

A toolkit for Housing Services' Tenant Inspectors



1 Introduction

This toolkit is intended to be a practical guide for tenants in Carmarthenshire who wish to be tenant inspectors to become actively involved in the hands on evaluation and inspection of their housing services and other council services.

In 2005, a tenant panel were successful in obtaining a TEG (Tenant Empowerment Grant) for £15,000 which enabled them to employ TPAS (Tenant Participation Advisory Service) to conduct an extensive 10 day training course to become tenant inspectors.

The recruitment of perspective tenant inspectors:

This was discussed with the TPAS member and the tenants panel members, and it was decided to arrange a presentation at each of the 6 area tenant network meetings, as well as advertising at the three customer service centres and in the tenants newsletter, 'Housing News'. This proved to be a success and 21 perspective tenant inspectors began the training course.

The training:

The training package was spread over a 10 day period. This entailed:

- Day 1** Taster session – quantitative audits, qualitative audits, desk top audits and mystery shopping.
- Day 2** Introducing mystery shopping and putting it into practice.
- Day 3** A tenant inspector's basic toolkit and guidelines.
- Day 4** The basic requirements of a tenant inspector and essential tenant inspector skills.
- Day 5** Skills and guidelines for tenant inspecting.
- Day 6** Increasing a tenant inspector's awareness and preparing for effective tenant inspecting.
- Day 7** The art of effective communication and dealing with situations that may arise.
- Day 8** Auditing and inspecting and putting these inspections into practice.
- Day 9** The process of audits and audit methods applied.
- Day 10** Final skills preparation and a final summary.

Full training is given to all perspective new tenant inspectors. This will now be done in-house by the existing tenant inspectors and the mentor. The training will not be as extensive as the original training package but each new inspector will shadow an original inspector for a certain period of time.

Recruitment of additional tenant inspectors:

Since the start of this project, additional tenant inspectors have been recruited as some of the original ones left with ill-health and for other reasons. Again recruitment was done via the six tenant networks and advertising.

The tenant inspectors plan to perform an annual recruitment programme.



2 Tenant Inspector Job Description

Listed below is a broad outline of what a tenant inspector may be expected to do:

Responsible to: Maria Evans, Tenant Participation Officer/ Richard Batt, Area Housing Manager, Housing Services Advisory Panel.

Key Objective: To carry out audits on services provided by Carmarthenshire County Council.

Methods to include (dependent on the type of inspection):

Mystery Shopping: Mystery shoppers test front-line services exactly as a tenant would. This could include 'shopping' in the customer service centres, or testing services over the phone. Mystery shoppers will be looking to see if set procedures are followed with tenants. They are also a good way to check the quality of customer service.

A mystery shopper could be making judgements about whether a service is welcoming, if staff empathise and make efforts to understand problems and whether or not premises are welcoming.

Work Shadowing: Shadowing involves spending time with someone (eg a Housing Officer or Tenant Participation Officer) and learning about their working day by simply following them around. It may be a particularly useful method to get an idea of the workloads and pressures of particular types of jobs. It is not meant as a way to check up on particular individuals and no such conclusions should be drawn.

Carrying out Surveys: Surveys could be conducted by post, over the phone or in person. They are one of the best ways to check if services are up to scratch. Those involved can also design, conduct or analyse them. Surveys could be conducted on new tenants to ascertain their views on the waiting list times, the induction into a Council property, the standard of the property, and so on.

Interviewing: In order to form a full picture of a service, an inspector may wish to interview staff and tenants, to gather views and check how widely understood certain aspects of a service are. Interviews could be more detailed than a survey, as open and closed questions can be used.

Desktop Reviews: The object of these reviews is to establish what has been agreed about a service. The priorities, performance measures and accountability can all be looked at. This can be achieved by looking at all relevant documents such as the Housing Services' business plans, reports, newsletters, strategies, performance monitoring information and evidence of how it is reported and to whom.



A suitable tenant inspector should have the following qualities and abilities:

- Good concentration.
- An ability to handle confidential information.
- An ability to prioritise information and decide what is important.
- Good communication skills.
- Good inter-personal skills.
- Tact.
- Diplomacy.
- Professionalism.
- Presentation and report making skills.
- Ability to work to deadlines.
- Team working ability.

