2 provides opportunity for resident to comment before final decision is made
4.13	A landlord must include in its complaints policy its timescales for a resident to request escalation of a complaint	No	Housing currently part of wider Council's Complaint Policy, and this isn't covered. New Somerset Council policy is currently being written and for Housing, will include

			timescales for investigation as from April 2023 (currently in draft). Action – Ensure this is included in Housing addendum within new Complaints Policy.
4.14	A landlord must not unreasonably refuse to escalate a complaint through all stages of the complaints	Yes	When accepted at stage 1, complaint can proceed through full escalation process if requested or it is deemed appropriate. We don't have additional criteria to decline a complaint at stage 2.

	procedure and must have clear and valid reasons for taking that course of action. Reasons for declining to escalate a complaint must be clearly set out in a landlord's complaints policy and must be the same as the reasons for not accepting a complaint.		
4.15	A full record must be kept of the complaint, any review and the outcomes at each stage. This must include the original complaint and the date received, all correspondence with the resident, correspondence with other parties and any reports or surveys prepared.	Yes	Firmstep records complaint from cradle to grave. Customer Resolution team keep spread sheet records of all complaints. Customer data is retained in line with Council's data retention policy.
4.18	Landlords must have policies and procedures in place for managing unacceptable behaviour from residents and/or their representatives when pursuing a complaint.	Yes	Unreasonable Customer Behaviour and Vexatious Complaints Policy covers this. Complaints Policy refers 14.1 & 14.2

Best practice 'should' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
4.3	Landlords should manage residents' expectations from the outset, being clear where a desired outcome is unreasonable or unrealistic	Yes	We don't make assumptions until we have the full picture of the complaint and we have had the opportunity to investigate, but we will be clear with residents as to what we are able to do to resolve a complaint. We manage expectations through the stage 1 complaint.
4.4	A complaint should be resolved at the earliest possible opportunity, having assessed what evidence is needed to fully consider the issues, what outcome would	Yes	Policy 1.5 and 3.1 (bullet point 4, guiding principles) Action - A 'Put Things Right' process would further improve this (planned for the new

	resolve the matter for the resident and whether there are any urgent actions required.		Somerset Council Housing addendum).
4.5	Landlords should give residents the opportunity to have a representative deal with their complaint on their behalf, and to be represented or accompanied at any meeting with the landlord where this is reasonable.	Yes	Complaints Policy 6.2 to 6.4 complies
4.8	Where a key issue of a complaint relates to the parties' legal obligations landlords should clearly set out their understanding of the obligations of both parties.	Yes	This is covered in the stage 1 response

4.9	Communication with the resident should not generally identify individual members of staff or contractors.	Yes	All responses are checked by Performance team
4.10	Landlords should keep residents regularly updated about the progress of the investigation.	Yes	Performance team procedure documents reflect this. Complaints Policy provides agreed timescales (10 and 20 working days) and communication if extensions are required.
4.16	Landlords should seek feedback from residents in relation to the landlord's complaint handling as part of the drive to encourage a positive complaint and learning culture.	Yes	TSM Satisfaction Survey – every 6 months.
4.17	Landlords should recognise the impact that being complained about can have on future service delivery. Landlords should ensure that staff are supported and engaged in the complaints process, including the learning that can be gained	No	Action – Consider the guidance available from the LGO on supporting staff who have been complained about and apply this to Housing.
4.19	Any restrictions placed on a resident's contact due to unacceptable behaviour should be appropriate to their needs and should demonstrate regard for the provisions of the Equality Act 2010.	Yes	Each application of the policy is considered on a case by case basis and takes into account vulnerabilities and needs.

Section 5 - Complaint stages

Mandatory 'must' requirements Stage

1

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
5.1	Landlords must respond to the complaint <u>within 10 working days</u> of the complaint being logged. Exceptionally, landlords may provide an explanation to the resident containing a clear timeframe for when the response will be received. This should not exceed a further 10 days without good reason.	No	Complaints Policy does state 10 working days for stage 1 complaints so our policy is compliant. Policy also covers communicating new deadlines with customers (annex 2 complaints process map). 20/21 – 51%; 21/22- 68% stage 1s. Improvements are currently being worked on by the Performance team.
5.5	A complaint response must be sent to the resident when the answer to the complaint is known, not when the outstanding actions required to address the issue, are completed. Outstanding actions must still be tracked and actioned expeditiously with regular updates provided to the resident.	Yes	Policy covers (under 9.5) and this is put into practice HP team keep an 'Outstanding Actions' log and follow them through with service area

