

**Plus Dane Scrutiny Panel
Report and Recommendations on
Plus Dane's Sign Up Process**

1. Role of the Scrutiny Panel

We are a Scrutiny Panel of Plus Dane customers who are an established part of Plus Dane's Governance framework. Comprised of 10 tenants and supported by the Engagement Team, our role is to review and make recommendations on different areas of the service that need to be examined because of issues around performance, cost or customer experience. In line with co-regulation, we believe that this customer perspective we bring to scrutiny will help provide the organisation with a balanced view of how it may want to approach the issues it faces around improving services and maximising best use of resources. We want to work closely with the business to help it provide the best and most sustainable services to tenants and the neighbourhoods it serves.

We understand and embrace Plus Dane's Engagement Strategy which puts tenants at the heart of all Plus Dane's business. With this in mind, we have reviewed the sign up process and made recommendations that hopefully reflect the ethos of the that strategy.

The following details our findings and recommendations from our first 'pilot' scrutiny on the very specific topic of the Plus Dane **sign up process**.

2. Why look at the sign up?

The sign up process was selected for the following reasons:

- It is the first point where the new tenant meets Plus Dane face to face in a formal setting, and so has the potential to influence their perception of Plus Dane and their tenancy.
- It is an opportunity to provide the tenant with information about their new Plus Dane home, landlord and neighbourhood, as well as sign post them to services which may help them throughout their tenancy.
- There was a perception that the current sign up process is excessively time consuming for staff and tenants, involving a lot of paperwork and that it could possibly be streamlined to improve the experience for both the tenant and Plus Dane.
- It was thought a suitable topic for the pilot review, as it was considered a self-contained service.
- Plus Dane had apparently looked at other parts of the lettings process as part of their neighbourhoods review but not specifically the sign up.

3. Scope for the scrutiny review

The scrutiny review looked specifically at the sign up process in general needs housing, focusing on the meeting between officer and tenants where the tenant signs the tenancy agreement, satisfies all financial criteria and is given the key to their new home. We acknowledge that this is only part of the broader lettings process, however as part of our review we also considered the information provided before and after the actual sign up interview.

Our aim was to review the current sign up process to see if it was fit for purpose by looking at;

- The effectiveness and efficiency of the sign-up process in terms of the tenant experience.
- The resources it incurs and the time it takes.
- The effectiveness of the sign up process in terms of its identification of any support needs the tenant may have.
- The effectiveness of the sign-up process in helping the tenant to settle into their home and neighbourhood.

The scope of the review did not include the sign up process for Leaseholders and Shared Owners.

4. What we did

To make the process simple we commissioned Plus Dane staff to collect information, organise consultation, prepare reports on our behalf as this gave us time to evaluate the data and select which tasks we wanted to do ourselves.

In addition to support from staff we also received ongoing guidance and advice from our specialist tenant's advisor.

The methodology we used was:

- Briefings and presentations from staff explaining the scrutiny review and the sign up process using information, role play, performance data and feedback was provided by staff currently involved with the sign up process.
- A review of the existing information held by Plus Dane on the sign up process

This included;

- Tenant satisfaction feedback on the letting service as a whole
- Lettings performance information
- Paperwork associated with the sign up
- Policy and Procedure documents
- Broad staff feedback on the lettings process as a whole.

Whilst the existing organisational information was useful, there was a lack of specific information on the sign up process itself in terms of tenant and staff feedback, therefore we commissioned the following to gather additional information;

- A 'Snap Survey' telephone/postal survey of tenants who had signed up to a new home in the last 12 months
- Observation of sign-ups in Merseyside and Cheshire
- A focus group held with lettings officers and other relevant staff involved in the process
- Further review of benchmarking and good practice

The materials and surveys mentioned in this section can be found in the attached appendix.

5. What we found during our scrutiny

Fit for purpose

On the whole, we found that the current sign up process worked, in that it facilitated the signing of documents, confirming all financial arrangements and when completed, handing over the keys.

We found the sign up process to be effective while recognising that this is not always an easy task. We were also aware of the balance that needs to be struck between signing up tenants quickly to reduce void rent loss or tenant hardship and the need for the tenant to feel comfortable through this process and having enough time to move into their new home in reasonable comfort.