Terms of Reference for the Tenant Inspector Project:

Aims:

To carry out inspections on services provided by Carmarthenshire County Council on behalf of tenants in accordance with the current Service Standards

Objectives:

- To equip the tenant inspectors with the necessary skills to enable them to conduct detailed and robust assessments of service delivery.
- To empower the tenant inspectors to develop their skills to carry out independent inspections.
- To develop the expertise of the tenant inspectors to provide structured and achievable recommendations where necessary.
- To develop existing partnership working practices between tenants and the landlord.
- Tenant inspectors will become an integral part of the Housing Services in order to ensure continuous improvement of the service standards

Membership:

Existing Tenant Inspectors.
Scope to train new tenant inspectors as and when project progresses and when required.
All Housing Services staff when and where required.

Reporting:

All inspection results will be provided in a report to the Housing Services Advisory Panel.
Results will also be published in the quarterly Housing News publications.

Complaints:

All complaints within the tenant inspection remit will be reported to Richard Batt, Area Housing Manager.
Each complaint will be looked at on an individual basis.



Inspections completed to date:

Allocation of new tenancies – a telephone survey was conducted with a sample of new tenants.

Estate Management – a telephone survey was conducted with a cross-section of tenants with questions based around recycling, dog fouling, litter, etc.

New tenants – door-to-door surveys were conducted on a sample of new tenants asking questions on the application form process, tenancy agreement, and condition of property.

Housing website – a desk top survey was conducted on the website with comparisons drawn to other local authorities' websites. This survey included suggested amendments to the current website.

Customer service centre – a mystery shop and a survey were conducted on all three customer service centres. This focussed on the actual set up, the accessibility, signage, the service received, and so on.

All completed inspections are presented to the relevant sections and are discussed at the Housing Services Advisory Panel which consists of six tenant representatives from each of the tenant networks, six local members and heads of services. The summary of results are also published in the tenants newsletter, 'Housing News'.

Inspections planned for the future:

The tenant inspectors always decide as a group on their future surveys which are set out over a 12-18 month period. The ideas come from a range of outside factors, including tenants' surveys and from speaking to other tenants.

For 2009/10, the tenant inspectors will be focussing on the following services:

Waste services – consultation with the public on the new waste collection service, recycling, trade waste, clinical waste collections, etc.

Repairs – an extensive inspection on a number of issues such as responsive repairs, the appointment system, the contact centre, work shadowing with the technical officers, etc.

Tenant participation – research into the current tenant participation practices, works shadowing the tenant participation officers, etc.

Estate improvements – walkabouts with the housing officers to identify how estate improvements are monitored, how the environmental works projects will benefit each community, etc.



The resources currently available:

Tenant inspectors work on a voluntary basis. Travelling expenses are paid as well as subsistence payments in some circumstances.

The tenant inspectors are able to use the three tenant resource centres, based in Carmarthen, Llanelli and Ammanford for telephone and pc usage, photocopying, etc.

The tenant participation officer for Carmarthen acts as the group's mentor and is available for advice on inspections and currently acts as the admin support.

Training:

An ongoing training programme is vital for the tenant inspector project as it gives them the knowledge and skills required to carry out the inspections. It also boosts their confidence and gives a professional edge to the inspections.

Training is decided on by the tenant inspectors.

Some training courses have included:

- IT skills
- Report writing
- Newsletter writing
- First Aid
- Personal safety

Confidentiality:

All the tenant inspectors are clear on their own roles and responsibilities and realise that confidentiality is a crucial issue.

Each tenant inspector signs a confidentiality agreement at the start of their training.

Each tenant inspector is also issued with an ID badge and wears it before entering into another tenants' home. The mentor will always ask the tenants' permission beforehand to check that it's ok for a tenant inspector to visit at their homes.



3 Confidentiality Agreement for Group Tenant Inspectors

As Tenant Inspectors you will have access to both sensitive and confidential personal information, as a necessary part of your role. The information is held by Carmarthenshire County Council's Housing Service Division and must only be processed only for the notified purposes in the Data Protection register and in line with the Data Protection Act 1998.