5.6	Landlords must address all points raised in the complaint and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate.	Yes	Housing Performance team gatekeep complaints to comply with this. Guidance and training (HQN) undertaken and future training planned with Council's CS team.
5.8	Landlords must confirm the following in writing to the resident at the completion of stage one in clear, plain language: <ul style="list-style-type: none"> the complaint stage the decision on the complaint the reasons for any decisions made the details of any remedy offered to put things right details of any outstanding actions details of how to escalate the matter to stage two if the resident is not satisfied with the answer 	No	Consistent at stage 2 but not consistent at stage 1. Action – Add details into response templates with immediate effect and advise complaint managers. Provide training on how to set out a complaint response.

Stage 2

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
5.9	If all or part of the complaint is not resolved to the resident's satisfaction at stage one it must be progressed to stage two of the landlord's procedure, unless an exclusion ground now applies. In instances where a landlord declines to escalate a complaint it must clearly communicate in writing its reasons for not escalating as well as the resident's right to approach the Ombudsman about its decision.	Yes	No exclusions under policy.
5.10	On receipt of the escalation request, landlords must set out their understanding of issues outstanding and the outcomes the resident is seeking. If any aspect of the complaint is unclear, the resident must be asked for clarification and the full definition agreed between both parties.	No	Action – Incorporate in new stage 2 process. Currently being considered by Senior Case Manager's project work.
5.11	Landlords must only escalate a complaint to stage two once it has completed stage one and at the request of the resident.	Yes	Complaints Policy covers

5.12	The person considering the complaint at stage two, must not be the same person that considered the complaint at stage one.	Yes	Point 1.6 and annex 2 of policy covers. Usually a more senior member of staff considers at stage 2.
5.13	Landlords must respond to the stage two complaint within 20 working days of the complaint being escalated. Exceptionally, landlords may provide an explanation to the resident containing a clear timeframe for when the response will be received. This should not exceed a further 10 days without good reason.	No	Policy does state 20 working days for stage 2 complaints. Policy covers communicating new deadlines with customers (annex 2 complaints process map). Action as per 5.2 below
5.16	Landlords must confirm the following in writing to the resident at the completion of stage two in clear, plain language: <ul style="list-style-type: none"> • the complaint stage • the complaint definition • the decision on the complaint • the reasons for any decisions made • the details of any remedy offered to put things right • details of any outstanding actions and <ul style="list-style-type: none"> • if the landlord has a third stage, details of how to escalate the matter to stage three • if this was the final stage, details of how to escalate the matter to the Housing Ombudsman Service if the resident remains dissatisfied. 	Yes	Carried out as standard at stage 2.

Stage 3

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
5.17	Two stage landlord complaint procedures are ideal. This ensures that the complaint process is not unduly long. If landlords strongly believe a third stage is necessary, they must set out their reasons for this as part of their self-assessment. A process with more than three stages is not acceptable under any circumstances.	Yes	Two stage Policy in force

5.20	Landlords must confirm the following in writing to the resident at the completion of stage three in clear, plain language: <ul style="list-style-type: none"> • the complaint stage • the complaint definition • the decision on the complaint • the reasons for any decisions made • the details of any remedy offered to put things right • details of any outstanding actions • details of how to escalate the matter to the Housing Ombudsman Service if the resident remains dissatisfied 	N/A	
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Best practice 'should' requirements

Stage 1

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
5.2	If an extension beyond 20 working days is required to enable the landlord to respond to the complaint fully, this should be agreed by both parties.	Yes	Policy accounts for this under annex 2.
5.3	Where agreement over an extension period cannot be reached, landlords should provide the Housing Ombudsman's contact details so the resident can challenge the landlord's plan for responding and/or the proposed timeliness of a landlord's response.	No	Action – Incorporate this in process
5.4	Where the problem is a recurring issue, the landlord should consider any older reports as part of the background to the complaint if this will help to resolve the issue for the resident.	Yes	Performance team gatekeeping complaints for Housing ensures historical records can be accessed
5.7	Where residents raise additional complaints during the investigation, these should be incorporated into the stage one response if they are relevant and the stage one response has not been issued. Where the stage one response has been issued, or it would unreasonably delay the response, the complaint should be logged as a new complaint.	Yes	Separate issues raised as new complaint. Related issues are added into existing complaint but also logged for stats purposes on complaint handling.

