

Group / Association Name	Island Homes (part of One Housing Group)
Group / Association Number	L4451

Col 1	Col 2	Col 3	Col 4	Col 5	Col 6	Col 7	Col 8	Col 9
Issues	Recommendations and key AC Comments	AC target date	IH Actual or Target Completion Date	Proposed RSL plan which should be consistent with SMART targets	Actual Actions To Date	TSA Comment	Status & Notes	Comments and explanation of evidence
<b>R1. Island Homes should improve access to the service and customer focus by:</b>	<p>Ensuring that service standards are comprehensive, understood by customers and staff, and are regularly monitored and reported upon;</p> <p>The approach to agreeing, publishing, monitoring and reporting performance against standards is poor. Standards are not comprehensive or reported regular to residents.</p>	20/3/2009	<p>11/02/09</p> <p>20/04/08</p> <p>20/03/09</p> <p>27/04/09</p> <p>20/10/08</p> <p>20/03/09</p>	<p>Island Homes Board to approve Group strategic and IH operational action plans monitor KPIs and resident satisfaction returns via quarterly board meetings and in line with the performance monitoring and reporting framework.</p> <p>Implement the IH performance reporting cycle, publishing and reporting via consumer panels, news-letters, and resident associations. Feed back suggestions on service improvement to the policy team via the corporate improvement project team.</p> <p>Review current published IH service standards and remove all standards that cannot be monitored, Incorporate with the groups comprehensive service standards, update the draft handbook and consult with tenants.</p> <p>Complete consultation process, launch handbook &amp; place on website</p> <p>Adopt assessment methodology used by industry (RSLs) to collate performance data for KPI reporting. Implement a suite of industry standard KPIs and benchmark performance with local and national peer groups.</p> <p>Restructure IH front line services to support group integration plans and performance management framework. Transfer key services defined as weak in the AC report to the Customer Contact Centre (CCC) on target.</p>	<p>Board approval of strategic plans obtained. IH action plans approved and monitored</p> <p>Performance monitoring and reporting cycle put in place, KPIs monitored &amp; performance reported to staff, Board and residents.</p> <p>Customer standards consulted on and agreed by residents. Standards are monitored, reported and published.</p> <p>Full suite of KPIs in place that are collated using industry standard methodology that meet regulatory requirements and are benchmarked against peer group.</p> <p>Comprehensive reporting framework in place. Regular reporting of performance against standards to residents.</p> <p>Staff restructure complete and services transferred to Customer Contact Centre.</p>	<p>(1) We need evidence of service standard monitoring</p> <p>(2) Feb 09 Newsletter to residents still only shows repairs statistics</p> <p>(3) Evidence of Comprehensive Reporting Framework required</p> <p>(4) Please specify which Board Minutes adopt the OHG 'Service Standard Bible' and how this is being implemented.</p>	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li><a href="#">Board minutes approving strategic plans</a> - demonstrating governing body approving and monitoring performance against key target.</li> <li><a href="#">Tenant handbook including IH service standards</a>- demonstrating that service standards are comprehensive and published.</li> <li><a href="#">KPI report</a>- demonstrating a full suite of KPIs including resident PIs.</li> <li><a href="#">QHS and Pie benchmarking reports and House Mark XLS</a>-demonstrating that services are benchmarked against peer group.</li> <li><a href="#">Resident information on the transfer of services to the CCC</a>-demonstrating successful migration of key services.</li> <li><a href="#">Performance monitoring and reporting cycle with examples</a> - demonstrating comprehensive monitoring &amp; reporting in place for IH</li> <li><a href="#">Newsletter containing resident information and performance against KPIs</a> - demonstrating regular reporting to residents.</li> </ul> <p>Additional evidence provided in response to Col 7 and additional questions raised on the first return</p> <ul style="list-style-type: none"> <li><a href="#">Performance Management Framework (PMF). An implementation Strategy</a></li> <li><a href="#">Service standard Consultation programme</a></li> <li><a href="#">Outcomes report for signage and environmental works, signage consultations for CCTV, and final signage designs following consultation</a></li> </ul>	<p>Response to TSA comments and additional questions raised on the original return.</p> <p>(1) We have provided additional evidence of service standard monitoring hyperlinked in Column 8.</p> <p>(2) Newsletter and repair statistics</p> <p>The principal contact for most residents is the maintenance service, so it is right that this is a priority in terms of monitoring. The existing report (e.g. in the Feb 09 report) does also include other indicators that may be of interest to residents. The new Group KPI report, which will be published on the website on a monthly basis from mid June, will list a large number of other indicators, including all of the indicators on the current Island Homes KPI report plus a number of others e.g. contact centre response times, complaint response times and tenant visits.</p> <p>(3) Reporting Framework</p> <p>Evidence of IH's comprehensive performance monitoring and reporting cycle is attached with examples. This is now being incorporated into the Group's <a href="#">Performance Management Framework (PMF). An implementation Strategy</a> has been developed and the launch of the PMF commences in June. Groupwide consultation for the groupwide service standards will be carried out during May and June, <a href="#">see service standard Consultation Programme</a> attached. This framework expands on the IH frameworks and better links monitoring and reporting to centralised functions.</p> <p>(4) Service Standard Bible</p> <ul style="list-style-type: none"> <li>The service standard bible has been replaced by the service standards leaflets and incorporated into the leaseholder and tenant handbooks. The bible was therefore not adopted by the Board. The Board agreed the service improvement Action plan which included service standards. Benchmarking is currently taking place for Group Service Standards and SMART targets are being developed for each standard where possible. This exercise will be completed by the end of May, ready for resident consultation.</li> <li>The service standards will be rolled out in conjunction with the Group PMF and monitoring of the service standards will be done regularly under the new reporting framework. Service standards for IH have been incorporated into the group standards. We developed a new set of KPIs in line with HouseMark guidance and implementing systems to enable their capture where necessary (e.g. new complaints, tenant visit and estate inspection systems, new arrears reports etc). This commenced in April 2008 and was complete by July 2008. This enabled us to <a href="#">use the Housemark, and PIE benchmarking services</a>.</li> <li>QHS data is also used to benchmark with other QHS members we have attached an example of service consultation where residents have influenced service change - <a href="#">outcomes report for signage and environmental works, signage consultations for CCTV, and final signage designs following consultation</a></li> <li>Island Homes services were migrated to CCC on 23 Feb 2009.</li> </ul>

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<b>R1. Island Homes should improve access to the service and customer focus by:</b>	ensuring that all information (including leaflets, website and recorded telephone messages) is periodically reviewed and updated;  Some leaflets contain out of date information, printed leaflets would improve appearance. Interim Tenant handbooks issues, pending a group wide review. Leaseholder hand book in draft form and not on website. Limited resident involvement in the production of newsletters. Web site would benefit from a more comprehensive content, ie leasholder section, inclusion of board dates and minutes.	20/03/2009	31/12/08  01/03/09  20/02/09  27/04/09  27/04/09  27/04/09  20/02/09	Update leaflets available in reception areas to remove information that reflects post transfer services which are no longer in operation. Review content of remaining leaflets and update all contact numbers. Provide temporary leaflets and produce a timetable for printing re-branded professional versions of all leaflets.  Update current telephone system to enable call monitoring and reporting. Introduce standard telephone greeting and voicemail procedure.  Link the draft leaseholder handbook to group review. Carry out leaseholder consultation and incorporate resident changes. IH leaseholder Handbook to reflect stock transfer promises ( RTB)  Consult on interim tenant handbook incorporate resident changes and publish  Place draft LH handbook on new web site Publish LH handbook  Feed AC comments into the group review of the OHG website. Develop an IH information page accessible from the front page and increase resident information including the inclusion of board minutes, newsletters, updated hand books and performance information.  Include resident articles in quarterly newsletter and financial support estate news letter produced by TRAs Community groups	Accurate and useful leaflets in place which are fit for purpose. Schedule for leaflet review and reprint in place.  New telephone system in place to monitor response times, quality and accuracy of all calls and recorded messages.  Resident involvement in the production of the tenant and leaseholder handbooks.  Consultation on leaseholder hand book completed and RTB information included.  Consultation on tenant hand book completed. Handbook published  Publication date of handbooks set.  Interactive website launched which incorporates AC recommendations on access and information, holds comprehensive information and is easy to navigate around. Resident articles included in news letter	(5) It is unclear from the evidence what input there was of resident involvement in the drafting of the Handbooks.  (6) There is no evidence that Leaseholder Handbook specific to IH leaseholders has been sent to leaseholders or placed on IH / OHG website.  (7) It would be useful to have a précis of how the re-branding of leaflets has gone (eg. IH's website appears to have been taken down)	Documents attached on evidence return and fully explained:  <ul style="list-style-type: none"> <li>• <a href="#">Reception leaflet check list</a> - demonstrating the review that was carried out of information available in reception and the information that has been put in place as a result.</li> <li>• <a href="#">Telephone procedure, statistics and capability information</a> - demonstrating improved monitoring and performance against target. Can we get this</li> <li>• Website: <a href="http://www.onehousinggroup.co.uk">www.onehousinggroup.co.uk</a> - demonstrating our improved website that is easier to navigate and find the information needed. The site is also now more interactive site and includes more information that is applicable to residents.</li> <li>• <a href="#">Leaseholder handbook consultation plan and draft handbook</a>- demonstrating completion of review and resident involvement.</li> <li>• <a href="#">Tenant handbook consultation plan and draft hand book</a>- demonstrating completion of review, tenant consultation and launch date of handbook.</li> <li>• The 4 TRA have confirmed they prefer to continue to produce their own newsletters and the production will receive financial aid from IH. In addition we have allocated a page of the quarterly IH newsletter for residents contributions, good news stories etc. This will be in the summer addition.</li> <li>• Example News letter with resident article( BWO) – demonstrating that resident articles are include.</li> </ul>	Response to TSA comments and additional questions raised on the original return.  (5) Resident Involvement in Tenants Handbook Consultation on the Tenants Handbook was carried out with the three Regional Consumer Panels, the Maintenance Forum (which has representatives from each of the Group's three RSLs) and the Chairs of Island Homes' four TRAs. It was also sent to all residents on Community Investment's "Involved Residents" database, i.e. residents who have shown an interest in getting involved in the Group's work. All residents are regularly invited to join the database. The handbook was also placed on the website to give all residents the chance to comment. See <a href="#">Tenants Handbook Consultation Plan and Board Report</a> on outcomes of consultation attached. Also see <a href="#">response cards</a> which are one way in which residents are invited to join the "Involved Residents" database.  (6) Consultation on Leaseholders Handbook - Consultation on the Leaseholders Handbook was conducted with the Glengall and St John's Leaseholders Association as well as with the Group Leaseholder Forum. All leaseholders from the Group's three RSLs were invited to join this Forum. See <a href="#">Leaseholder Handbook Consultation Plan</a> and <a href="#">Leaseholders handbook for IH</a> which has now been published. - the Leaseholder and Tenant Handbooks are now finalised and printed. Electronic versions have been added to the website. (7) Re-branding of leaflets - Following a review of literature in place for the Group's other RSLs, a range of Island Homes specific leaflets were produced and are available in all IH office areas. - See <a href="#">reception checklist</a> used by reception staff for the full list of leaflets available in reception areas. All information is also available on the website: <a href="http://www.onehousinggroup.co.uk">www.onehousinggroup.co.uk</a> - A groupwide exercise is also underway to produce professionally printed key leaflets. Stage 1 is complete with the <a href="#">tenant handbook</a> at print along with the group complaints leaflets. Stage 2 all leaflets will undergo a routine review and re-publication exercise from January 2009.