Existing organisational information

We found that the existing performance data did not produce any information specific to the sign up process beyond the fact there were no specific complaints about it. This meant it was very difficult to track performance through historical data.

However, following a review of the documentation, we found that there was a significant amount of paperwork to go through at each sign up. The sign up documents and new tenant pack have evolved over time, with additional items being added ad hoc. This has led to inconsistencies, poor design, ineffective branding and an uninspiring first impression of the organisation.

In terms of the policy documents and process guidelines, there was no real emphasis on the provision of neighbourhood information on tenancy sustainability.

In terms of benchmarking there was generally little information collected on tenant's sign up across the sector, so simple comparison with other providers would be a more effective way to get an idea of best practice. We did consider some comparative good practice from Orbit Housing for example, where they have adopted a fully automated digital lettings process.

Tenant survey findings

Using Plus Dane Voices and neighbourhood information, 77 Snap Surveys were completed from tenants who had moved into their homes in the last 12 months. Staff made 173 phone calls and sent 154 emails in support of this work.

Overall the sign up process gets a clean bill of health from those tenants surveyed, with 85% rating it good to excellent. Tenants seemed to expect a lot of paperwork and did not seem to want to do much in preparation for the sign up. The survey showed the amount of information supplied at the sign up was acceptable and that the process was reasonable.

Overall, in terms of customer experience the survey found officers polite and professional; those surveyed also indicated they were not too concerned with the choice of sign up venue.

Tenants noted that they were not provided with very much information on their new home or neighbourhood. They mainly wanted to be informed about instructions for appliances/utilities and where to locate them.

Sign up observations findings

Observations at sign up provided an extra dimension to the analysis of the tenant surveys. We observed that the sign up interview was sometimes rushed and completed under varying levels of stress and because of the amount of paperwork to get thorough did not provide a good environment for asking questions. We felt that the volume of documentation sometimes made it difficult for the tenant to grasp all the information that was available. This was also a perception shared by staff. We also found the interview room at the Cheshire office to be unwelcoming and unsuitable.

We observed that tenants requested basic information on information relating to their new home and neighbourhood. Tenants mainly wanted information relating to appliances and utilities, where they were and how to use them. The team were not always familiar with the home and the information was not always readily available.

We observed that the sign-up process is quite formal and functional and we feel that there was little by way of an introduction to Plus Dane and a welcome to their new home. It appeared that the sign up was the same for each tenant and some opportunities to personalise the Plus Dane offer were missed.

The customer experience was not very positive in this respect, but as the tenants were not aware of the alternatives they did not know they were entitled to a better experience. Observation here proved invaluable in terms of more objectively assessing the experience and noting that there were some issues that did need to be addressed.

We did not observe any real service signposting in the sign ups but it was difficult to draw any firm conclusions from this given the relatively low number of observations – nine in total.

Staff focus group observations

We learnt from staff that there is some core information and tasks staff must do/tell tenants at sign up. Staff felt non-essential information could be supplied at another time in the process or by another means, digitally etc.

Administratively there was a lot of duplication preparing and completing numerous forms and this was very time consuming.

Conversations about the property and the neighbourhood take place at the property viewing stage. There was potential to give tenants additional information here and to record the information they had been given, particularly in respect of the property.

Previous tenant feedback highlighted that at the viewing, promises were made re property condition and repairs that needed to be carried out. This was not consistently checked at the sign up.

There was a delay in recording new tenant details on the housing management system, which meant that the Lettings Team and Customer Access Team did not always have tenant's information to hand when needed.

Staff did not tend to discuss neighbourhood information but did have sign up sheets with useful contact numbers in the tenants document pack.

It was not always clear how much signposting took place before or during the sign up based on the information given in the lettings process.

It was acknowledged by staff and throughout the observations that there was not much time to ask tenants about their specific needs in the sign up. So if these were not identified prior to the sign up they could be missed. It was also unclear how the housing officer picks up some of these issues after the sign up. We believe that signposting tenants with support needs plays a vital part in influencing tenancy sustainability and therefore reducing property turnover.