Access to this information will be strictly controlled and only provided if it is necessary for the specific audit you are carrying out. Information will be provided in confidence and on the conditions it is used solely for the purposes of conducting the audit. **The information must be kept confidential at all times and should not be discussed with anybody outside of the Housing Services Division or the other Inspectors involved in the audit.**

In particular you should never discuss any personal information with a tenant unless they are the subject of that information.

Any breach of confidentiality will be considered by the Head of Housing Services who will take the appropriate action that is deemed necessary.

Information obtained as part of your audit must only be retained for as long as necessary to complete the audit and have the results ratified if necessary. Once the audit is completed any data collected should be destroyed.

Please sign, print your name and date the form below to show you understand the terms and conditions of this document and return to Maria Evans, Tenant Participation Officer.

Name _____

Signature _____

Date _____



Health and Safety:

Another important issue the tenant inspectors have to think about is health and safety. This was a key part of their training and was undertaken over a 3 day period by one of the council's health and safety officers.

The training looked at a number of issues such as:

- Lone working
- Smoking at work policy
- Keeping safe at work
- First aid at work
- Risk assessments.

All tenant inspectors work in pairs at all times. All are issued with the personal safety guide (prepared by the Suzie Lamplugh Trust).

Code of Conduct:

By having a code of conduct in place, it is a good way of instilling a sense of professionalism and trust amongst the group and for external partners.

The code of conduct was designed by TPAS and the tenant inspectors.



4 Code of Conduct for Housing Services' Tenant Inspectors

This Code of Conduct sets out the rules of the project and the standards of personal attitudes and behaviour that you must observe as a tenant inspector. Complying to these guidelines is critical to the success, sustainability and credibility of the tenant inspection project. The role of a tenant inspector is purely on a volunteer basis and is not paid work.

Who can be a tenant inspector?

To be a tenant inspector, you must:

- Be a current tenant of Carmarthenshire County Council or;
- Be a partner/spouse/ child (over the age of 18) of a current tenant of Carmarthenshire County Council and;
- Have had basic training about the aims of the project and the skills, attitude and techniques required.

You cannot be a tenant inspector if you:

- Are a current employee (or partner or spouse of an employee) of Carmarthenshire County Council.
- Have a current court order against you for breach of tenancy or leaseholder agreement, or are a partner/spouse/child (over the age of 18) living at the same property of a tenant who has a current court order against them.
- Are a resident (purchased your property under Right to Buy).

Your Role:

As a tenant inspector, your role is to carry out detailed and robust assessments of the services provided by Carmarthenshire County Council and suggest how they can be improved (if need be).

To do this, you must approach your role with the **right attitudes**:

- **Be honest and open.** Without honesty and openness, you won't be able to get the truth about the service or be able to make a difference.
- **Be positive.** It is important to highlight any problems or failings, but make sure that you also pick up on and report good points and successes. Always try to look for and suggest improvements to make the service better as this will benefit both tenants and staff.
- **Be amenable, courteous and respectful.** You will get co-operation and support from people if you build and keep a good personal relationship with them. You must not insult, abuse or use any kind of offensive behaviour or language towards anyone you may have contact with as part of the project. Be tough on the problems, not on the people.
- **Listen and keep an open mind.** Don't be judgemental before you have collected all the information, facts and evidence. Try to appreciate the concerns and circumstances of the people with whom you come into contact.
- **Be interested in the service.** Actively show the tenants and staff that you care about the service that you are inspecting and that you want to make a positive difference.
- **Give appropriate feedback.** This is about giving feedback at the right time, in the right place, and in the right way. Do not share your thoughts and findings, impressions and ideas with people whilst you are still collecting evidence from them.
- **Follow relevant rules and practices.** Health and safety guidelines, such as dealing with potentially violent and aggressive people, smoking in public places, etc.



Being Objective:

As a tenant inspector, your direct experience as a customer makes you and your perspective special and unique. However, your own experience and views should inform, but not dominate or dictate how you work. To help you stay impartial and avoid any conflicts of interest, you must:

- **Avoid areas of links to yourself.** Do not audit or inspect areas that you have a specific link to you or your local area.
- **Declare interests.** Let the inspection team know in writing if you have any personal connection with any part of the service that you are asked to inspect.
- **Self Challenge.** Look for evidence that tests and challenges your own personal experience of the service and organisation. Your views may not reflect those of customers generally and your previous experiences of a service may not be typical as usual of the standard normally delivered.