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<p><b>R1. Island Homes should improve access to the service and customer focus by:</b></p>	<p>regularly monitoring customer satisfaction with all aspects of the service and using this information to inform plans for improvement;</p> <p>Customer care, consultation and satisfaction.</p> <p>No robust strategy to deliver customer care. A customer care training programme has commenced but is not yet completed, consultation with residents and the development of services is weak.</p>	20/03/2009	<p>20/12/09</p> <p>20/06/08</p> <p>20/02/09</p> <p>20/03/09</p> <p>ongoing</p> <p>ongoing</p> <p>Extended date 30/07/09</p>	<p>The group's strategy to deliver customer care is detailed in the service standard bible and translated in the group's service standards. Carry out customer care training for all front line staff, review customer satisfaction data and complaint data to assess impact on service.</p> <p>Launch Resident Involvement Framework (RIF) to improve resident's consultation and communication process.</p> <p>Restructure the Tenant Participation Officer role to include community investment and resident engagement objectives to ensure residents have participation options and access to advise to support the objectives of the RIF and service standards.</p> <p>Promote a wide range of ways in which residents can get involved and give feedback on services. Actively encourage all residents to get involved, particularly those who have not previously engaged with the organisation</p> <p>Monitor resident satisfaction and performance against service targets and report in line with the operational performance-reporting framework.</p> <p>Increase the organisation's monitoring of diversity to ensure all communities are influencing and shaping the improvement plans.</p> <p>Obtain membership details of all existing TRAs.</p>	<p>Customer care training complete and impact assessed using satisfaction rates and complaints.</p> <p>Community Investment Team (CIT) restructured to incorporate community investment and service improvement tasks.</p> <p>IH residents involved in the Group's maintenance forum Implementation of "You Said We Did" leaflets showing how resident feedback influences our service delivery.</p> <p>Increased resident attendance at inspections. Published inspection dates and times.</p> <p>Published targets and performance monitoring programme in place.</p> <p>Targets in place for collection of profile information. Increased engagement with minority groups. IH managers attend TRA meetings and feed back issues raised. Suggestions incorporated into service improvement plans</p>	<p>(8) Although it is un-audited, evidence has been supplied of the monitoring of customer satisfaction in Q1 of 2009</p>	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li>• <a href="#">Job descriptions for Community Investment Officer and former Tenant Participation Officer roles</a>- demonstrating wider objectives for tenant engagement.</li> <li>• <a href="#">Customer care training plan and evaluation</a> – demonstrating completion of training, impact assessment and commitment to consistency of service delivery.</li> <li>• <a href="#">Complaint analysis</a> – demonstrating customer concerns with the service and feed back into delivery plans</li> <li>• <a href="#">Resident involvement framework</a> – demonstrating commitment for increased resident participation.</li> <li>• <a href="#">Maintenance forum make up and minutes</a> – demonstrating a wider range of resident involvement and how residents inform improvement plans.</li> <li>• <a href="#">Estate inspection publication flyer and attendance report</a>- demonstrating monitoring and resident involvement in checking service standards.</li> <li>• <a href="#">How to get involved leaflet</a>- demonstrating a range of ways for residents to become involved.</li> <li>• <a href="#">KPI report</a> – demonstrating the organisation's monitoring of performance.</li> <li>• <a href="#">You Said We Did leaflet</a> – demonstrating how residents have influenced change.</li> <li>• <a href="#">TRA minutes</a> – demonstrating effective communication and attendance of Managers at resident meetings.</li> <li>• <a href="#">Letter requesting membership details</a>- demonstrating that TRA are representing the views of our diverse communities.</li> </ul>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(8) No response required</p> <p>Response to question raised on Adrian's evidence return</p> <p>- Information on how to get involved is regularly sent to all residents and all residents are regularly encouraged by Community Investment Officers to get involved. See <a href="#">Getting Involved Leaflet</a>. The Involved Resident database held by Community Investment will be used moving forwards to measure how many IH residents are involved.</p> <p>- A key objective for the Community Investment Officers and the Community Liaison Officer is to reach and engage with a diverse mix of residents, including hard-to-reach and minority groups. See job role of <a href="#">Community Liaison officer</a> and <a href="#">Community Investment Officer role that replaces the old Tenant Participation Officer role</a>.</p> <p>- Members are carefully selected for the IH Regional Consumer Panel and Maintenance Forum to ensure the diverse community is well represented.</p> <p>- Residents are regularly invited to get involved in estate inspections. See <a href="#">example of a poster</a> put up on estate noticeboards to notify residents of forthcoming inspections. See <a href="#">Estate Inspections Attendance Reports</a> for figures showing how many are attending each inspection.</p> <p>- We are now monitoring satisfaction with repairs service by BME as well as providing an overall figure. See <a href="#">KPI report</a>.</p> <p>- Residents can provide feedback, comments and suggestions through the "islandhomesresidentsbox" email address. All emails are responded to and outcomes will be fed back to residents via 'You Said, We Did' leaflets. Feedback received through this inbox and from resident group meetings is passed on to the Service Improvement Team to incorporate into Improvement Planning and feed back to staff via the Service Improvement Monthly team newsletter. See a draft of the first <a href="#">You Said We Did leaflet</a> that is currently being worked on.</p>

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<b>R1. Island Homes should improve access to the service and customer focus by:</b>	<p>ensuring that there is regular and effective consultation and communication with tenants and leaseholders.</p> <p>Consultation with residents in generally weak. Particularly with Leaseholders and TRA.</p> <p>Complaint management has not been robust.</p>	20/03/2009	<p>30/4/09</p> <p>20/05/09</p> <p>20/05/09</p> <p>20/03/09</p> <p>20/05/09 ongoing</p> <p>20/06/09</p> <p>30/12/08 ongoing</p> <p>20/11/09 ongoing</p>	<p>Obtain Board approval of a Communications Strategy to strengthen and structure how we consult and communicated. Develop Implementation plans for all consultation on key service. Circulate to all staff to ensure objectives are clear monitored and targets understood.</p> <p>Increase leaseholder representation on forums to ensure leaseholders views are captured and feed into service improvement plans.</p> <p>Set up an Island Homes specific resident consumer panel to monitor performance and influence service delivery plans. Ensure membership includes leaseholders. Support all new groups wishing to engage.</p> <p>Set up a leaseholder forum and hold quarterly meetings with the four TRA Chairs to obtain their views and improve communications between the TRAs and the organisation.</p> <p>Establish terms of reference and membership records for all groups supported by IH to ensure full representation of the diverse community.</p> <p>Working with residents Appoint a "Resident Friend" to engage and support new groups and improve the relationship between Island Homes and its residents.</p> <p>Analyse customer complaints and feed lessons learnt into improvement plans. Implement a community investment programme Upgrade web site to ensure alternative process for communication is in place.</p> <p>Produce quarterly IH specific newsletters.</p>	<p>Structured communication strategy in place.</p> <p>Forum membership includes leaseholders.</p> <p>Consumer panel in place with clear terms of reference. Membership is representative of tenants and leaseholders.</p> <p>Residents consulted and involved in monitoring and influencing service delivery through a wide range of panels and forums. .</p> <p>Regular communication at all levels with the organisation with resident representatives of all tenure groups.</p> <p>Membership records and terms of reference in place for all resident groups supported by IH.</p> <p>Resident friend appointed. Complaints used to influence service improvement plans</p> <p>Complaints analysis, reported and</p> <p>Quarterly Newsletters produced, community investment programme in place.</p>	<p>(9) What is the status of the leaseholder forum?</p> <p>(10) If leaseholder involvement is incorporated into resident panels, where is evidence that leaseholders are happy not to have a specific forum (given they account for almost 40% of residents)?</p>	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li>• <a href="#">Communication strategy</a>- demonstrating how we will communicate with stakeholders.</li> <li>• <a href="#">Leaseholder meetings minutes and agenda</a> – demonstrating regular communication with leaseholders groups.</li> <li>• <a href="#">Consumer panel make up and terms of reference</a> – demonstrating leaseholder attendance and how residents are involved in the decision making process.</li> <li>• <a href="#">Minutes of TRA meetings</a> -demonstrating improved communication and conflict resolution with TRAs.</li> <li>• <a href="#">How to get involved leaflet</a> – demonstrating steps taken to promote alternative ways for residents to get involved in influencing service delivery and increase resident engagement.</li> <li>• <a href="#">Resident Association recognition agreement</a> –demonstrating a structured approach and clear guidelines for working with resident associations.</li> <li>• <a href="#">Complaint analysis</a> – demonstrating learning from resident complaints.</li> <li>• <a href="#">Resident friend job spec</a>- demonstrating intentions of the organisation to improve communication with disaffected residents.</li> <li>• <a href="#">Community Investment Programme of Services</a> – demonstrating the organisation's approach to engaging with all sectors of the community it serves.</li> <li>• <a href="#">Website: www.onehousinggroup.co.uk</a> - demonstrating organisation's approach to communicating with diverse groups and availability of translating services.</li> </ul>	<p><b>Response to TSA comments and additional questions raised on the original return</b></p> <p><b>(9) Status of Leaseholder Forum</b></p> <p>- The Leaseholder Forum is a recognised and constituted resident group. It held its first meeting on 25 Feb 09. Leaseholders from each of the Group's three RSLs were invited to join the Forum. See <a href="#">agenda</a> and <a href="#">minutes of February meeting</a> and <a href="#">agenda</a> for May meeting.</p> <p><b>(10) Leaseholder Involvement</b></p> <p>- Leaseholders are well represented on the IH Consumer Panel and the four TRAs as four of the 10 members of are leaseholders</p> <p>- The four TRA Chairs are also leaseholders</p> <p>- All leaseholders were also invited to join the leaseholder forum (detailed in <b>9</b>)</p> <p>- We are keen to fully document membership of forums and TRAs by tenure group. The Community Investment Team is working with existing residents and community groups to agree and sign Recognition Agreements that set out the Terms of Reference for each group including membership details. See <a href="#">minutes of the meeting with TRA Chairs</a> on 29 April 09 showing latest progress and <a href="#">Recognition Agreement Template</a></p> <p>- Residents are regularly reminded about the variety of ways in which they can get involved and provide feedback. Feedback received is monitored on an ongoing basis to identify which methods are most popular and working most effectively. See <a href="#">analysis of emails received in IH resident inbox</a>.</p> <p>- The Resident Involvement Handbook was completed in April 09 and was sent to all residents and made available on website. See <a href="#">PDF of handbook and consultation plan for the handbook</a>.</p> <p>- A Communications Strategy has been drafted and approved by the Board. It will go out for consultation with residents at the IH Consumer Panel, the TRA Chairs and the Involved Residents database to ensure it meets residents' needs and requirements. Once consultation is completed at the end of August, a policy will be drafted and implemented incorporating feedback from residents. See <a href="#">draft Communications Strategy</a></p> <p>- Please see <a href="#">draft job spec</a> for the role of the Resident Friend. We will be consulting with residents to ensure it meets their needs and requirements.</p>

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<b>R2. Island Homes should improve its approach to meeting the diverse needs of its residents by:</b>	ensuring that a diversity strategy is in place and equality action plans to meet regulatory requirements;  Diversity strategy not agreed by board. Disability and gender action plans not in place. Organisations commitment and approach to diversity issues not embedded.	20/05/2009	30/07/08	Obtain Board approval of equality and diversity strategy.	Diversity strategy approved by Board.	(11) No specific E&D plans for IH. We need to see the Action Plans, are group-wide OHG Action Plans being used instead of IH's? If so where is the board approval adopting this?	Documents attached on evidence return and fully explained:  <ul style="list-style-type: none"> <li>Minutes of Board meeting approving E&amp;D strategy- demonstrating governance approval of strategy.</li> <li>Letter to residents, attendance list and questionnaire for focus group_ – demonstrating consultation on E&amp;D strategy.</li> <li>E&amp;D Action plan – demonstrating targets in place and compliance with regulatory code of practice.</li> <li>Assistant Director of Corporate services appointed as Diversity champion - demonstrating organisations commitment and approach to embedding diversity plans and delivery.</li> <li>Resident impact action plan and resident impact assessment formR2/Resident Impact Assessment Form.doc – demonstrating process to assess impact.</li> <li>E&amp;D Consultation plan – demonstrating process in place to obtain feedback from residents to feed into service improvement plans.</li> </ul>	<b>Response to TSA comments and additional questions raised on the original return</b>  (11) Equality & Diversity Plans The E&D plan for IH forms part of the Group E&D plan. Action plans are groupwide and the board minute adopting this is attached. (12) Profiling Data - Resident profiling exercise is being undertaken currently See document for resident profiling information and profiling form. Evaluated information is attached later in the document. - Resident Impact Action Plan and Resident Impact Assessment Form have been developed. - Staff have come up against various issues with collecting resident profiling data, namely residents found some of the questions intrusive. To overcome these issues, the form has been amended and shortened to include just the core data required. Various approaches are being taken to obtain the data – sending the form out with the April newsletter along with a letter explaining why we are collecting the information and offering the incentive of entering those who complete and return the form into a prize draw. A doorknocking exercise is also going to be conducted. - A consultation plan for the E&D Strategy has been developed. - A focus group was held on 19 August to consult with residents on the proposed E&D Strategy. See invitation letter to residents, attendance list and questionnaire and accompanying letter, example of incentive letter - All IH staff are receiving training on E&D, the Board will commence training on 12 and 13 June and training is being carried out with residents on 7 October 09. All involved residents have been invited to attend and panel and forum members are encouraged to attend to help them perform their roles more effectively. - All participants in training courses are asked to fill out evaluation forms so that the outcomes of courses can be assessed and future training needs identified. See attached an example of an evaluation form used to assess the impact of a training course. - Programmes that reflect the specific needs of some groups are being offered to IH residents, e.g. Employment and Training Courses, Money Matters courses, youth services schemes and initiatives. See attached Community Investment Programme of Services for full list of initiatives. Also see Football Coaching Factsheet and Careers Day Promotional Leaflet.
			30/08/09	Set up a focus group to review the groups E&D strategy.	Consultation on E&D strategy complete.			
			20/05/09	Develop and implement a diversity action plan which includes disability and gender equality plans, monitor progression against key targets set in the plan and report progress in line with the Group performance reporting framework.	Diversity action plan includes gender and disability plans in place and monitored. Regulatory requirements being met.			
			20/04/09	Identify a staff member at a senior level to act as a Diversity Champion and lead on the implementation of the action plans.	Project sponsor – Executive member appointed as Champion. Progress against plan monitored and reported via Executive Team meetings and Board in line with the Group's reporting framework.			
			Ongoing	Equality and diversity data and issues for IH are reported and feed into service improvement plans via project meetings.	Improvement plans shaped by IH profile and needs of residents.			
			20/03/09	Working with the central policy team develop an impact assessment framework.	Impact assessment framework in place and monitored.			