It was evident that processes could/should be more streamlined and, as and when available, supported by effective IT systems. Streamlining would facilitate more productive processing of lettings and applications whilst a pared down process could make more time available for getting to know the product, tenants and ensuring that they are fully informed and signposted to relevant services.

Improved IT would offer added mobility to staff conducting sign-ups away from the office easier. This could significantly improve the experience for some tenants particularly those in areas with poor public transport, with specific needs, limited time, family/carer responsibilities or mobility issues. Such technology could also resolve issues around inventories, property condition and any agreed maintenance or repairs.

Finally, we found that the information at sign-up for existing tenants who are transferring does not need to be as extensive as for first time tenants. Efficiencies can be found here by developing a fast-track option for existing tenants.

6. So what did the analysis tell us?

The headlines showed that;

- The current sign up process works but there are improvements that can be made to improve efficiency and the customer experience.

- The process meets tenant's current expectations and tenants are happy for the sign up to be completed in one go. This also enables the organisation to get everything completed at one meeting.

However:

- The sign up is paper heavy, provides too much information and does not allow enough time for questions. Rationalising the documents and reducing the time to fill forms could enhance the experience for tenants and staff.
- More explanatory information could be made available online for tenants to view at their convenience. However, we need to be careful that by moving to a more online service does not slow down the process.
- Administrative duplication as part of the process also needs to be addressed possibly through more integrated IT. The time saved here would demonstrably benefit the business.
- There are a number of opportunities in the process for the tenant to be given specific and good quality property information.
- It is important from a customer care point of view that tenants are given clear information and assurances about what and when agreed works will be completed.
- There is limited neighbourhood information provided but it is not clear if there is a tenant appetite for this signposting beyond useful information about services and utilities.
- Signposting to additional and support services could be an important factor in determining how long tenants stay in their home and ongoing brand loyalty. Plus Dane has a sophisticated network of its own services as well as good links to other providers. Given this, it is important that the opportunity for signposting is maximised at sign up.
- The importance of the sign up as an opportunity for the organisation to formally welcome new tenants and set the standard in terms of the new relationship and its 'brand' emerged as a major theme in the review. Improved materials, consistent branding /design and some work around particular messages such as tenant promises, what you can expect from Plus Dane etc. need to be considered. This is a good opportunity for Plus Dane to introduce itself to new tenants and establish its ethos and quality service to them.
- Having a bigger and more deliberate brand message at the start of the process is something that the tenant experience could be very much built around.

7. Recommendations

This report makes a number of recommendations under the following headline areas based on the detailed analysis and observations we carried out which we hope will tackle the issues that we identified with the sign-up process

1. **Improving advance information and streamlining the process for tenants**– recommendations (1.1 – 1.7) are to help tenants get more out of the

time they spend in the sign-up meeting. We want the tenant to know more about what to expect so that they can have their own questions ready and for there to be link between the viewing and sign-up so that discussions and questions for example about outstanding repairs and decoration allowances get resolved consistently.

2. **The Plus Dane welcome and establishing the customer relationship** – recommendations (2.1 – 2.5) are to ensure that the tenant feels valued and that Plus Dane see's the sign-up as a key part in developing its relationship with tenants. We want Plus Dane to know who the tenant is, their circumstances and specific needs in advance of the sign-up. We want the tenant to feel confident that they don't have to repeat themselves and for Plus Dane to prepare in advance. We want to see that there is continuity of contact, so that tenants see the same officer throughout the process of becoming a tenant and for there to be a seamless handover with the relevant housing officer.

We want tenants to leave the sign-up with well organised essential information collated into a Plus Dane branded pack that gives them a clear and positive picture of their new landlord.

3. **Improving internal administration and preparation for the sign-up interview** – recommendations (3.1 – 3.5) are suggested to change the focus of the sign-up from one where the officer and tenant are going through administration to one where there is more discussion and an opportunity to ask questions.
4. **Information to help the tenant know more about their home and neighbourhood** – recommendations (4.1 – 4.4) are suggested to ensure tenants have basic information about where equipment is located in their new home and they know how to use it, and that they have useful information about their neighbourhood to help them settle in.
5. **Signposting to services to help improve tenants quality of life and successfully maintain their tenancy** – recommendations (5.1 -5.5) are aimed at making sure that tenants know about the additional services that Plus Dane offer that may be useful to them and how they can access them.
6. **Performance information** – recommendations (6.1 -6.4) are aimed at ensuring that Plus Dane consistently collect performance information on the sign-up process. We have made some suggestions about what could usefully be monitored, focusing on ensuring consistency so that all tenants receive the same standard and flexibility of service.
7. **Digitalisation of services** – recommendations (7.1 – 7.5) suggest where the service can be improved by increasing digitalisation.