Stage 2

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
5.14	If an extension beyond 10 working days is required to enable the landlord to respond to the complaint fully, this should be agreed by both parties.	Yes	Agreed in discussions between handling manager and complainant.
5.15	Where agreement over an extension period cannot be reached, landlords should provide the Housing Ombudsman's contact details so the resident can challenge the landlord's plan for responding and/or the proposed timeliness of a landlord's response	No	Action – Include this in processes

Stage 3

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
5.18	Complaints should only go to a third stage if the resident has actively requested a third stage review of their complaint. Where a third stage is in place and has been requested, landlords must respond to the stage three complaint within 20 working days of the complaint being escalated. Additional time will only be justified if related to convening a panel. An explanation and a date for when the stage three response will be received should be provided to the resident.	N/A	No third stage
5.19	Where agreement over an extension period cannot be reached, landlords should provide the Housing Ombudsman's contact details so the resident can challenge the landlord's plan for responding and/or the proposed timeliness of a landlord's response.	N/A	

Section 6 - Putting things right

Mandatory 'must' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
6.1	Effective dispute resolution requires a process designed to resolve complaints. Where something has gone wrong a landlord must acknowledge this and set out the actions it has already taken, or intends to take, to put things right.	Yes	Housing Performance as a central complaint handling team are impartial. Policy covers remedial action (8.1, 8.2 and 9.2-9.5)
6.2	Any remedy offered must reflect the extent of any service failures and the level of detriment caused to the resident as a result. A landlord must carefully manage the expectations of residents and not promise anything that cannot be delivered or would cause unfairness to other residents.	Yes	Redress Policy complies. Complaints Policy covers remedial action (8.1, 8.2 and 9.2-9.5)
6.5	The remedy offer must clearly set out what will happen and by when, in agreement with the resident where appropriate. Any remedy proposed must be followed through to completion.	Yes	Complaints Policy covers remedial action (8.1, 8.2 and 9.2-9.5)
6.6	In awarding compensation, a landlord must consider whether any statutory payments are due, if any quantifiable losses have been incurred, the time and trouble a resident has been put to as well as any distress and inconvenience caused.	Yes	Redress Policy specifies quantifiable losses and statutory losses. Complaints Policy refers to Redress Policy (9.6,9.7)

Best practice 'should' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
6.3	Landlords should look beyond the circumstances of the individual complaint and consider whether anything needs to be 'put right' in terms of process or systems to the benefit of all residents.	Yes	Reporting and learning from complaints (13.1 – 13.6) in Complaints Policy refers. Senior Case Manager role includes project on learning from our complaints.
6.7	In some cases, a resident may have a legal entitlement to redress. The landlord should still offer a resolution where possible, obtaining legal advice as to how any offer of resolution should be worded.	Yes	Statutory payments covered in Redress Policy (section 4). Disrepair – action to find correct wording

Section 7 - Continuous learning and improvement

Mandatory 'must' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
7.2	Accountability and transparency are integral to a positive complaint handling culture. Landlords must report back on wider learning and improvements from complaints in their annual report and more frequently to their residents, staff and scrutiny panels.	Yes	Reports are provided 6 monthly and annual reports to Tenant Strategic Group, Housing Briefing and Senior Management. Regular updates in tenant and staff newsletters. 'You Said, We Did' on the website.

Best practice 'should' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
7.3	A member of the governing body should be appointed to have lead responsibility for complaints to support a positive complaint handling culture. This role will be responsible for ensuring the governing body receives regular information on complaints that provides insight to the governing body on the landlord's complaint handling performance.	No	Action – Agree and liaise with relevant member (likely to be PfH Housing) Corporate Scrutiny Committee (15 Cllrs) who have sight of complaint reports. Housing Performance team already report to Portfolio Holder on 6 monthly basis.
7.4	As a minimum, governing bodies should receive: <ul style="list-style-type: none"> Regular updates on the volume, categories and outcome of complaints, alongside complaint handling performance including compliance with the Ombudsman's orders Regular reviews of issues and trends arising from complaint handling, The annual performance report produced by the Ombudsman, where applicable Individual complaint outcomes where necessary, including where the Ombudsman made findings of severe maladministration or referrals to regulatory bodies. The implementation of management responses should be tracked to ensure they are delivered to agreed timescales. The annual self-assessment against the Complaint Handling Code for scrutiny and challenge. 	No	Compliant in that reports containing this information are provided 6 monthly to Housing Briefing (PfH) and TSG. Action – more work is needed on identifying and reviewing trends and is ongoing through Senior Case Manager's project work and wider piece of work by Council. Action – to share HO annual complaints report with TSG and Housing Briefing. Compliant in that individual Ombudsman outcomes are shared with Councillors or Members if they have been involved with the complaint. Management responses are tracked through the Performance team. The self assessment document will be provided six monthly.