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<b>R2. Island Homes should improve its approach to meeting the diverse needs of its residents by:</b>	<p>taking steps to maximise the profiling data held about residents and using this to improve and target services;</p> <p>No comprehensive information on the profile of residents. Unable to effectively target or monitor the use of services by different groups</p>	20/05/2009	20/05/09	Collate current profile data held on residents and feed information into IT management systems. Analyse, identify data gaps, and target collection via completion of resident profiling forms. Measure collection rates and identify new strategies to increase volume of data held.	Current data held identified and analysed. Data collection gaps identified and new process put in place to increase collection rates.	(12) Evidence needed to show what steps are being taken to maximise profiling data	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li><a href="#">Profile data analysis</a>- demonstrating improvement in information held.</li> <li><a href="#">TRA minutes</a> -demonstrating residents views on the need to collect information and suggested changes to the form</li> <li><a href="#">Amended profile form</a> – demonstrating the information we wish to collect is influenced by residents.</li> </ul>	<p><b>Response to TSA comments and additional questions raised on the original return</b></p> <p>(12)</p> <p>- See previous page for details of how we are obtaining profiling data</p> <p><b>General questions raised</b></p> <p>- We are aware from census information that around 40% of our residents are of Bengali origin therefore a Bengali translated version of all letters is sent to Bengali speakers.</p> <p>- We are working to identify other special interest groups so that services can be adapted to fit the needs and requirements of all groups.</p> <p>- Signs in IH office reception areas are clearly visible to advise residents that all information can be translated into different languages and formats upon request and an interpreter can be provided for face to face meetings. The <a href="#">website</a> also gives details of this facility.</p> <p>- See previous page for details of who has received training and planned dates for those soon to receive the training.</p> <p>- Evaluation forms completed by participants in training courses are reviewed and analysed to assess the impact of the training and to identify future training needs.</p>
			20/05/09	Review data collection pace and work with residents to identify reasons for slow collection and non-completion of forms, amend process to incorporate resident suggestions and improve collection.	Resident concerns understood and data profile forms adjusted.			
			20/05/09	Utilise current profile data held on system and use to inform improvement plans and adapt services to meet residents' needs.	Data held analysed and used to develop accurate community profile and to shape future service plans.			
			20/05/08	Develop new tenant profiling forms and set targets to capture profile information for all new residents. Use collected information to develop a clear understanding of the association's community. Feed profile information into community investment plans.	Process in place to obtain profiling information for all new residents. 100% data held on all new residents. Data used to develop community profile.			
			01/06/09	Appoint a data collection officer to support and encourage residents to complete profile forms. Use information gathered to further develop the organisation's approach to equality and diversity.	Data Collection officer appointed.			
<b>R2. Island Homes should improve its approach to meeting the diverse needs of its residents by:</b>	<p>ensuring that all staff and Board members are trained in diversity issues; and</p> <p>Mixed approach to equality training for staff. Housing management and support staff to receive training along with Board members.</p>	20/05/2009	30/10/08	Set targets for the completion of outstanding staff appraisals.	Staff appraisals completed to target, training analysis complete.	(13) We need more comprehensive information about who is receiving diversity training and when.	<p>Documents attached on evidence return and fully explained:</p> <p>See E&amp;D action plan for detailed information to support joined up approach to E&amp;D.</p> <ul style="list-style-type: none"> <li><a href="#">IH training programme</a>- demonstrating who is receiving training .</li> <li><a href="#">Example of Evaluation form</a> – demonstrating how training is impact assessed.</li> <li><a href="#">Board away day agenda</a> – demonstrating diversity training for governing body.</li> <li><a href="#">Board member advert</a> - demonstrating active recruitment for under-represented groups.</li> <li>Current external recruitment frozen due to ring fencing and job matching process from re-structure</li> </ul>	<p><b>Response to TSA comments and additional questions raised on the original return</b></p> <p>(13) Diversity Training</p> <p>- All IH staff have been trained in E&amp;D</p> <p>- The Board will be trained on 12 and 13 June</p> <p>- Training is being carried out with residents on 7 October 09.</p> <p>- All involved residents have been invited to attend the resident training session and panel and forum members are encouraged to attend to help them to perform their roles more effectively.</p> <p>- All those who participate in training courses are asked to fill out evaluation forms so that the outcomes of courses can be assessed and future training needs can be identified. See attached an example of a <a href="#">training evaluation form</a></p> <p>- Evaluation forms will be reviewed and analysed once all training is complete to evaluate the impact and effectiveness of the training sessions and to identify any future training needs.</p>
			30/11/08	Undertake training needs analysis to inform delivery of work-related training and diversity training program.	E&D training delivered for all front line staff.			
			20/05/09	Implement diversity-training programme for staff and Board members to ensure all understand the Group's Equality and Diversity Policy. Evaluate training to identify success of training.	Training evaluated and staff understanding reviewed.			
			20/12/09	Collate diversity statistics to fully understand the make up of staff. Take active measures to encourage job applications from under-represented groups including re	Collated staff profile data assessed against community profile linked to recruitment and retention policies.			
			20/06/09 ongoing	Positively encourage recruitment of under represented groups to governing body	All external recruitment actively encourages applications from under represented groups.			

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<b>R2. Island Homes should improve its approach to meeting the diverse needs of its residents by:</b>	<p>ensuring that the take-up and outcomes of community services funded by Island Homes are monitored and evaluated.</p> <p>No proper scrutiny of community chest payments. No information on the profile of groups or individuals using community facilities.</p>	20/05/2009	20/03/09 20/03/09 20/05/09 20/06/09 20.06/09 Ongoing	<p>Establish and implement a funding application process for community chest payments.</p> <p>Set up a panel to assess applications and payment award and introduce an application submission timetable.</p> <p>Implement a process to assess outputs of all funded projects and measure against objectives stated in funding applications, utilising feedback from project organisers and participants to evaluate the success of each project.</p> <p>Introduce a process to measure take up of funded projects by ethnicity. Measure information collected against community profile data to establish which groups are not accessing the service.</p> <p>Working with the Community Investment Team set targets to obtain documented membership of the four TRAs. Use membership information to assess against community profile data and identify under-represented groups. Work with the CIT and resident friend to develop engagement strategies to increase involvement.</p> <p>Use data collected on resident membership and profile to inform the RIF and increase engagement from under- represented groups.</p>	<p>Funding application process in place and understood by all residents.</p> <p>Panel in place to assess funding applications.</p> <p>System in place to identify which groups are benefiting from funded projects</p> <p>Outcome of each project evaluated, recorded and used to assess future funding applications.</p> <p>Attendance lists for each project assessed by diversity.</p> <p>Residents and Board aware of outcomes of all funded projects.</p> <p>Future objectives for funding projects set by community profile, output assessments and information from CIT.</p> <p>Residents are fully supported through application process and applications meet the requirements of the association.</p> <p>Funded projects available for all sectors of the community.</p>	<p>(14) We need evidence of community services user monitoring and outcomes.</p> <p>(15) A Community Chest Report for 2008 is supplied</p> <p>(16) Total amount of IH Community Chest grants awarded in 2008 - £38,434.55 A strategy for 2009 applications and a tightening of the criteria will need to take place before the end of the year.)</p>	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li>Application form and report on community chest payments – demonstrating application process and Information required on age groups and ethnicity.</li> <li>Panel make up sheet- demonstrating scrutiny and approval process.</li> <li>Community chest monitoring and evaluation form - demonstrating user monitoring and feedback.</li> <li>Analysis of evaluated projects - demonstrating take up and assessment.</li> <li>Letter to TRA chairs and minutes requesting membership details (majority of payments are made to the TRAs) – demonstrating working with residents groups to understand makeup of members, and groups representation by them.</li> <li>Payment award (evidence previously provided).. Demonstrating formal structures in place to award, monitor, and assess payments from the community chest.</li> </ul>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(14) Community Services User Monitoring &amp; outcomes</p> <p>- At the end of each funding period, all funded projects are assessed against the objectives stated in their funding applications to check that the aims have been achieved and that the project has stayed within budget. See <a href="#">Community Chest Monitoring and Evaluation Form</a> and the <a href="#">explanation letter</a> which are sent to all those who receive funding.</p> <p>- Funding application forms ask which groups the project is targeting. This information is used to ensure that a range of projects are being funded that benefit the diverse community. Applications ask about the target age groups and ethnicity of target users of the project. See <a href="#">application form and report on Community Chest funding for 2008</a>.</p> <p>(15) No response required.</p> <p>(16) Community Chest Strategy for 2009</p> <p>- The application process has been changed for the 2009 round of funding and rather than assessing applications on an ad hoc basis a timetabled, structured approach will be taken with submission deadlines throughout the year to improve the efficiency of the process.</p> <p>- We are working with existing resident groups to obtain their membership details. See <a href="#">letter sent to TRA Chairs on 19 April</a> asking for this information and the <a href="#">minutes of the meeting with the TRA Chairs on 29 April 09</a> showing the agreements reached to date.</p>