As the pilot study progressed, it became apparent that the sign-up process is a culmination of a multi-stage process incorporating a pre sign-up interview, a viewing, and the sign-up interview itself. Owing to the scope of our pilot review, we focused on the sign up but have inevitably included recommendations for the earlier stages as we recognise that for the new tenant experience to be successful the same joined up approach needs to be considered across the board.

It is acknowledged that some of the issues identified will be improved upon by projects and thinking already undertaken by the team, the digital project being an example. However, there are improvements that can be made in the interim and in parallel. The final section looks forward to the improvements that we think could be incorporated into future plans.

It should be noted that, although we have made some specific suggestions we acknowledge that we are not the experts and welcome alternative suggestions from the staff.

Recommendations	Where from?	Benefits?		Director's Response	Action
		Cust.	P D		
<p>1.1 The letter/email/ text inviting tenant to the sign up meeting should advise of the main areas that will be covered i.e. sign Tenancy Agreement, receive keys, arrange for appointment for gas test, etc.</p> <p>It should also highlight what the applicant needs to prepare in advance of the meeting i.e. apply for; housing benefit , pay the first week's rent, what they need to bring with them, the likely length of the sign-up.</p> <p>This letter could be given and discussed in advance.</p>	Panel discussion based on study of paperwork and staff focus group	✓	✓	We agree this will benefit the customer and the organisation, giving time to prepare and be prepared	We will introduce a standard information sheet that provides key information. This will be included with the invite in the relevant format and also displayed on Plus Dane Website
<p>1.2 Send out information in advance for tenants to look at prior to the sign-up, including a sample Tenancy Agreement with key areas highlighted. There should also be a review of the lettings procedure to ensure consistency of service, as the procedure already includes this but it does not always happen.</p>	Observation of sign up, study of documents, staff focus group and staff briefing.		✓	A review of the lettings process is incorporated into our neighbourhood plan and will include monitoring of this as we recognise there have been inconsistencies/i nefficiencies with this process	Review of procedures has commenced and a summary of key information/tenancy agreement will be shared in advance, together with a full sample agreement placed on the website
1.3 Matters discussed at viewing should	Study of	✓		Agree a record	Amend viewing sheet

Recommendations	Where from?	Benefits?		Director's Response	Action
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be documented including works identified (stating whether they are to be completed before, or after tenants move in) possibly with photos. This should then be checked off at the sign up meeting.	documents, lack of property info and customer survey			should be maintained of matters discussed at viewing, including works identified	to capture matters discussed and facility to sign off with customer at sign up. The customer will retain a copy to ensure actions are delivered as agreed.
<p>1.4 Ensure consistency of messages by producing a standard checklist for staff to use at sign up covering disability, family support, employment, income, previous tenancies or other support provided by other staff or organisations.</p> <p>Look at the possibility of producing a standard meet and greet script for lettings officers.</p>	<p>Study of existing paperwork. Staff focus group. Survey found process disjointed/ rushed</p> <p>Obs. & study of docs & policies: lack of Plus Dane identity or messages</p>	✓		<p>The recent re-structure has aligned the sign up process and all functions are now carried out by one team. We will review this as part of the review of the lettings process, this will also include standard checklist and any additional tasks that are undertaken where there may be local variances</p>	<p>Review and amend checklist to ensure consistency and include any local variances</p> <p>Include in procedure guide- the checklist should reflect the process to ensure new officers are fully trained and provide consistency in service</p>
1.5 Choice of location for sign up offered to tenants who live in places	Tenant survey and	✓		The pre-allocation	Question added to satisfaction survey