7.5	Any themes or trends should be assessed by senior management to identify potential systemic issues, serious risks or policies and procedures that require revision. They should also be used to inform staff and contractor training.	Yes	Performance team Senior Case Manager currently fulfils this role through HSMT but: Action – Tighten our processes and logging of themes.
7.6	Landlords should have a standard objective in relation to complaint handling for all employees that reflects the need to: <ul style="list-style-type: none"> • have a collaborative and co-operative approach towards resolving complaints, working with colleagues across teams and departments • take collective responsibility for any shortfalls identified through complaints rather than blaming others • act within the Professional Standards for engaging with complaints as set by the Chartered Institute of Housing. 	Yes	Complaints Policy (annex 2) refers to collaboration between service areas/directorates to resolve a complaint. Housing Performance coordinate complaints where investigations cross multiple areas.

Section 8 - Self-assessment and compliance

Mandatory 'must' requirements

Code section	Code requirement	Comply: Yes/No	Evidence, commentary and any explanations
8.1	Landlords must carry out an annual self-assessment against the Code to ensure their complaint handling remains in line with its requirements.	Yes	Commitment to complete self-assessment every six months
8.2	Landlords must also carry out a self-assessment following a significant restructure and/or change in procedures.	N/A	Not required to date. One will be carried out when needed, eg LGR
8.3	Following each self-assessment, a landlord must: <ul style="list-style-type: none"> • report the outcome of their self-assessment to their governing body. In the case of local authorities, self-assessment outcomes should be reported to elected members • publish the outcome of their assessment on their website if they have one, or otherwise make accessible to residents • include the self-assessment in their annual report section on complaints handling performance 	Yes	Document presented to Portfolio Holder – see action above at 7.3 Once completed Action: Assessment to be included in 6 monthly and annual reports, newsletters, Housing Briefing 7.3

Somerset West and Taunton Council

Tenants' Strategic Group – 25th July 2022

Financial Monitoring – Outturn Position Report 2021/22

This matter is the responsibility of Executive Councillor or Francesca Smith, Portfolio Holder for Housing.

Report Author: Kerry Prisco, Management Accounting and Reporting Lead

1. Executive Summary

1. This report contains information related to Somerset West and Taunton Council's (SWT) Housing Revenue Account's (HRA) financial performance for the 2021/22 financial year. The outturn figures included are provisional subject to the completion of the external audit of the statutory financial statements. The audit is due to be completed between July and September with the findings due to be reported to the Audit and Governance Committee on 27th September this year.

2. Recommendations

The Tenants' Strategic Group is asked to note this report and are invited to ask questions.

3. Report

The challenging economic operating environment, as well as regulatory and political demands have continued to place financial pressure on the HRA during 2021/22. The service has had a backlog of responsive and planned maintenance and compliance works to deliver during the year as well as the rising costs of materials causing further financial pressure.

Covid has continued to impact business operations by causing further delays on the delivery of the capital programme, as such the Housing Senior Management Team have proposed budget returns to realign the capital programme. The reduced spend on the capital programme during the year did have a positive financial impact as this increasing investment income. The impact of Covid has increased costs in other areas of the business such as deep cleaning on sheltered accommodation and staffing requirements to maintain tenancy support.

In addition, there have been two other financial one-off adjustments this year that has helped the outturn position. The first is the successful Open Contractor project that identified major repairs undertaken as part of the voids process that could be capitalised to reduce pressure on the revenue account. The second, is that a debtors imbalance has been resolved resulting in a favourable one-off adjustment.

The unstable economic operating environment along with regulatory and political pressures means that the service is still experiencing high levels of volatility and

financial movements that are high risk. Whilst the year end position is an underspend, resulting in a small increase on general reserves which may look favourable this level may not be sufficient with the level of volatility being experienced. Therefore, the service needs to deliver ongoing efficiency savings and manage spend closely during 2022/23 to provide more financial capacity to enable the business to flex against changing and competing demands.