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<b>R3. Island Homes should improve its approach to stock investment, repairs and gas servicing by:</b>	<p>ensuring that the Group's asset management strategy comprehensively covers Island Homes' assets and has a robust action plan;</p> <p>The groups asset management strategy is not comprehensive and does not cover island homes assets and does not contain an action plan. This is a potential barrier to making clear decisions on stock retention and redevelopment.</p>	20/05/2009	<p>30/04/09</p> <p>13/05/09</p> <p>20/03//09</p> <p>20/02/09</p> <p>20/03/09</p> <p>30/05/09</p>	<p>Ensure all Island Homes' assets, including their condition are documented on the Group's asset management database and are included in the Groups asset management strategy and delivery plans.</p> <p>Monitor and report on a regular basis the number of units that have been refurbished and achieving Decent Homes Standards.</p> <p>Document and value all commercial holdings, review leases and transfer the management of stock to the Group Commercial Property Team.</p> <p>Transfer major works contract to the Group's development team and ensure effective tendering procedures are in place.</p> <p>Monitor expenditure of capital works programme against budget and report in line with the Group's reporting framework.</p> <p>With the TSA develop a Group Asset Management action plan.</p>	<p>Accurate data held on all Island Homes assets.</p> <p>Robust monitoring in place to record achievement towards Decent Homes target.</p> <p>Management of commercial units transferred to Commercial Management Team.</p> <p>Group management of the major works external programme in place and transferred on target.</p> <p>Tendering process complete. Adherence to legislation and VFM principals in place.</p> <p>Budget monitoring process in place and reported to Board.</p> <p>Action plan in place and approved and monitored by TSA.</p>	(17) No robust action plan supplied on CD? It would be helpful to see IH's asset management Action Plan	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li>Group's Asset Management Strategy – demonstrating strategy in place covering IH assets.</li> <li>Group Board report – demonstrating monitoring of progress towards Decent Homes target.</li> <li>Valuation of commercial units - demonstrating assessment and documentation of non-housing stock.</li> <li>Tendering procedures - demonstrating VFM approach and adherence to policy and EU legislation.</li> <li>Board minutes - demonstrating financial monitoring of IH budgets.</li> <li>Island Homes stock condition and major works action plan – demonstrating knowledge of stock condition and programmed time plan</li> </ul> <p>Please note that the Group's Asset Management Strategy and performance against DHS targets is the subject of separated monitoring by the TSA. IH data has also been reviewed as part of this process.</p>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(17) IH Asset Management Action Plan</p> <ul style="list-style-type: none"> <li>IH asset management plan sits within the Group's plans. See <a href="#">Group Asset Management Strategy</a>, DHS data and the stock condition and major works plan.</li> <li>The Group's Asset Management Strategy and performance against DHS targets is the subject of separated monitoring by the TSA. IH data has also been reviewed as part of this process.</li> </ul> <p>Response to general questions</p> <ul style="list-style-type: none"> <li>IH non-housing assets were surveyed by Strettons in October 2007. See <a href="#">Valuation of IH non-housing assets</a></li> <li>The comment about the use of UH was not entirely accurate: data has been transferred from our contractor's systems and was loaded in stages to our Integrator stock condition database which was already in use for the rest of the Group. Integrator does link to UH (the housing management system) as they share the same property references; this data will be loaded to UH in time to meet NROSH requirements in March 2010.</li> </ul>
<b>R3. Island Homes should improve its approach to stock investment, repairs and gas servicing by:</b>	<p>ensuring that stock condition data is robust and regularly updated;</p> <p>Stock condition information is poorly managed. There is no linkage to update the data to record renewals of boilers or refurbishment of voids.</p>	20/05/2009	<p>20/05/09</p> <p>01/03/09</p> <p>20/04/09</p> <p>ongoing</p>	<p>Transfer IH DHS data held external by external contractors onto the Groups' IT management system. (Integrator) to link data bases with day-to-day works programme.</p> <p>Transfer void management and day to day maintenance to CCC to enable better monitoring and link to DH data.</p> <p>Set up Business support team (BST) to Manage and monitor IT systems and reporting compliance.</p> <p>Monitor and report compliance against target in line with the Group's reporting framework.</p>	<p>Accurate Decent Homes data held on Group's IT systems and links to day to day maintenance activity</p> <p>Process in place to update unit records on refurbishments and void repairs.</p> <p>Compliance monitored in line with the Group's reporting framework.</p>	(18) We need to see OHG's comprehensive asset management strategy for IH assets	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li>Summary of units requiring works to achieve DH standards - demonstrating DHS data has been transferred and is monitored on the IT (integrator) system</li> <li>Asset management strategy attached under previous recommendation.</li> <li>Systems work flow -- demonstrating the transfer of day to day maintenance data external data on to the Group's IT internal management systems. (Boiler replacements and void works linked to above).</li> <li>BST structure chart- demonstrating team set up to monitor compliance and performance.</li> <li>KPIs and performance structure- evidence shown under recommendation- demonstrating monitoring and reporting framework in place.</li> </ul>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(18) Comprehensive Asset Management Strategy for IH</p> <p>In addition to information provide above:</p> <ul style="list-style-type: none"> <li>We are also now capturing routine repairs data from UH which impact Decent Homes plans in order to load them into the Integrator system. See attached a <a href="#">systems flowchart</a> showing how this works.</li> <li>Please note that the Group's Asset Management Strategy and performance against DHS targets is the subject of separated monitoring by the TSA. IH data has also been reviewed as part of this process.</li> </ul>

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<b>R3. Island Homes should improve its approach to stock investment, repairs and gas servicing by:</b>	ensuring that repairing priorities and timescales are clear and accurately monitored;	20/05/2009	23/02/09	Transfer maintenance calls, repair monitoring and ordering of services to Group Customer Contact Centre to enable more effective monitoring on:	Successful transfer of services to Customer Contact Centre on 23 February 09.	Satisfactory Evidence supplied	<ul style="list-style-type: none"> <li>Monitoring statistics – demonstrating service is monitored and reported.</li> </ul> satisfactory evidence supplied	No response required
<b>R3. Island Homes should improve its approach to stock investment, repairs and gas servicing by:</b>	ensuring that repair calls are answered promptly and the appointment system is clearly promoted and consistently implemented;  Repair calls not effectively monitored, appointments are not consistently made.	20/05/2009	23/02/09  20/05/09  20/02/09	Transfer repair handling to CCC to enable better monitoring, promote new service to all residents and stakeholders.  Evaluate first quarter CCC call handling data to assess performance against target.  Tender new contracts to ensure appointment system included, monitor performance.	Successful migration of service to Customer Contact Centre, and new service promoted to residents.  First quarter performance evaluated - Improved monitoring and reporting for call handling and the appointment process.  New contracts in place, customer satisfaction improved and appointment process in place.	Satisfactory Evidence supplied on CCC call stats	Documents attached on evidence return and fully explained: <ul style="list-style-type: none"> <li>Calls transferred to CCC on the 23.2.09</li> <li><a href="#">CCC call stats</a>- demonstrating improved monitoring of service standards of repair calls. .</li> <li><a href="#">Appointment data</a>- demonstrating appointment process now in place.</li> <li><a href="#">Customer satisfaction statistics</a> – demonstrating improved satisfaction.</li> <li>Board minutes- demonstrating reporting process.</li> </ul>	Response to TSA comments and additional questions raised on the original return  Customer Contact Centre - A letter and promotional items (a fridge magnet and business card) advising residents that Island Homes would be joining the CCC arrived with residents on Monday 9 February, giving them two weeks advance notice of the migration on Monday 23 February. - CCC call handling data since IH joined the CCC was reported to the Board at the April meeting. See the <a href="#">agenda and minutes</a> of the meeting
<b>R3. Island Homes should improve its approach to stock investment, repairs and gas servicing by:</b>	ensuring that target timescales for repairs to void properties are clear and are monitored and reported; and  Void turn around times are high, repair targets are unclear, record keeping poor.,	20/05/2009	30/08/09  20/02/09  20/9/08  20/03/09  Ongoing	Implement Group void target of 28 days and repair targets.  Produce a void standard and agree void standards with residents in time for procurement of new contractors.  Improved record keeping by Using the Universal Housing system to track and monitor progress of voids.  Monitor voids not completed within target and evaluate reasons for delay. Raise concerns with contractors, feeding delays back to letting staff.  Report performance to Board and residents in line with the Group's reporting framework.	Void and repair target in place and performance against target monitored.  Void standard agreed by the Maintenance Forum and used in the procurement of new contractors.  Universal housing system accurately tracking voids progression.  Contractor performance on voids monitored against target,  Robust reporting framework in place and reported to stakeholders	(19) No evidence of void turnaround times or KPIs supplied	Documents attached on evidence return and fully explained <ul style="list-style-type: none"> <li><a href="#">KPIs</a> – demonstrating implementation of group target &amp; monitoring of void turn around times and repair targets and improved performance. .</li> <li><a href="#">Maintenance forum minutes</a> – demonstrating resident involvement in standard setting.</li> <li><a href="#">Reporting framework</a> – demonstrating improved record keeping, monitoring and reporting cycle.</li> <li><a href="#">Newsletter and Board minutes</a> - demonstrating reporting and monitoring of performance against target.</li> <li><a href="#">IT screen shot</a> - demonstrating IT data available and monitoring system/ data reported to residents and board.</li> </ul>	Response to TSA comments and additional questions raised on the original return  (19) Void turnaround times and KPIs - Void turnaround times are monitored and reported to the Board and residents via <a href="#">KPI reports</a> . - Void works are now being monitored by Property Services in their monthly performance meetings with contractors – a <a href="#">sample report is attached which shows Island Homes voids works completed in 2009</a> (NB: none were completed in March). - <a href="#">Also attached</a> is the guidance for front-line staff to enter these works on the system. - See <a href="#">the list of performance indicators on which OHG contractors, including Island Homes contractors</a> , are being monitored. Prior to the monthly meetings, exception lists are produced (containing works completed late, appointments missed etc) and contractors are asked to explain why they failed to meet targets. Please note that this is a draft list and minor changes may be made to this list. - A <a href="#">void standards specification</a> has been produced, see <a href="#">minutes of Barkantine Management Group meeting</a> that show evidence of resident consultation.

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<b>R3. Island Homes should improve its approach to stock investment, repairs and gas servicing by:</b>	<p>ensuring that all possible actions are taken to secure access to properties to service gas appliances.</p> <p>A number of units without a gas cert, in some cases no information on when the last service was carried out, legal action being pursued to gain access.</p>	20/12/2008	<p>20/11/08</p> <p>Ongoing</p> <p>Ongoing</p> <p>20/04/09</p>	<p>Embed Group gas servicing procedure, implementing monitoring process for access and legal action.</p> <p>Monitor programme for gas servicing to ensure accurate information is available for all units.</p> <p>For properties without a CP12 implement enforcement action to gain entry and monitor at board level.</p> <p>Group integration plan to Increase list of contractors available for gas servicing on the Island to fill resource gaps of current contractor.</p>	<p>Robust gas servicing procedure in place.</p> <p>Accurate tracking of works increased number of valid CP12s in place.</p> <p>Action taken to gain entry to properties without valid gas servicing certificate monitored</p> <p>Increased contractor capacity to deliver service.</p>	<p>(20) AC regarded this as an immediate priority. Evidence has been supplied that the issue is being addressed at board level, however, statistics supplied for non-compliant properties appears to have deteriorated during Q1 of 2009.</p>	<p>Documents attached on evidence return and fully explained</p> <ul style="list-style-type: none"> <li><a href="#">Gas serving procedure</a> - demonstrating tracking process.</li> <li><a href="#">KPI stats</a> - demonstrating improved monitoring of service and monitoring of units non compliant</li> <li><a href="#">Maintenance Panel meeting minutes</a> - demonstrating monitoring and approval of additional gas contractors.</li> <li><a href="#">Contractor list</a> - demonstrating completion of integration plans and an increase in contractors available to carry out gas servicing.</li> </ul> <p>Gas Compliance for Q 3 98% &amp; Q4 97.7% this is a dip of 0.03%. We have robust procedures in place to monitor this area and are taking action to improve this position in line with our procedures. If we can provide you with any further evidence to support this please let me know.</p>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(20) Gas Servicing Procedure</p> <p>- Gas servicing has admittedly suffered from the change in contractor, and we have achieved only 96.7% compliance for the end of April (see the <a href="#">KPI report</a>).</p> <p>- Following fortnightly meetings and daily emails chasing for information and progress it was not until 13 May that the Southern Area Director stepped in and advised us that no forward planning had been done on the contract meaning that appointment letters were not sent to many of the properties that were due to be serviced. This lack of appointments and information made it impossible for us to commence with the legal proceedings but we are picking this up now to remedy the issue as soon as possible.</p> <p>- We have expressed our disappointment with performance during the first 6 weeks of the contract have gone and the contractor has admitted responsibility. An <a href="#">action plan</a> has been agreed which is being monitored on the contractor's side by a director. We have been assured that compliance will hit 98% again within a month and improvements will be made following that.</p> <p>- See <a href="#">attached</a> for details of resident profiling information.</p>