Recommendations	Where from?	Benefits?		Director's Response	Action
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where public transport to the office is problematic, or who have a disability or request it for other reasons.	initial staff briefing to Panel both mentioned this			assessment identifies customers who are likely to need alternate location for sign-up and offers alternatives where available	regarding satisfaction with sign up.
1.6 Where a sign up takes place at short notice, ensure tenants still have access to all relevant material in a swift follow-up even though the advance communications and planning may have been rushed.	Observation of sign-ups	✓	✓	We agree all customers should have access to the same information regardless of speed of sign-up	Action 1.1 & 1.2 will ensure all customers have access to the same information prior to sign up (digital or paper)
1.7 For a review to take place of the lettings process from end to end to ensure that it is seamless and to avoid processes being delivered in silos. PD to consider how to embed customer voice and scrutiny into this review.	Panel / PD	✓	✓	A full review of the lettings process is part of our neighbourhood plan for 2017/2018	Will engage with PD voices to ensure we have captured their views and feedback as part of the process Scrutiny will receive progress reports on actions, and will be invited to offer a representative for the review.
2.1 The officer conducting the sign-up	Observation	✓		Since April 2017,	We will reinforce this

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should be prepared in terms of knowledge of the customer e.g. knowing tenants name, household details, and vulnerabilities in advance of the sign up.	& lack of staff knowledge of specific tenants			the sign-up is now the responsibility of one team instead of various teams, which will ensure improved knowledge & consistency	feedback via staff training and monitor via customer satisfaction with the lettings service.
2.2 The officer carrying out the sign-up, pre-sign up and viewing should, wherever possible, be the same person.	Observation of sign-ups	✓		Agreed, although it may not be possible in every case due to leave, workloads etc. but it is the aim wherever possible. The new structure will facilitate this.	N/A as every lettings officer now has a patch for consistency and an assistant buddy, which should deliver this action.
2.3 Tenants should be given name and contact details for their housing officer at sign-up. <i>(links with 4.3)</i>	Observation of sign-ups	✓		The re-structure has introduced a 'triage service' contact is encouraged through the Customer Access Team to	N/A

Recommendations	Where from?	Benefits?		Director's Response	Action
		Cust.	P D		
				enable us to allow a response first time, if this is not possible, the call will be transferred to the housing advisors, if at that point we are unable to resolve there will be a named officer/appointment made for the customer dependant on the query	
2.4 Use the sign up to promote Plus Dane's brand as a landlord of choice. Improve Plus Dane branding at the sign up, for example by putting keys on a Plus Dane branded keyring with contact centre phone number. <i>(links with 3.2)</i>	Observation: lack of contact information/branding	✓		We will look for opportunities to promote Plus Dane branding across our services	Work with communications team and identify and agree ways of improving branding at sign up and promoting Plus Dane as a landlord of choice, to include promotional material for customers, posters / information on website and in offices, all literature to include Plus Dane

Recommendations	Where from?	Benefits?		Director's Response	Action
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					brand.
2.5 Consider using an alternative interview room in Cheshire to conduct the sign-up's, preferably one with windows.	Observation of sign-ups	✓	✓	Plus Dane are reviewing their accommodation strategy that will take this into consideration. In the interim we will work with staff to ensure customers have the best experience at sign up	Review rooms available for use Set up calendar for rooms Review furniture to ensure fit for purpose as part of accommodation strategy Raise awareness with staff
3.1 The signup should give the new tenant a clear picture of Plus Dane as an efficient organisation, and should link the customer to the wider organisational services.	Observation of sign-ups	✓		We are reviewing processes to maximise efficiency	Process review is underway. As at 2.4, we will promote the wider organisational services
3.2 Review sign up pack and rationalise. Take out any documents that are not needed. Rationalise all sign-up checklists and ensure consistency across teams.	Staff focus group - use of separate checklists Survey - amount of	✓	✓	The sign-up pack will be reviewed with a view to streamline the amount of	Undertake a review of the sign up paperwork