The **revenue outturn position** for the financial year 2021/22 is as follows:

The HRA Revenue Outturn position for 2021/22 is a net underspend of £170k (0.6% of gross income).

The HRA is a ring-fenced, self-financing account used to manage the Council's Housing Landlord function, which is budgeted to break even (net of approved transfers to/from HRA Reserves). As the HRA Net Budget is net £nil with costs wholly offset by income and reserves, performance is reported against gross income for monitoring purposes.

The **capital outturn position** for 2021/22 is as follows:

The actual spend on the HRA Capital Programme during 2021/22 was £12.708m (see **Appendix A**). The major areas of capital spend during the year related to the capital maintenance for the existing housing stock and the development of new stock.

A budget return of £11.847m is being proposed across the HRA Capital Programme. Section 10 and **Appendix A** provides more information.

A carry forward of £95.022m is being proposed for schemes in 2022/23 and future years (see **Appendix A**).

The **reserves position** for 2021/22 is as follows:

The **unearmarked reserves** are projected to be £3.413m which is £1.413m above the recommended minimum balance of £2m.

The **earmarked reserves** are projected to be £54k and are committed to support spending in future years.

4. Risk Assessment (if appropriate)

A risk assessment is not required to accompany this report.

5. Are there any Finance / Resource, Legal implications directly to do with this report?

There are financial implications as outlined above, no legal implications.

6: Are there any Equality and Diversity Implications?

There are no equality implications directly to do with this report

7. Are there any Data Protection Implications?

There are no equality implications directly to do with this report

Name of Contact Officer: Kerry Prisco

Telephone number: 001823 218758

Email address:k.prisco@somersetwestandtaunton.gov.uk

Appendix A: HRA Capital Outturn Position 2021/22

HRA Capital Programme Summary:

	Approved Budget as at 31 March 2022	Actual Capital Outturn 2021/22	Under (-) / Overspend on Completed Projects	Underspend - Budget No Longer Required	Remaining Approved Budget (ongoing projects)	Net 2022/23 Budget Additions Approved (Feb 2022)	Total Approved Budget 2022/23 and future years
	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Major Works	14,530	5,662	-0	-4,972	3,896	11,051	14,947
Fire Safety	1,756	315	0	0	1,441	2,133	3,574
Related Assets	130	31	0	-99	0	120	120
Exceptional & Extensive	294	221	0	-73	0	350	350
Vehicles	469	0	0	-404	65	155	220
ICT & Transformation	746	394	0	0	351	200	551
Aids & Adaptations & DFGs	370	158	0	-212	0	370	370
Sub-Total Majors & Improvements	18,294	6,781	-0	-5,760	5,753	14,379	20,132
Social Housing Development	101,145	5,927	138	-6,087	89,269	0	89,269
Total HRA	119,438	12,708	138	-11,847	95,022	14,379	109,401

Note: The approved budget for future years includes all Social Housing Development schemes approved for their duration plus one year of major works and improvements.

Appendix A: HRA Capital Outturn Position 2021/22 (cont.)

HRA Capital Programme Detail Listing:

Scheme Name	Approved Budget as at 31 March 2022	Actual Capital Outturn 2021/22	Under (-) / Overspend on Completed Projects	Underspend - Budget No Longer Required	Remaining Approved Budget (ongoing projects)	Net 2022/23 Budget Additions Approved (Feb 2022)	Total Approved Budget 2022/23 and future years
	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Major Works	14,530	5,662	-	-4,972	3,896	11,051	14,947
HRA C Major Repairs Capital Programme	-	-	-	-	-	-	-
HRA C Major Repairs & Improvements	5,821	182	-1,669	-3,971	-	150	150
HRA C Kitchens	2,095	323	-	-	1,772	1,922	3,694
HRA C Bathrooms	1,020	114	-	-	906	507	1,413
HRA C Roofing	432	213	-	-	219	2,500	2,719
HRA C Windows	640	1,568	928	-	-	1,211	1,211
HRA C Heating Improvements	878	648	-	-	230	1,348	1,578
HRA C Doors	100	128	28	-	-	703	703
HRA C Fascias and Soffits	309	694	385	-	-	192	192
HRA C Air Source Heat Pumps	1,037	722	-	-315	-	-	-
HRA C Door Entry Systems	400	97	-	-	303	57	360
HRA C Community Alarms	-	-	-	-	-	10	10
HRA C Insulation	495	71	-	-424	-	300	300
HRA C Ventilation	40	15	-	-25	-	276	276
HRA C Kitchen rep'd due to dam (voids)	243	443	200	-	-	95	95
HRA C Bathroom rep'd due to da (voids)	86	213	127	-	-	95	95
HRA C Underground Drainage	50	9	-	-41	-	100	100
HRA C Environmental Improvements	100	46	-	-54	-	420	420
HRA C Electrical Testing	466	168	-	-	297	670	967
HRA C Sewerage Treatment Plant	50	-	-	-	50	100	150
HRA C Unadopted Areas	50	0	-	-	50	150	200
HRA C Scaffolding	50	7	-	-43	-	30	30
HRA C Water - Planned Maintenance	100	-	-	-100	-	215	215
HRA C Water - Safety Compliance	69	-	-	-	69	-	69
Fire Safety	1,756	315	-	-	1,441	2,133	3,574
HRA C Fire Safety Works	1,756	315	-	-	1,441	2,133	3,574
Related Assets	130	31	-	-99	-	120	120
HRA C Meeting Halls	35	0	-	-35	-	60	60
HRA C Garages	95	31	-	-64	-	60	60
Exceptional & Extensive	294	221	-	-73	-	350	350
HRA C Asbestos Works	294	221	-	-73	-	350	350
Vehicles	469	-	-	-404	65	155	220
HRA C Building Services Vehicles	469	-	-	-404	65	155	220
ICT & Transformation	746	394	-	-	351	200	551
HRA C IT Development	746	394	-	-	351	-	351
HRA C Transformation	-	-	-	-	-	200	200
Aids & Adaptations & DFGs	370	158	-	-212	-	370	370
HRA C Aids and Adaptations	70	36	-	-34	-	70	70
HRA C DFGs	300	122	-	-178	-	300	300
Sub-Total Majors & Improvements	18,294	6,781	-0	-5,760	5,753	14,379	20,132
Sub-Total Social Housing Development Programme	101,145	5,927	138	-6,087	89,269	-	89,269

Note: The Social Housing Development Programme has not been provided per scheme as some of the detailed content is confidential whilst contracts are still being negotiated.

Somerset West and Taunton Council

Tenants' Strategic Group – 25th July 2022

Directorate Report

This matter is the responsibility of Executive Councillor Member for Housing.

Report Authors: Assistant Directors and Housing Performance Manager

1. Executive Summary / Purpose of the Report

The report is to update the Tenants' Strategic Group on work being undertaken and progress made by the Housing Directorate since the last TSG meeting in September 2021.

2. Recommendations

The Tenants' Strategic Group is asked to note this report and are invited to ask questions.

3. Background and Full details of the Report

Housing Development and Regeneration Team

HRA New Homes, Housing Strategy and Housing Enabling

- North Taunton Woolaway Project (NTWP) Phase A is progressing with the first couple of completions due in Summer followed by small numbers of units later in the year. Equans/Engie continue to work well on site. Phase B is now vacant, and progress is being made steadily on phase Ci although mutual terms are not currently agreed on one private landlord property. Due to inflation and the challenges facing developers the Council is market testing phases B and Ci and will lead the demolition of these phases. Phase E has

received planning permission approved and the specification is going out to tender.