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<b>R4. Improve the management of rent and service recovery by:</b>	<p>ensuring that a rent recovery policy with procedures specifically applicable to Island Homes is in place and effectively implemented;</p> <p>Rent recovery within island homes was identified as an area of significant weakness. Poor procedures and management training has hindered the recover process. No Procedure in place to reflect IH transfer promise.</p>	20/03/2009	20/11/08	Group Income Collection Policy excludes use of ground 8 for IH residents. (please note this is the only difference in policy between the RSLs)	Group Income Policy reflects transfer promises made to Island Homes residents.	(21) We need to see more evidence of how recovery policies and procedures specific to IH have been adopted at board level and how they are being implemented, and how residents are being consulted.	Documents attached on evidence return and fully explained <ul style="list-style-type: none"> <li>Group income collection procedure - demonstrating that transfer promised have been included in Group procedures.</li> <li>Income Collection Structure chart- demonstrating centralisation of income team.</li> <li>Board report – demonstrating board approval of rent increases.</li> <li>Confirmation information demonstrating transfer of payment process to Bacs.</li> <li>Money Matters course analysis - demonstrating impact on arrears.</li> <li>Letting pack information – demonstrating action taken to emphasis importance of paying rent and lettings stage.</li> <li>Promotional information - demonstrating help available for residents is displayed in a user friendly format.</li> <li>Resident newsletters -demonstrating performance reported to residents</li> <li>Training programme and attendance - demonstrating training programme in completion.</li> </ul>	<b>Response to TSA comments and additional questions raised on the original return</b>  (21) Board adoption of recovery policies & procedures - Through the inter-group agreement, which was approved by the Board in June, we have adopted groupwide policies and procedures. The only exception to the arrears policy for IH is that ground 8 does not apply in possession cases. - See the attached Group Income Policy with the <a href="#">ground 8 exclusion policy</a> highlighted. - The Income Policy was consulted with IH residents at a focus group in July 2008 during the development stage of the policy.  <b>Response to general questions raised on the evidence return</b> - We have a certain amount of information about our residents through census surveys, such as the main languages spoken by our residents. As 40% are Bengali all letters are translated into Bengali and sent to Bengali speakers. We are also working to identify other special interest groups so that they can be targeted. Residents are regularly reminded that information can be provided in other formats and languages as required. - Residents across the Group who are falling into arrears are being targeted for debt counselling and are invited to attend our Money Matters course. Our <a href="#">analysis</a> shows that residents who have attended the course maintain a good payment history and approx 10% have reduced arrears. - Group income collection and arrears targets have been agreed and are listed on <a href="#">the KPI report</a> . - All IH residents were invited to attend the Money Matters courses via letters on 7 and 29 April as well as on the Group website. The first courses are being held every Thursday 11am - 3pm from 9 to 30 June and to date 7 IH residents have enrolled. See the <a href="#">promotional flyer produced for the course and the letter inviting residents to attend</a> that was sent on 7 April 09. - As we obtain more profiling data this will be analysed and used to target specific groups e.g. unemployed people will be invited to join our Work Matters register and offered help and support with looking for employment and training opportunities, families with children will be kept up to date with projects and initiatives for children and young people.
			23/02/09	Centralise income collection functions with Group's income collection team and transfer staff to SWS.	Successful transfer of Income Collection Team to centralised team based at SWS.			
			04/03/09	Review Island Homes rent setting policy and agree annual % rent increase with governing body.	Annual Rent % increase and rent setting policy agreed by Board			
			23/02/09	Review Housing Benefits payment process with a view to transferring to BACS payments, set current tenant arrears target and collection rates.	HB paid via electronic banking system.			
			20/03/09	Promote Group's Money Matters courses and work with residents to provide better debt management information, effective money management, budgeting, opening a bank account and increasing financial awareness of the risk of falling into arrears.	Structures in place to support residents in debt, helping them to obtain advice and counselling. Structures also helping to maximise income.			
			30/04/09	Review lettings process to ensure importance of paying rent on time is highlighted at start of tenancy.	Improved lettings information packs in place.			
			20/11/08	Review literature and ensure letters are customer friendly and in the appropriate language and format.	Improved literature in place.			
			ongoing	Monitor and report performance against KPIs to residents.	KPI targets in place, monitored and reported			
20/11/09	Implement training programme for staff managing arrears.	Staff training programme delivered.						
<b>R4. Improve the management of rent and service recovery by:</b>	<p>ensuring that the use of IT systems to identify and analyse arrears is maximised;</p> <p>The IT system is not used to its full potential. Staff have not been trained to use the full range of functions.</p>	20/03/2009	20/3/09	Meet Group integration targets and harmonising plans for arrears IT systems. Roll out system on target.	Universal Housing system arrears monitoring launched on time and to target.	(22) Little information provided on UH or training staff have received on it. We need more information about how OHG and IH are utilising IT in this area	Documents attached on evidence return and fully explained <ul style="list-style-type: none"> <li>Training programme- demonstrating that all staff have been trained (and are therefore using the system).</li> <li>User manual – demonstrating staff have access to IT process.</li> <li>System report – showing a snapshot of how the service users are using the system and monitors arrears.</li> </ul>	<b>Response to TSA comments and additional questions raised on the original return</b>  (22) Universal Housing (UH) - The Universal Housing system provides a number of arrears actions, stages and letters which are used by the Income Collection Team. These are automatically generated by the system but can be over-ridden by users. - A problem that currently exists is that it can be difficult to separate out Housing Benefit arrears from tenant arrears. We are therefore moving to a split account system during this financial year, which will enable to system to be used far more effectively, taking less time for Income Officers to work on accounts. In the meantime, we have a <a href="#">report</a> showing residents who have made no tenant contributions for six weeks (attached) and their arrears level to assist us in targeting arrears. - Reporting requirements are specified by the Income Collection Team and produced by the Business Solutions Team.
			30/12/08	Implement a full training programme for all staff, evaluate and test understanding of system.	Training programme implemented and understanding tested by monitored of activity.			
			20/03/09	Produce a user manual for all the system users	Procedure manual produced and in place for all staff.			
			20/03/09	Staff training and performance monitored against service standards.	User manual in place			

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<b>R4. Improve the management of rent and service charge recovery by:</b>	ensuring that all steps are taken to recover former tenant arrears at the earliest possible stage and that there is a clear write-off policy;  Lack of focus, clarity required on who is responsible for recovering arrears. FTAs recover policy is limited. No specialist software for tracing former tenants.	20/03/2009	23/02/09  20/02/08  30/01/09  30/03/09  ongoing	Achieve Group integration plans, restructure staff team and transfer team and reporting requirements to Group's Income Collection Team  Place transferred staff onto OHG job descriptions which include the collection of former tenant debt.  Update FTA procedure to ensure the stages for debt transfer to collection agencies is clear.  Ensure annual write off process for bad debt includes board involvement.  Review the performance of the Group's debt recovery agencies by monitoring financial return.	Staff and FTA recovery process transferred to Group's income collection team on target.  New job description issued former tenant debt monitored and reported.  FTA procedure provides clarity on level of debt to be transferred collection agencies is clear.  Write offs reported the board on a annual basis.  Bad debt management procedure in place and monitored.	(23) What has been done to address the AC's concerns regarding FTAs?  (24) How are income officers using the 'FTA Matrix'?  (25) How are referrals to Deanem Collection Agency decided? (26) What is the outcome of Deanem's recovery rate?	Documents attached on evidence return and fully explained  <ul style="list-style-type: none"> <li>Structure chart - demonstrating that staff have been transferred to Groups income collection team.</li> <li>Income collection officers Job description- demonstrating inclusion of monitoring former tenant debt.</li> <li>FTA procedure and user matrix - demonstrating that staff have clear guidance on the collection process and a procedure in place to guide staff on when to refer debt to a recovery agency.</li> <li>KPIs for FTAs - demonstrating monitoring and adherence to FTA policy and debt reduction.</li> <li>Board minutes- demonstrating board involvement in the process.</li> <li>Analysis of collection rates on cases transferred to collection agencies - demonstrating monitoring of external agencies performance. outputs.</li> </ul>	Response to TSA comments and additional questions raised on the original return  (23) Action taken to address the ACs concerns is shown in Column 8.  (24) Use of FTA Matrix by Income Officers - The former tenant arrears policy and procedure were revised in January 2009. The procedure is attached, which provides details how the matrix is used. Write-offs have been approved by the Board and are now reflected on the KPI report.  (25) Referrals to Deanem Collection Agency - Referrals to the Deanem collection agency are made for cases over £500 where we do not have forwarding addresses.  (26) Deanem's recovery rate - Approximately 15 cases have been referred, of which three have been traced and one has been paid. - In our work plan for this year we plan to review their effectiveness and see what else in on the market in this field. To do this we will look at other HA's collection rates and will employ another collection agency to see which is the most effective.
<b>R4. Improve the management of rent and service charge recovery by:</b>	ensuring that leaseholder service charge bills are based on actual costs and contain all statutorily required information;  Estimated service charges costs are sent out annually, and percentage uplift is applied the following year, service charges should be based on actual expenditure.	20/03/2009	30/11/08  20/11/08  20/11/09  01/04/09	Undertake an audit of leaseholder service charges and allocated service charge expenditure to blocks.  Restrict the coding of sundry invoices to key staff. Transfer the coding of sundry debtors to the Millwall office.  Introduce a structured financial matrix to ensure clear coding and authorisation of expenditure is in place.  Implement a procedure to set estimated bills in April and actuals in September when annual accounts are closed and full expenditure for previous year is known.	Service charge expenditure allocated to block accounts for leaseholders..  Sundry debtor processing and coding transferred to the Millwall office.  Coding and authorisation of invoices restricted. Staff are have clarity on payment process for sundry accounts.  Process in place to assess actual service charge expenditure and communicate with residents.	Board minutes (11.2.09) show Steve Schollar from OHG is addressing service charges and is appointing an independent arbitrator for determining estimates  (27) We need evidence that service charges are now being calculated on an 'actual cost estimate' basis.	Documents attached on evidence return and fully explained  <ul style="list-style-type: none"> <li>Example of a block account - demonstrating that processes are in place to apportion actual costs accurately to block accounts.</li> <li>Staff structure chart- demonstrating staff structure in place for invoice procurement.</li> <li>Financial matrix - demonstrating the coding and authorising process.</li> <li>Service charge procedure - demonstrating a process is in place to provide and charge actual costs to leaseholders.</li> <li>Leaseholder Service charge bill - demonstrating charges billed.</li> </ul>	Response to TSA comments and additional questions raised on the original return  (27) Calculation of Service Charges - The estimates for this year were based again on an uplift of the last year's estimated budget. This was because actual costs under some service charge headings were unavailable from the finance database due to miscoding of invoices. - This is a considerable oversight, but the adoption of a groupwide coding structure and better budget monitoring will ensure that this does not happen again and that actual accounts can be produces in September. - Group integration plans were delayed and as a result of the restructure of the Leasehold Team, which will be taking place between June and Sept 09. This area continues to be covered by centralised teams at present.  Response to general questions raised - The Resident Friend will be required to engage with leaseholders in a variety of ways, including attending leaseholder forum meetings, to once again dispel any confusion and misunderstanding around the £10k capping policy. - All Leaseholder policies and procedures do adhere with legislation. The policies and procedures have been attached with a statement from the Leasehold Manager to support that they meet the requirements Leasehold Services are incorporated in the Performance Management Framework and will be subject to an Internal Service Review annually, the Service will also be subject to all aspects of the framework including the reporting cycle, Service Improvement Plans and BenchMarking. See the PMF implementation strategy for more information on the implementation plan.