Recommendations	Where from?	Benefits?		Director's Response	Action
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	paperwork			paperwork and ensure it is relevant	
<p>3.3 Review forms tenant has to sign; consider what could be combined into one Plus Dane branded folder, This would promote Plus Dane as a landlord and establish its identity throughout the sign up process.</p> <p>Information needing to be transferred between different forms should be anticipated and completed before sign up.</p>	Observations and staff focus group	✓	✓	We will review this as part of the sign-up pack review, rationalise the paperwork and long-term anticipate some efficiencies can be made with the introduction of IT enabled processes	Review forms and reduce or amalgamate any duplication Including (not an exhaustive list) tenancy agreement/emergency contact form/sign up checklist (Linked to 3.2)
3.4 Rationalise process for internal transfers by minimising checks and standard process.	Staff focus group	✓	✓	Existing customers should not need to follow the same process/information gathering as new customers and we will review this process	Review transfer process
3.5 Review how to speed up housing benefit claim process in sign-up; by completing more of the form in	Observation of sign up; staff focus	✓	✓	Housing benefit claims are governed by	All customers are expected to complete online claims from

Recommendations	Where from?	Benefits?		Director's Response	Action
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advance for tenants based on info they provide at pre-let interview.	group. Customer survey highlighted some support needed for tenants.			DWP, we work across different Local Authorities that operated very differently. Since the review there has been a change in the benefit claim process. There are no longer any forms, it is all on-line for both authorities since 16/6/17	16/6/17, however we will assist vulnerable tenants where needed
4.1 Give all tenants information on how to use their appliances, for example heating and boilers not just those tenants moving into new build homes.	Sign up observation and staff focus group noted this only happened at new build	✓	✓	We recognise the benefits of providing information to customers, allows them to be self-reliant, avoids unnecessary contact and this is included in our local improvement plan. Information will	Produce guides for appliances Source promotional information e.g. bleed radiators

Recommendations	Where from?	Benefits?		Director's Response	Action
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				be published using various media	
4.2 Ensure tenants have access to neighbourhood information. (<i>Links to 4.3</i>). After implementation of digital services, the lettings officer should show an appropriate local services web site to the tenant at the viewing, or at the sign-up, and include the web link in the written information given to them.	Study of documents and lack of neighbourhood info	✓		We won't duplicate existing information, but will seek to identify and signpost to existing useful local information.	We will identify links to local services to include in the information for new tenants
4.3. Information sheets on "added value" services should be combined into a small PD branded leaflet (eg United Utilities example) with links to relevant websites; This could include information on:- <ul style="list-style-type: none"> • Plus Dane Voices • Contents insurance • Signposting information on other / support services provided by Plus Dane, and by other organisations • Advice on type of information available on local services (e.g. bin collections, doctors, schools, bus services) and where to find it 	Observation of sign-ups & study of documents: quantity of different forms and leaflets; lack of consistent branding; disconnect between sign-up and tenancy management	✓	✓	We will review information available and local links and include this as part of our review of the sign-up pack. We will also include this on our website, the Plus Dane app, and other media available. This will be digital but we will have the means to provide this in	See point 4.2 Add Plus Dane website as a link to the Plus Dane App Include information on added value services as detailed in recommendations

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<ul style="list-style-type: none"> • Training opportunities available and information about regular alerts • Contact information e.g. Customer Access number, web address, and space for the name and housing officer contact details to be completed pre sign up • Location of stop tap, meters, boilers to be completed pre sign-up • Plus Dane's commitment as a landlord 				printed format if needed	
<p>4.4 Review information the Choice Based Lettings system gives on running costs of the home. If it is poor, provide a fact sheet at sign up. In the longer term, work with Choice Based Lettings schemes to establish a set of information for advertised properties.</p>	Panel suggestion	✓	✓	Guidance of running a home is included as part of our affordability assessment.	<p>Direct customer to affordability website</p> <p>promote links to energy efficient saving websites, other partners on money management on PlusDane and will work with CBL partners to improve information on their sites or add links</p>

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					Explore other possibilities of providing financial information on running a home
5.1 Review the existing process for identifying any potential tenants needs prior to sign up; Also for referrals made and actions taken by staff following the sign up.	Information from staff focus group and study of existing paperwork	✓	✓	Sustaining a tenancy is one of our key objectives we have included a review in our corporate plan	Include as part of the tenancy sustainment review planned for Q3
5.2. Identify standard signposting information for tenants hitting certain profile e.g. over 70's, under 25's and families with preschool children.	Discussion Panel and staff focus group	✓	✓	The Income team and financial Inclusion team work with some key partners who support our customers and will promote this information.	<p>Identify list of organisations</p> <p>Promote partners- RAISE/Money Advice Group and others using intranet and Plus Dane website</p> <p>Will we have relevant information for different segments on the website.</p> <p>We will utilise customer segmentation information to promote/identify/target our campaigns</p>