- The 54 home zero-carbon development at Seaward Way, Minehead, commenced in January. The zero-carbon exemplar scheme which has been featured as a case study in the Good Homes Alliance good practice guide will be complete by October 2024.
- The service has six planning applications for the zero-carbon affordable housing awaiting presentation to planning committee. We believe the service has an appropriate phosphate mitigation strategy and the applications will be heard at the August committee. The service hope to create excess phosphate credits as the housing service has three different approaches to mitigate against phosphate. The approaches could support circa 1000 new social and private homes which are currently unable to receive planning permission.
- The service is progressing at pace a low carbon retrofit strategy and delivery plan. A new tenants retrofit group will meet from July to consider and influence the strategy and delivery plan. The strategy will be considered by the Council in December 2022. SWT has been awarded SHDF (Social Housing Decarbonisation Fund) Wave 1 funding to support a low carbon retrofit of council homes. The three pillars of the emerging strategy are engaging and supporting our customers, fabric first and then, over time, replacing fossil fuels with renewable heat and power provided via onsite, communal, or grid-based systems. The relationship between fuel poverty and low carbon retrofit will be explicitly considered within the strategy.
- New affordable housing in the district has seen a higher-than-average number of properties completed this financial year. The pipeline of new units is currently at its strongest in the west of the district, which is unaffected by the phosphate mitigation planning requirements.
- The Single Homeless and Rough Sleeper Accommodation Strategy and delivery plan was approved by Full Council in October and Officers are supporting the delivery of new homeless bedspaces through several partners and direct council supply. The council has been awarded £750k through the government Rough Sleepers Accommodation Programme to accelerate the new provision Round three and a further £80k in Round 4.
- The Housing Enabling team are preparing the district for the impact of First Homes which is a government initiative to increase low-cost home ownership.
- We continue to deliver the Hinkley Point C Housing Programme, working with partners to drive forward 11 key areas of work. This programme is providing new bed space in the district and support to vulnerable customers affected by the change in the housing market because of the uplift of workforce at HPC. The service has submitted a request to ERDF for a further wave of funding (£390k) to continue many projects up to December 2023.

Housing Property Team

Responsive Repairs and Void Repairs

- Emergency and non-emergency responsive repairs are being undertaken.
- Emergency jobs are being delivered within our defined timescale (24 hours from logging).
- The backlog of non-emergency responsive repairs has now been eliminated, following the use of external contractors. MD Group are providing ongoing support to a small proportion of repairs where required to cover internal staff resource shortfalls.
- Undertaking void repairs to meet our Lettable Standard remains a challenge, although performance continues to improve in this area. Again, we are working with MD Group to support on undertaking some of our Major Voids (those with two or more key elements required).
- We are undertaking a recruitment process for a Maintenance Manager, following the previous postholder leaving SWT.

Property Safety Compliance

- All property safety compliance checks and works continue to be undertaken. These include gas safety checks (LGSR's), water risk assessments and remedial works, electrical inspections (EICR's), asbestos surveys and re-inspections, fire risk assessment and remedial works, fire safety checks, and lift and stair-lift checks and remedial works.
- An accelerated programme, using further additional contractors, to undertake outstanding electrical inspections (EICR's) and associated remedial works continues.
- Weekly compliance and additional review meetings are being held to carefully monitor and manage all these safety critical areas.

Capital Programmes

- Several capital work programmes are on-site, including kitchen and bathroom replacements and fire safety works (replacement fire doors and emergency lighting). Progress on these programmes is slower than desired however, and we are working with the relevant contractors to seek improvements on output.

- Procurement activities also continue, including review of required capital programme works needed to meet the Decent Homes Standard (DHS), as well as our Retrofit aspiration.
- A new Interim Capital Programme Manager has been recruited.

Asset Management

- Following go-live of the Open Assets module of our Capita software system, post go-live work is now underway, although some of this is dependent upon the Open Housing implementation to go-live. This has unfortunately been further delayed.
- Accelerated programmes of Stock Condition Surveys and Energy Assessments continue to take place.
- Capital work programme planning (for both the 2022/23 financial year and forward plans) is being undertaken, including for both DHS and Retrofit.

Housing and Communities Team

Supported Housing (extra care and sheltered)

Unfortunately, the service has continued to be run with a much-reduced staff capacity, due to extended staff sickness and absence. Some staff are also returning to work on significantly reduced hours. The staff who are in work are working extremely hard to covering work within their patch and across other colleague's patches too. The Manager is hoping to recruit a temporary member of staff, to enable the team to 'catch up,' with the annual reviews.

The team has continued to;

- Sign-up new tenants and support tenants and their families (where there has been a death) through the 'leaving well' process;
- Keeping the DHL (Deane Helpline) daily rota covered and responded to;
- Install Pipelines, for new tenants and arrange replacements, for existing tenants;
- Responding to the enquiries coming through Firmstep;
- Completing estates checks, where possible;
- Dealing with lower level ASB;