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<b>R4. Improve the management of rent and service charge recovery by:</b>	<p>ensuring that the full range of recovery actions are implemented to recover leaseholder service charge arrears; and</p> <p>Leasehold cases have not been taken to the leasehold valuation tribunal due to uncertainty over the actual cost of services owned to the association from LBTH. Implementing new procedures and training for leasehold staff.</p>	20/03/2009	<p>30/12/08</p> <p>20/07/09</p> <p>20/03/09</p> <p>27/02/09</p> <p>27/02/09</p> <p>30/07/09</p>	<p>Agree with London Borough of Tower Hamlets a deed of variation for the recovery of leaseholder arrears pre transfer and credits accrued and owed to IH post-transfer.</p> <p>Recover last quarter payments for 05-06 from London Borough of Tower Hamlets (LBTH). <b>This target has slipped due to the requirement for the LA to assess credits owed.</b></p> <p>Set and monitor recovery targets for leaseholder arrears.</p> <p>Review and improve all leaseholder policies. Consult on and agree procedures with leaseholders</p> <p>Carry out training for all leasehold staff to ensure skill gaps are filled. Evaluate training provided to ensure knowledge of leaseholder legislation and organisational procedures is understood.</p> <p>Set up a dedicated leaseholder team to deliver Group Integration Plans and improve management and monitoring of service to leaseholders</p>	<p>Draft Deed of Variation agreed.</p> <p>Regular partnership meeting in place. Deadline for assessment and repayment agreed</p> <p>Arrears recovery targets in place and monitored..</p> <p>Leaseholder policies reviewed, consulted on and implemented.</p> <p>Staff training completed and evaluated.</p> <p>Delayed until July</p>	<p>(28) We need more information about the policies and practices put in place by Steve Schollar in regard to leaseholder service charges and how recovery targets are being set and monitored.</p> <p>(29) What staff training has taken place?</p> <p>(30) We need more clarity on how leaseholder policies are being implemented.</p>	<p>Documents attached on evidence return and fully explained</p> <ul style="list-style-type: none"> <li><a href="#">Draft deed of variation</a> - demonstrating progress towards separating leaseholder arrears.</li> <li><a href="#">Correspondence with LBTH</a> - demonstrating action taken to recover payments.</li> <li><a href="#">Recent email to LBTH</a> - demonstrating request for payment.</li> <li><a href="#">KPIs</a> - demonstrating arrears targets set.</li> <li><a href="#">Reporting framework</a> - demonstrating how targets are monitored and reported</li> <li><a href="#">Leaseholder procedures</a> - demonstrating leaseholder procedures in place.</li> <li><a href="#">Leasehold training evaluation</a> - demonstrating training has occurred and is understood by staff.</li> <li><a href="#">Proposed leaseholder structure chart</a> - demonstrating proposed new centralised structure to be</li> </ul> <p>Restructure of leaseholder team delayed due to challenges on disciplinary action</p>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(28) Policies and Procedures - The policies and procedures put in place by Steve Schollar are <a href="#">attached</a>. Recovery targets are shown in the KPI reports.</p> <p>(29) Staff Training - A full programme of training has been delivered to the Leasehold Management Team between March 2008 and February 2009. See attached <a href="#">analysis of evaluation forms</a> completed by participants on the courses.</p> <p>(30) Implementation of Leaseholder Policies - The leasehold procedures were reviewed with staff and residents. A full training package was implemented. Performance is monitored through the PFM process and monthly KPIs.</p>

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<b>R4. Improve the management of rent and service charge recovery by:</b>	ensuring that there is clear information available for leaseholders about planned works.  Information sent about planned works is unclear, plans for works have not been finalised.	20/03/2009	20//06/09  20/02/09  20/05/09  31/12/2010  30/09/09  20/03/09  20/05/09  20/08/09  30/09/09	Replace draft leaseholder handbook with professional printed handbook and publish.  Review consultation and communications strategy with development team for the promotion of major works programmes. Obtain Board approval of consultation and communication process.  Tender major works contract in line with European legislation which incorporates VFM principals. Analyse tenders and award contract.  Deliver external works programme to target and budget.  Issue section 20 notices for planned works programme.  Review transfer promises documentation and establish accurate position on major works capping procedure. Respond to leaseholder representatives.  Appoint an external arbitrator to assess on cases in conflict.  Working with the IT department to agree a process for the monitoring and collection of future major works payments. Assess how local RSLs deliver payment plans for major works costs in the borough and apply best practice.  Send out payment details and hardship application process with major works bills in September	Leaseholder hand book includes residents' views publication date set.  Major works communication and consultation strategy agreed by Board.  Contract tendered in line with EU legislation. External consultant appointed to appraise and advise on tenders.  Project plan in place to ensure programme is delivered to target.  Section 20 notices issued.  Transfer documentation reviewed and leaseholder reps advised that the £10k capping is for hardship cases only.  External arbitrator appointed.  Project team in place to review how local service providers manage repayment cycles for leaseholder major works bills.  Target date set for the dispatch of bills and hardship application process.	(31) The IH Communications Strategy (25.11.08) only mentions S20 statutory notification process for leaseholder.  (32) A Board report from 29.1.09 states: There is a widespread belief amongst leaseholders that their liability for recharge under Section 20 is limited to £10K. because of reference to a 'guarantee' in one of the offer documents preceding the transfer. The IH opinion is that the offer document was superseded by the terms of the transfer and the £10K is only available in case of hardship". How is this being communicated?	Documents attached on evidence return and fully explained  <ul style="list-style-type: none"> <li>Leaseholder handbook - demonstrating it is fit for purpose.</li> <li>Consultation and communication process for major works - demonstrating that there are clear processes in place.</li> <li>Board minutes - demonstrating Board approval of consultation plan.</li> <li>Tender letter - demonstrating that planned works have been tendered.</li> <li>Letter to residents 14<sup>th</sup> Jan notifying of proposed works - demonstrating communication on works programme.</li> <li>EU tendering summary - demonstrating that the process includes VFM principals.</li> <li>Delivery plan (paper document) - demonstrating targets for delivery of works programme.</li> <li>Section 20 notice - demonstrating adherence to legislation.</li> <li>Minutes of leaseholder meeting - demonstrating communication on 10K capping issue</li> <li>Appointment of external arbitrator - Catholic Housing Aid Society.</li> <li>Project team minutes - demonstrating action taken to achieve best practice for major works payments.</li> </ul>	Response to TSA comments and additional questions raised on the original return  (31) IH Communications Strategy - An IH Communications Strategy has been drafted and approved by the Board. It will be going out to consultation with the IH Regional Consumer Panel, the four IH TRA Chairs and the database of involved residents. Once consultation is completed, feedback will be used to draft and implement a policy. See <a href="#">draft Communication Strategy and consultation plan</a> .  (32) Clarification over 10k capping issues - clarification of £10k capping issue was provided with a letter sent to all IH leaseholder in Jan 09 advising them of the Major Works planned for their estates. - Leaseholders have been notified of Major Works programme and the expected impact and costs to them. See <a href="#">the letter sent to residents on 14 Jan</a> to notify them of the proposed works, as well as appendices B and C. - The external works programme was drawn up in adherence with accepted OJEU tendering processes using VFM principles. See the <a href="#">Procurement Report</a> produced for the Executive Team meeting in Jan 09.  Response to general questions raised - Consultation on the Leaseholders Handbook was conducted with the Glengall and St John's Leaseholders Association as well as with the Group Leaseholder Forum. Leaseholders from the Group's three RSLs were invited to join this Forum however to date there are no IH representatives. <a href="#">See consultation plan</a> . - The Leaseholder Handbook finalised, with a target completion date for circulation of the of 19 June - An electronic version is also be available via our website.

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<b>R5. Improve the approach to achieving value for money by:</b>	<p>ensuring that the costs and quality of all areas of service delivery are assessed and benchmarked against others;</p> <p>No comprehensive asset management plan and limited benchmarking of costs and quality of various services. Lack of benchmarking and VFM for responsive repairs, ground maintenance, handymen, caretaking, and service charge administration and ASB service.</p>	20/05/2009	<p>20/05/09</p> <p>20/03/09</p> <p>01/04/09</p> <p>11/02/09</p> <p>30/07/09</p> <p>31/12/09</p> <p>ongoing</p> <p>20/02/09</p> <p>27/02/09</p> <p>30/09/08</p>	<p>Working with regulators review current asset management plan which incorporates IH assets and ensure comprehensive.</p> <p>Use feedback from staff and residents to inform procurement of new maintenance contractors.</p> <p>Appoint new contractors to deliver planned and reactive repairs service.</p> <p>Set Group KPIs, benchmark against peer group and report to residents.</p> <p>Develop a VFM framework.</p> <p>Agree VFM framework with residents and roll out across the Group.</p> <p>Benchmark services using external assessors such as PIE and QHS.</p> <p>Restructure handyman service and monitor work and cost in line with monitoring for external contractors to assess cost and value for money.</p> <p>Administer repairs for ASB via caretaking and handyman service.</p> <p>Working with the TRAs implement a service review of the caretaking service to establish costs, quality and VFM.</p>	<p>Comprehensive Asset Management Plan in place and agreed with regulator.</p> <p>Residents involved in procurement of external contractors.</p> <p>New contractors in place and best value principals applied.</p> <p>KPIs in place and benchmarked against peer group, residents receiving regular reports of performance.</p> <p>VFM framework in development and targeted.</p> <p>Improved service performance which is assessed against peer group.</p> <p>Process in place to assess cost of handyman service.</p> <p>Caretaking service review plans targeted.</p> <p>Service delivery focused on estate inspections and ASB issues.</p>	<p>(33) We need to see more evidence of benchmarking and BV principles being applied and embedded.</p> <p>(34) Who is in the peer group?</p>	<p>Documents attached on evidence return and fully explained</p> <ul style="list-style-type: none"> <li>Maintenance budget summary sheet and service delivery benchmarking demonstrating internal benchmarking of day to day and planned maintenance costs per unit. This will be used to benchmark against our peer groups .</li> <li>Asset management plan – demonstrating a comprehensive plan is in place. See comments and comprehensive assets</li> <li>Maintenance Forum minutes - demonstrating involvement of residents in the procurement and selection process.</li> <li>Procurement report - demonstrating OJEU compliance and VFM principals.</li> <li>PIE group report- demonstrating membership, peer groups and benchmarking on responsive repairs.</li> <li>Minutes of CIG group - demonstrating targets set for the formation of a VFM framework.</li> <li>Handy man ordering and monitoring structure - demonstrating monitoring in line with external contractors.</li> <li>Handyman order – demonstrating administration of ASB repairs.</li> <li>Timetable for service reviews.- demonstrating time frame for caretaking service review.</li> </ul> <p>Service charge administration explained on previous recommendation.</p>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(33 &amp; 34) Benchmarking and Best Value Principles</p> <ul style="list-style-type: none"> <li>Attached is a BenchMarking report from the <a href="#">PIE group</a> (Performance Information Enabling Club). This report includes a <a href="#">list of members</a>, it shows regular benchmarking performance information across a suite of KPI's, including responsive repairs standards.</li> <li>VFM framework is still under development, a KLOE gap analysis exercise has been completed and an <a href="#">action plan</a> developed. The actions have been attached, as resources have just been agreed by the Executive Team and the project team will be meeting soon to determine timescales against the action plan.</li> <li>The Group procurement exercise was completed. This was OJEU compliant and as such was conducted along Vfm principles. The <a href="#">procurement report and lift procurement report</a> are attached.</li> <li>As a result of the <a href="#">procurement report</a> the contractor structure is changing across the Group so that they work by area rather than by RSL bringing improved efficiencies and Vfm.</li> <li>The tender process ensures that the Group is achieving the most competitive, value for money rates.</li> <li>As a result of the procurement process, new contractors were selected in April. Customer satisfaction will be assessed in September, once the contractor has been in place for 6 months, to ensure that residents are satisfied with the service they are receiving and to identify any areas for improvement.</li> </ul>