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5.3 To consider staff training/briefings on the additional support available to new tenants to support effective signposting to cover internal Plus Dane services and those provided by external agencies.	Training needs identified in staff focus group	✓	✓	As part of the restructure individual training has been identified for each officer, this includes the training identified in 5.3	Specific training has been identified and being planned in for 17/18
5.4 Produce a video of all additional services available for Plus Dane customers and post online in a Plus Dane portal. <i>(links to 4.3)</i>	Study of existing paperwork and question about process in staff focus group	✓	✓	This supports a number of actions and we will look to produce some interactive media	Media to be produced
5.5 Web portal links to videos (existing You Tube or in-house produced) about common things you may need to do in your home, e.g. how to bleed radiators; turning a stop cock; resetting your electrics. In-house produced videos/training could be produced by Plus Dane apprentices, ensuring both branding and Plus Dane added value are conveyed to tenants.	Study of information provided and staff focus group	✓	✓	Agree	See action 4.1 New housing apprentices involvement in developing media
6.1 To consider adding a question to the new tenant satisfaction survey about the sign up process.	Study of existing	✓	✓	We will include this as part of	Work with governance team, agree new

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	information held by Plus Dane			our monthly satisfaction survey	question and include in satisfaction results
6.2 Consider what performance management measures can be implemented to ensure that all lettings officers are offering flexibility in terms of location of sign-up.	Study of existing information held by Plus Dane	✓		We will monitor this more generally as part of overall satisfaction.	As in 1.5
6.3 Review information recently collected about why tenancies fail in their first year to see if there are any information or support services that could be promoted at sign up to help support the tenancy. This links to 5.4	Staff focus group and study of Existing information held by Plus Dane		✓	This is included as part of the wider neighbourhood corporate plan	Review tenancies failing
6.4 Look at recording questions asked by tenants at sign up to produce a frequently asked questions document and help to continually improve information.	Panel suggestion	✓	✓	We will include this as part of our service improvement and information we provide to the customer	Review survey responses, Extract any information from the check-list and use to inform FAQ's
7.1 Need to ensure that all relevant forms update automatically on the housing management system and that the system is updated automatically by information input during the sign up.	Staff team identified no automatic document update		✓	Agree to this aim. Part of new Housing Management specification.	To be included in the specification for housing management system (HMS).
7.2 Sign ups should be completed on tablets to enable remote working and	Staff focus		✓	As part of our IT strategy we are	As part of our short term strategy Tablets

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maximise flexibility.	group			looking at better ways of working/agile working and identified the need for short/long term solutions	ordered for the team
7.3 Facility for remote sign up via secure web portal, for tenants who want it.	Idea from staff focus group discussion	✓	✓	Agree to this aim. Part of new Housing Management specification.	To be included in the specification for housing management system (HMS).
7.4 Consider downloading all relevant documentation relating to the sign-up on a new portal that can be accessed via the company website (for example, tenancy agreements, sign up pack, useful contacts, link to website re local services).	Panel suggestion	✓	✓	Agree to this aim. Part if new Housing Management specification.	To be included in the specification for housing management system (HMS).
7.5 Consider the needs of tenants who are vulnerable who may not be able to access services digitally.	Panel suggestion	✓		We currently do, and will continue to consider as part of service digitisation.	Part of service digitisation and Customer Frist Programme

8. Next Steps

We hope that our scrutiny review has helped to inform how the sign-up process can be improved to bring both business efficiencies and improve the tenant experience.

We would now ask that the Board considers and approves both this report and the attached action plan.

The service Director will provide quarterly updates on progress against the action plan to both the Neighbourhood Committee and ourselves.

We would like to thank all the tenants and staff who gave their time to feedback and speaking to us honestly and openly about their ideas for improvement.

We look forward to hearing your views on our findings and recommendations.