- Referring tenants to specialist support when needed;
- Complete aids and adaptations assessments and order to support tenant's independence within their home;
- Present cases for direct match, for tenants no longer able to manage a home with stairs, as part of the PEEP evacuation work being undertaken in partnership with the Compliance Team, including re-housing within extra care schemes for tenants with a current/future care need;
- Attend initial Open Housing training;
- Arrange for clearance of properties, following a death and where there is no NoK, including issuing required legal notices;
- Working with Solicitors on a possible eviction and ensuring alternate services are involved to step in and provide a suitable accommodation offer;
- Supporting a Housing 1st tenant, being housed within a sheltered housing scheme;
- Responding to formal tenant complaints

Lettings

- Total new lets from 1st April 2022 to date is 54. Of which 27 were Minor Voids with an average Keys to completion 32 days. 27 Major voids had an average works duration of 56.4 days the combined average works duration 44.2
- Satisfaction surveys are now being sent out via email. Uptake has not been high at this stage- Although there had been an issue with the technology which has now been overcome.
- Open Housing Management System work continues. Lettings team have been both testing and training on the Open system.
- Lettable standard is now live on the SWT website. TAG is now working with Voids/lettings on the Voids Group. The group will view returned SWT properties as they are when returned to SWT at the commencement of the void period. The same property will then be revisited at the conclusion of the void period and signed off having been marked against the lettable standard by the Voids group.

Income Team:

- Recruitment to 2 full time vacant posts within the team is underway. Michaela Mullen is the team manager leading on this task;
- Increased focus is being given to training users on our new IT housing management system prior to its launch towards the end of July 2022. The system holds all our tenant rent account details and is run by the officers who manage tenant rent accounts.
- Officers within the team are having a lot more in-depth contact and conversations with tenants about paying their rent, especially where there is financial hardship. The team are working hard to maintain and sustain tenancies, rather than terminate them and eviction is used as a last resort.

Tenancy/Estates & ASB

- The teams are continuing to remain stable and settled.
- Skip days are now ongoing and although we experienced initial problems with the skip provider which have now been resolved. Our communities are utilising and making good use of the skips.
- Complaints and general enquiries (Firmstep) are being managed well. We are noticing that the number of low-level neighbour nuisance is on the rise. This is both time consuming and complex as the team are dealing with allegations and counter allegations; and work to ensure that the tenants' expectations in what we can do are managed correctly.
- Youth gang culture is still ongoing and having an impact on our estates. We continue to work with partners to try to tackle these issues. We will also ensure that all families involved where they are tenants have been visited and that words of advice/warnings are given; where necessary Acceptable Behaviour Contracts are agreed and signed by both parents and youths where needed.

Housing Performance Team Housing Performance Team (Shari Hallett)

- We continue to support the work of the Tenants Strategic Group and Tenants' Action Group. On the 23rd August 2022 we are also planning to hold our second joint tenant meeting with Homes in Sedgemoor, specifically to engage tenants on LGR.
- The damp and mould group for tenants continues to meet and has agreed a set of actions.
- A new Low Carbon Working group for tenants has their first meeting in July.
- The tenants' summer newsletter has been posted to Tenants.
- We are collectively working with Homes in Sedgemoor on local government reorganisation workstreams.
- The policy review work with the HQN (Housing Quality Network) continues and TSG members will receive revised policy documents.
- Our headline Tenant Satisfaction Survey results (completed in May 2022) have been received. Unfortunately, we have seen a downward trend which is consistent with the current trend for the social housing sector. Some results mirror our lessons learnt from complaints analysis. A full report will follow in September's meeting.
 - Overall satisfaction 76%
 - Satisfaction of being treated fairly and with respect 82%
 - Satisfaction with the neighbourhood as a place to live 80%
 - Satisfaction that the home is well maintained and safe 79%
 - Satisfaction with knowing how to complain 79%
 - Satisfaction with being kept Informed 78%
 - Satisfaction that landlord listens and acts 62%
 - Satisfaction with complaint handling 61%
 - Satisfaction with grounds maintenance 57%
 - satisfaction with communal areas 55%

4. **Risk Assessment (if appropriate)**

A risk assessment is not required to accompany this report.

5. **Are there any Finance / Resource, Legal implications directly to do with this report?**

There are no financial implications directly to do with the recommendations in this report

6: **Are there any Equality and Diversity Implications?**

There are no equality implications directly to do with this report

7. **Are there any Data Protection Implications?**

There are no equality implications directly to do with this report

Name of Contact Officers: Shari Hallett

Telephone number: 07557 003944

Email address: s.hallett@somersetwestandtaunton.gov.uk