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<b>R5. Improve the approach to achieving value for money by:</b>	ensuring that responsive repairs are correctly prioritised;  Prioritisation of repairs is inefficient, a high number of emergency and urgent repairs means operatives are not effectively prioritising their work. No more than 30% of repairs should be emergency and urgent.	20/05/2009	27/02/09 20/05/09 27/02/09 20/04/09 27/02/09 27/02/09 27/02/09 20/05/09	Transfer repair ordering to CCC to ensure consistent ordering in line with procedures.  Carry out an analysis of orders and the prioritisation awarded to establish reasons of high urgent and non urgent repairs.  Restructure ordering process for the handyman team to enable monitoring against key indicators.  Promote handyman role to all residents to increase take up of service and provide a reactive service repair service which can perform to tighter targets.  Introduce a responsive service whereby handyperson carries out all repairs/work flagged up in estate inspections.  Ensure call centre staff are aware of the different repair priorities for Island Homes and the handyman service.  Compare responsive repairs standards with other group subsidiaries to ensure group standards are achieved, consistent and meets customer expectations.  KPIs to be bench marked internally to assess consistency adherence to policy and externally via QHS assessments to assess performance against peer group.	Repair ordering successfully transferred to CCC.  Analysis complete and full understanding gained of why orders for urgent and non urgent repairs are high.  Handyman service delivering a customer-focussed service that has effective monitoring in place.  Handyman service fully promoted to residents and improved response to repairs being noted on estate inspections.  Call Centre delivering island Homes repair priorities agreed at stock transfer.  Consistent Group performance and regular reporting of performance against internal RSLs and the external peer group.  KPIs benchmarked and performance assessed by external consultants.	(35) How are urgent and emergency repairs being prioritised?  (36) We need to see how the repairs service is being reviewed for best value and whether current prioritisation of repairs is justified.	Documents attached on evidence return and fully explained  <ul style="list-style-type: none"> <li>Confirmation of launch of CCC and transfer of staff- provided on previous recommendation.</li> <li><a href="#">Repair priorities for IH and industry standards how we assess summary</a> - demonstrating reasons for high urgent and non urgent repairs statistics and explaining how monitoring has been adjusted to meet the differing reporting requirements.</li> <li><a href="#">Newsletter</a> – promoting handyman service.</li> <li><a href="#">Estate inspection maintenance report and completion dates</a> demonstrating handyman works linked to ASB and estate inspections.</li> <li><a href="#">KPI reports and QHS report</a> - demonstrating performance and benchmarking.</li> <li><a href="#">Repair category guidance used by CCC staff</a> - demonstrating adherence to transfer promises on repair priorities.</li> </ul>	<b>Response to TSA comments and additional questions raised on the original return</b>  (35) <b>Prioritisation of urgent &amp; emergency repairs</b> - IH has <a href="#">its own repairs priorities</a> which were agreed at stock transfer, and these are loaded heavily into the Emergency and Urgent categories compared to the rest of the Group's. We plan to review the categories this year (target completion March 2010), so that we can go into the new 2010/11 contracts with one set of priorities for the Group. - An issue that emerged following a data review was that it was common for staff to 'promote' the priority of repairs if tenants complained. This has now stopped: before November, routine repairs accounted for only 37% of all repairs, whereas since November they have accounted for 51%. This is evident from the data in <a href="#">KPI report</a>  (36) <b>Value for Money review of repairs service</b> - The issue of VfM in terms of procurement for repairs was addressed in the previous section.
<b>R5. Improve the approach to achieving value for money by:</b>	ensuring that any monies due from the London Borough of Tower Hamlets for aids and adaptation work and leasehold service charges are recovered; and  Financial management of Aids and adaptations is weak, A&A works have not been invoiced to the LBTH, negotiation on A&A grant level still to be resolved.	20/05/2009	20/02/09 20/02/09 30/12/09 ongoing	Introduce Aids and Adaptations Procedure  Recover outstanding aids and adaptations money from London Borough of Tower Hamlets.  Introduce post inspection of A&A works and customer satisfaction reviews, analyse results and feed improvement requirements into service improvement plans.  Where possible use alternative contractors to carry out A&A works in order to achieve value for money and to challenge the costs of recommended contractors with the local authority.	Aids and Adaptations Procedure in place.  Outstanding Aids and Adaptations money fully recovered from the borough.  100% Post inspection records for Aids and Adaptation works, improved Customer satisfaction demonstrating high satisfaction with A&A service.  Alternative work estimates obtained before appointment of contractors on new works.	(37) We need to see more details of relationship with LBTH over leaseholder charges and aids and adaptations.  (Leaseholder information detailed on previous sheets.)	Documents attached on evidence return and fully explained  <ul style="list-style-type: none"> <li><a href="#">Draft A&amp;A Procedure and Process map</a> – demonstrating a procedure and current process in place to deliver A&amp;A works.</li> <li><a href="#">Schedule of A&amp;A works</a> – demonstrating structured approach to monitoring and recording works.</li> <li><a href="#">Aids and Adaptations cost recovery spreadsheet</a> - demonstrating cost known and total amount recovered.</li> <li><a href="#">Satisfaction reports</a> - demonstrating monitoring and customer satisfaction with works.</li> <li><a href="#">Grant approval for A&amp;A works</a> - demonstrating process in place for works approval.</li> <li><a href="#">Examples of estimates received from alternative contractors.</a> – demonstrating work awarded to contractor demonstrating the best VfM.</li> </ul>	<b>Response to TSA comments and additional questions raised on the original return</b>  (37) <b>Relationship with LBTH regarding monies owed</b> - We are working closely with LBTH to recover outstanding charges relating to leaseholder charges from the last quarter of 2005/06. See <a href="#">the latest email</a> sent to LBTH on 21 April 09 on this matter. We are expecting to receive the funds by end of May. -All monies owed for aids and adaptations work have been received to date. - We have an established process in place with LBTH for aids and adaptations work that is working well, see our <a href="#">Process Mapping document</a> , <a href="#">the schedule of aids and adaptations works planned</a> , <a href="#">the draft IH Aids and Adaptations Policy</a> and an example of a <a href="#">grant approval for Aids and Adaptations work</a>  <b>Response to general questions raised</b>  - Data obtained from evaluating customer satisfaction returns is used to assess performance of contractors and to highlight any areas of weakness which are discussed at monthly meetings with contractors. - See examples of <a href="#">Aids and Adaptations Satisfaction Reports</a> which are monitored internally by operational staff but not reported to the Board.

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<b>R5. Improve the approach to achieving value for money by:</b>	<p>ensuring that all service level agreements and 'traded services' are periodically reviewed to ensure they are delivering value for money.</p> <p>Of the 8 traded services transferred at stock transfer, 3 remain and require assessment for VFM.</p>	20/05/2009	<p>30/12/09</p> <p>27/02/09</p> <p>01/04/09</p> <p>27/02/09</p>	<p>Conclude property services and asset management procurement review which includes all IH traded services for asset management.</p> <p>Deliver Group integration plans and transfer services to CCC before the introduction of new contractors.</p> <p>Serve notice on LBTH and transfer payroll service to ADP.</p> <p>Legal services agreement has expired, continue to use the legal service of LBTH for RTB cases only. Obtain legal services from the groups list of legal service providers.</p>	<p>Procurement review complete and services including Out of hours transferred..</p> <p>Group integration plans delivered to target.</p> <p>Payroll transferred on 1<sup>st</sup> April 09.</p> <p>Approved legal service providers in place.</p>	<p>(38) We need to see more information about Vfm review outcomes for traded services (39) What is the status of the review of the legal services SLA? (especially as IH is looking at taking legal action to reclaim Aids and Adaptation monies from LBTH.)</p>	<p>Documents attached on evidence return and fully explained</p> <ul style="list-style-type: none"> <li>• <a href="#">Procurement review</a> - demonstrating full review of services and VFM.</li> <li>• <a href="#">Group integration targets</a> - demonstrating approved structure and target dates</li> <li>• Payroll termination notice and ADP contract – demonstrated the termination of a service and the transfer to a new provider.</li> <li>• <a href="#">List of legal advisors and costs</a> - demonstrating benefits of economies of scale and legal contractors available.</li> </ul>	<p>Response to TSA comments and additional questions raised on the original return</p> <p>(38) Value for Money review outcomes for traded services</p> <p>- All traded services were reviewed to evaluate their efficiency and value for money. The payroll service previously provided by LBTH was found to be inefficient and costly therefore this function was brought in-house and is now benefitting from economies of scale. The out of hours repairs service is also being brought in-house for the same reasons.</p> <p>(39) Review of legal services SLA</p> <p>- Right to Buy application process is still administered by LBTH, all other legal services are provided centrally to benefit from economies of scale. Arrears Officers self represent in court.</p> <p>- A review of the contractor for drain-jetting services at IH showed that they were offering good value for money with prices that were comparable to contractors for the Group's other RSLs. Resident satisfaction with the service was also high and the decision was therefore taken to retain this contractor.</p> <p>- No legal action is being taken out against the Borough.</p>

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<b>R6. Improve performance management and resident involvement by:</b>	<p>ensuring that performance information (including that required by the Housing Corporation) is accurately compiled and is regularly reported to managers, Board and residents;</p> <p>Production of performance information has been poor until recently. Steps have been taken recently to ensure that performance in most service areas is reliably, monitored and reported. The performance management of staff has been weak until recently Areas not monitored. Performance management of staff was weak but under development, telephone answering, leasehold management and RTB</p>	20/05/2009	<p>01/10/09</p> <p>Ongoing</p> <p>01/11/09</p> <p>01/03/09</p> <p>20/02/09</p> <p>20/05/09</p>	<p>A. Implement action plan developed from the house mark audit of KPIs. Central policy and performance team to test KPI compliance and regulatory requirements every six months. External consultants House Mark to test annually.</p> <p>B. Report performance to Board and residents quarterly, report performance via web site, newsletters consumer panels and resident involvement database.</p> <p>Develop and agree a Performance reporting cycle (PRC) for Island Homes to ensure reporting is systematically monitored and reported.</p> <p>Fully embed a performance management culture, carry out a full review of job descriptions transferred from LBTH to establish fit for purpose. Implement staff restructure plans and issue new job descriptions. Implement training requirements for new roles and evaluate to assess its effectiveness and identify any future training needs.</p> <p>C. Implement new telephone system to enable monitoring and reporting of telephone calls. Set and monitor targets.</p> <p>D. Improve resident consultation by introducing a communication strategy and performance consultation plan.</p>	<p>House Mark recommendations implemented, KPIs compliant and regularly monitored</p> <p>Performance reported to Board and residents on a regular basis.</p> <p>PRC developed and performance monitored and reported systematically.</p> <p>Staff re-structure complete and staff clear on roles and responsibilities. Training plan implemented and evaluated.</p> <p>Performance targets set. New telephone system in place and monitored and report.</p> <p>Communication strategy approved and performance consultation plan developed.</p>	<p>(40) We need to see more information about resident and stakeholder input into KPIs and KPI reporting to residents and the Board.</p> <p>(41) We need more clarity on how regulatory KPIs are being recorded accurately and reported to residents and to the Board.</p>	<p>Documents attached on evidence return and fully explained</p> <ul style="list-style-type: none"> <li>House Mark action plan - demonstrating KPI weakness identified and action taken to ensure compliance with regulatory requirements.</li> <li>Board reports - demonstrating performance monitoring to board. See PMF for reporting cycles for residents and staff.</li> <li>Performance reporting cycle IH - demonstrating a systematic approach to monitoring and performance reporting.</li> <li>Staff structure chart - demonstrating changes made to ensure staff duties reflect service needs.</li> <li>Training evaluation form and analysis data -demonstrating that training has been delivered and evaluated.</li> <li>Telephony procedure and statistics - demonstrating implementation of new system and reporting capabilities.</li> <li>Communication strategy and plan - demonstrating structured approach to reporting performance.</li> </ul> <p><b>Additional Evidence Provided</b></p> <p>A. House Mark Validation - Summary of scores following recent validation exercise carried out by HouseMark.</p> <p>B. Performance Reporting -</p> <ul style="list-style-type: none"> <li>Board agenda and minutes demonstrate continual performance reporting to Board.</li> <li>Consumer panel minutes demonstrate Resident involvement in monitoring performance and influencing service improvements.</li> <li>Newsletters demonstrate continuous feedback to residents.</li> <li>Newsletters demonstrate continuous feedback to staff.</li> </ul> <p>C. Telephone Statistics for Customer Contact Centre - Statistics demonstrating continued performance monitoring against target for the last six months.</p> <p>D. Resident Consultation and Communication -</p> <ul style="list-style-type: none"> <li>SNI consultation demonstrates continued resident involvement in the development of improvement plans.</li> <li>IH Consultative Panels demonstrate ongoing estate-based consultation.</li> <li>Major Works Consultation demonstrating full consultation and communication on future Communal Works.</li> </ul>	<p><b>Response to TSA comments and additional questions raised on the original return</b></p> <p>(40) Resident and stakeholder input into KPIs</p> <ul style="list-style-type: none"> <li>It was not possible to consult with residents when setting the KPIs due to time constraints, however as the reports will soon be available in the new format, we have organised a focus group for Island Homes residents on 28 May to consult with them on both the service standards and the KPI's. Please see the <a href="#">Performance Consultation Plan attached</a></li> <li>KPIs are reported to residents on a quarterly basis via newsletters, quarterly to the Board in Board papers and internally at Executive Team meetings and Senior Management Team meetings.</li> </ul> <p>(41) Recording of regulatory KPIs</p> <ul style="list-style-type: none"> <li>Following last year's review of our regulatory KPIs by HouseMark, IH is being re-validated in July, following June validations for other OHG subsidiaries. We are expecting a much better outcome from the validations this time. Allocations has now been centralised (since April), and all housing staff are fully trained in the completion of CORE forms, which are validated by Allocations staff prior to entering on CORE Digital (which provides further validation).</li> <li>A new voids process is currently being agreed which ensures that voids are always listed on our database in the correct status. Deficiencies in DHS data have been addressed as referred to above and STATUS surveys are carried out by an external contractor in line with the correct methodology.</li> </ul> <p><b>Response to general questions raised on the evidence return</b></p> <ul style="list-style-type: none"> <li>An Island Homes specific training plan is been developed which offers staff the opportunity to take part in Skills for Life courses and housing related NVQs (starting mid May). We are taking a voluntary approach and inviting staff to sign up. The courses will be evaluated and if they prove useful the programme will be rolled out across the rest of the Group. See the attached example of <a href="#">an example of a training evaluation form</a> and <a href="#">an example of an analysis</a> of evaluation forms for a training course.</li> <li>A Learning Union Representative has also been identified to develop a more positive relationship. The representative was nominated by staff and has now been selected. The first meeting will take place next week.</li> <li>An employee incentive scheme has been drafted and once finalised it will be implemented and circulated to staff. Staff input is being sought from staff regarding the name of the policy. The policy will be reviewed 12 months after implementation to evaluate whether it is making a difference. See attached <a href="#">the draft employee incentive scheme</a>.</li> </ul>

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<b>R6. Improve performance management and resident involvement by:</b>	<p>ensuring that there are effective management and monitoring arrangements in place for community buildings and funded projects; and</p> <p>There are no effective management arrangements in place for community buildings. No written agreements are in place and groups do not provide IH with accounts despite charges been made to the public for some activities. Although projects may be offering valued services to the public there is no clear accountability or quality assurance.</p>	20/05/2009	20/05/09	<p><b>A. Circulated draft tenant and resident association recognition agreements. Working with IH consultative groups resolve conflict, incorporate amendments and agree implement date.</b></p> <p>Develop and circulate a template for recording membership, set a target date for completion</p> <p><b>B. Work with TRAs and community leaders to establish management arrangements in place for community activities that are taking place in community buildings and not funded by IH. [RM 1]</b></p> <p>Circulate the Group's financial audit booklet which sets out recording, reporting and monitoring requirements. Work with residents to agree reporting of outputs.</p> <p><b>C. Work with resident representatives to develop a schedule of payments for utilities i.e. gas, water, telephones broadband and stationary. Report costs on an annual basis.</b></p> <p>Review condition of community facilities and budget for planned and reactive maintenance link costs back to community chest allocated for the upkeep of buildings.</p> <p><b>D. Work with diverse groups requesting support for community activities to identify opportunities for usage of community facilities.</b></p> <p>Work with community organisers to ensure community facilities usage is reflective of local community and attendance and outputs clearly assessed and documented.</p>	<p>Draft recognition agreements circulated</p> <p>Targets in place for the collection of membership details</p> <p>Process in place to record Management arrangements</p> <p>Financial audit booklet launched and targets set for completion.</p> <p>Utility payment process in place.</p> <p>Condition of community premises assessed and maintenance cost charged back to community chest.</p> <p>Needs of diverse groups documented and understood and supported.</p> <p>Usage documented in community map directory attendance and cost monitored and service impact assessed.</p>	(42) We need to see effective management and monitoring policies for community buildings	<p>Documents attached on evidence return and fully explained</p> <ul style="list-style-type: none"> <li>• <a href="#">Recognition agreement and minutes of TRA meetings</a>- demonstrating progression toward achieving endorsed agreements with TRAs.</li> <li>• Template for recording membership (part of recognition agreement linked elsewhere) - demonstrating the organisations attempts to obtain membership details</li> <li>• <a href="#">Community mapping data</a> - demonstrating activity by area and current usage of community facilities.</li> <li>• <a href="#">Letter to TRA chairs and Financial Audit booklet</a> – demonstrating date information requested and financial data requirements.</li> <li>• Community building payments schedule – demonstrating payments recorded and monitored.</li> <li>• <a href="#">Community Building Condition report</a>-demonstrating condition and maintenance requirements of Building understood.</li> <li>• <a href="#">Report from Bengali welfare organisation</a> - demonstrating the organisation's advice and support for diverse community activities.</li> <li>• <a href="#">Impact assessments</a> - demonstrating the monitoring of community activity outputs.</li> </ul> <p>This is work in progress. We have encountered opposition from residents and progress has been slow. We are working to resolve this.</p> <p><b>Additional Evidence Provided</b></p> <p>A. <a href="#">Minutes of meetings with TRA Chairs and latest draft of Recognition Agreement</a> –</p> <ul style="list-style-type: none"> <li>• Minutes of TRA Chair meetings – demonstrating the joint work with the TRAs to resolve conflict on the recognition agreements.</li> <li>• Draft Recognition Agreement – Demonstrating progress made in last six months</li> <li>• TRA Mediator appointment Information – demonstrates that IH has appointed external consultants to help them understand and resolve the current barriers leading to the signing of a formal recognition agreement.</li> </ul> <p>B &amp; C. <a href="#">Community Facility Management</a> – Demonstrating management Arrangement, usage, budget and Expenditure for each centre.</p> <p>D. <a href="#">Centre Activities</a> – demonstrates diverse use of community centres and organised activities.</p>	<p><b>Response to TSA comments and additional questions raised on the original return</b></p> <p><b>(42) Management &amp; monitoring of community buildings</b></p> <p>- The TRAs currently manage the community buildings. This system is currently being reviewed by the Community Investment Team to evaluate its efficiency and assess whether it offers value for money. Once the review is complete a revised policy will be developed and implemented.</p> <p>- The Community Investment Team is working with the four TRAs to remodel the estate management agreements into recognition agreements and neighbourhood plans. This has been discussed at various meetings with the Chairs of the four TRAs and requested in various letters. See the <a href="#">Recognition Agreement Template</a>, point 7 of the <a href="#">letter sent to the TRA Chairs on 19 April 09</a>, the <a href="#">letter sent to TRA Chairs on 22 April 09</a> and point 10 of the <a href="#">minutes of the meeting held with TRA Chairs on 29 April 09</a></p> <p>- Neighbourhood Management Plans that are compliant with the E&amp;D plan are being developed by the IH Housing Services Team and once finalised we will be consulting with residents to obtain their thoughts and feedback and to ensure they meet the needs and requirements of all groups in the local community. See <a href="#">draft neighbourhood plan for the Kingsbridge estate</a>.</p> <p>- The Community Investment Officers are working with all groups using the Community Buildings to gain a full understanding of their financial arrangements, asking them to complete a <a href="#">financial audit booklet</a> containing details of their Income and Expenditure Account, provide a list of membership and to sign a recognition agreement (where this has not already been done).</p> <p>- Financials and usage of community buildings will be communicated to residents via the resident newsletter, consumer panels and forums and the website.</p> <p>- As we obtain more profiling data, this will be analysed and the results used to adapt and shape neighbourhood plans to ensure they cater for the needs and requirements of all residents in the local community.</p>

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<b>R6. Improve performance management and resident involvement by:</b>	<p>ensuring that an action plan for resident involvement with clear milestones for each of the key stages is developed and agreed with residents, including clarity over resident involvement in the Board.</p> <p>No resident involvement in the service improvement framework, plans for the new RIF are at an early stage and future arrangements for resident involvement in the board are not yet clear.</p>	20/11/2009	20/11/09 On going  20/05/09  20/04/09  20/07/09  20/08/09  ongoing  20/06/09  20/05/09  20/06/09	<p><b>A. Deliver Resident Involvement Framework (RIF) set up consultative groups detailed in RIF, and use feed back obtained to feed service improvement plans.</b></p> <p><b>B. Produce resident involvement packs for distribution to residents.</b></p> <p>Incorporating TSA suggestions in road map circulate to residents and key stakeholders set up a residents working party to monitor progression against target.</p> <p><b>C. Appoint an external tenant friend to work with resident.</b></p> <p><b>D. Work with residents and TRAs to remodel estate agreements into neighbourhood plans which include targets set in resident road map.</b></p> <p><b>E. Provide residents with relevant training to support them in their roles on panels and forums.</b></p> <p><b>F. Establish a reporting process to the Management Team and Board for any concerns and conflicts raised by residents.</b></p> <p>Set up an Island Homes specific resident consumer panel to monitor performance and influence service delivery. [RM 4.3]</p> <p><b>G. Increase resident representation on Board.</b></p>	<p>RIF approved by Board, 5 consultative groups. in place , 8 policies reviewed and agreed by residents in focus groups.</p> <p>Resident involvement packs produced and distributed to residents.</p> <p>Resident road map circulated to residents for comment and feedback via working party..</p> <p>Draft resident friend job spec ready for circulation.</p> <p>Draft Neighbourhood plans produced for resident consultation.</p> <p>Training schedules and evaluation process developed.</p> <p>IH Reporting process in place.</p> <p>Consumer panel in place which is representative of the local community and is monitoring and assessing performance against targets. Two additional resident Board member co-optees selected and appointed.</p>	(43) RIF and Roadmap progress to be discussed with lead regulator	<p>Documents attached on evidence return and fully explained:</p> <ul style="list-style-type: none"> <li><a href="#">RIF delivery plan</a> and focus group make up. – detailing a range of ways for residents to engage and influence service delivery and resident involvement in policy setting.</li> <li><a href="#">Resident Involvement Starter Pack</a> - demonstrating user friendly guidance on RIF.</li> <li><a href="#">Resident road map</a>. Demonstrating commitment of the organisation to achieve effective residents involvement and first class services.,</li> <li><a href="#">Job brief for external resident friend</a> – demonstrating progress towards appointment.</li> <li><a href="#">Draft neighbourhood plan</a> – demonstrating progress towards having these plans agreed and in place.</li> <li><a href="#">Training schedule and evaluation form</a> – demonstrating the analysis that is carried out following all training courses to assess its impact and to identify future training needs.</li> <li><a href="#">Performance reporting cycle IH</a> – demonstrating reporting framework is in place.</li> <li><a href="#">Consumer panel minutes and terms of reference</a>- demonstration that the panel has been set up with clear terms of reference.</li> <li><a href="#">Board member advert</a>- demonstrating progression toward target. Please note we have now interviewed and selected board members. We wait group board approve to appoint.</li> </ul> <p><b>Additional Evidence Provided</b></p> <p>A. <a href="#">Resident Service Improvement Priorities Impact Project</a> – demonstrates how residents have influenced service priorities and improvement plans.</p> <p>B. <a href="#">Resident Involvement Pack</a> – This additional pack highlights new opportunities available to IH residents.</p> <p>C. <a href="#">Resident Mediator (Replaces External Friend concept)</a> – Appointment letter demonstrates that IH has appointed and external mediator to help resolve conflict and tensions.</p> <p>D. <a href="#">Draft Neighbourhood Plan</a> – Draft Neighbourhood Plan for St. John's Estate shows how comprehensive the plans will be once agreed.</p> <p>E. <a href="#">Training Programme for Residents</a> – Programme highlights various training opportunities for residents on panels or attending forums.</p> <p>F. <a href="#">TRA Chair Minutes</a> – Demonstrates direct communication with the board via the IH Chair .</p> <p>G. <a href="#">IH Board Member Profiles</a> – Demonstrates Island Homes' commitment to increasing resident representation as the board is now at parity level and will be majority by the end of 2009.</p>	<p><b>Response to TSA comments and additional questions raised on the original return</b></p> <p><b>(43) RIF and Road Map progress</b></p> <p>- An action plan for the delivery of the <a href="#">Resident Involvement Framework</a> (RIF) has been developed.</p> <p>- We are on track for the delivery of the resident road map and have recommended the appointment to the board of 3 additional resident board members.</p> <p><b>Response to general questions raised on the evidence return.</b></p> <p>- All involved residents (which include those who are members of panels and forums) are invited to attend all training courses. If a resident wishes to attend but is not on the involved resident's database they are simply required to complete a form giving their details. Members of panels and forums are encouraged to attend training courses that help them to perform their roles more effectively. Upon being appointed to a panel or forum members are asked to complete a form providing details of their skills and experience and any specific areas of interest. Gaps are then identified and relevant training offered and arranged as soon as possible.</p>