Handling Information:

As a tenant inspector, you will have access to a lot of information about Carmarthenshire County Council and its' customers and suppliers. Some of this information could be personally or commercially sensitive, and you have to judge whether to share things or keep them confidential.

This can be a difficult balance, so you should follow 2 simple rules in all your work:

Rule 1:

Treat all information that you receive as confidential, unless there is a clear reason to share it more widely. So, for example, you should use and share any information that you collect about what service is provided, how and why. But you should not share information about members of staff or customers, personal identities or circumstances.

Rule 2:

If you are in any doubt about whether something is confidential or not, please check with your mentor or Area Housing Manager immediately.

Disclosure of highly sensitive and confidential information:

It is possible that you may come across something during your inspection that really worries you [eg if you think there is fraud going on, or any sort of criminal activity]. If this happens you must immediately tell the Area Manager. You should disclose this information discreetly, keeping it confidential from any other person outside your inspection team. You may be asked to provide a detailed report.

If you are required to do this, Carmarthenshire County Council will not disclose who has given the information and you will be able to continue with your work. Depending on the nature of the information and the extent of the confidentiality involved, Carmarthenshire County Council may not be able to tell you what has happened as a result of your information disclosure.



Conduct:

All tenant inspectors must act in a democratic manner towards all other members and accept accountability for any actions carried out by themselves.

Tenant Inspectors who are believed to be bringing the group into disrepute, by making defamatory comments or tarnishing the reputation will be suspended immediately pending further investigations by the Area Manager. The decision following these investigations is final.

All members of the Tenant Inspectors group must treat others fairly and with respect. No one will be discriminated against for reasons of race, colour, nationality, ethnic or national origins, language, disability, religion, age, gender, gender reassignment, sexual orientation, parental or marital status. Any behaviour or action that undermines these principles is not acceptable. When someone's words or actions violate another person's dignity or creates an environment that is intimidating, degrading or offensive, the member will be suspended immediately pending further investigations by the Area Manager.

Probationary Tenant Inspectors:

New tenant inspectors will be classed as probationary until training is completed, either externally (such as with TPAS Cymru) or internally (by Housing Services), and have undergone 2 independent inspections by work shadowing an experienced tenant inspector.

Electing new Chair of Tenant Inspector group:

A new Chair of the tenant inspector group shall be elected on an annual basis at the same time as the Code of Conduct is reviewed.

Staying safe:

Before you start any inspection, Carmarthenshire County Council, will do a short exercise to identify and assess any risks that might arise from your work.

You must then observe any rules or guidelines that come out of this risk assessment and take reasonable steps to ensure your own health, safety and welfare.

If you feel under too much pressure or stress because of your work as a tenant inspector, please talk to your designated mentor.

Tact and Diplomacy:

Aside from these formal protocols, you will need to be tactful and diplomatic in all your dealings with people as part of the project. You will need to use your own judgement, but always think about how you say what, to whom, and what impact it will have.



Being fair:

In your work as a tenant inspector, you must have and show respect for the people you deal with and take their circumstances and personal differences into account. This is about putting equal opportunities into practice in your work. The key is to respect differences fairly, so that you do not exclude anyone from your work, or treat anyone inappropriately or unfairly.

This requires some thought and preparation, and you alone can ensure that you carry this out. In your work you need to think about:

How you assess the service. Does it allow everyone to have their say? With a phone survey, you may need to plan for different language use, consider the use of an interpreter where necessary and also to make provisions to work with people living with hearing or other impairments.

Where you work. If you hold interviews on a top floor or in a basement this may make it difficult to include people with limited mobility.

When you work. You may need to provide more than one opportunity to include those with child care responsibilities or in full time employment. It is your responsibility to make efforts to include everyone. If there are difficulties discuss this with your colleagues or an employee of Carmarthenshire County Council.

Being professional:

Being professional is about all of the previous aspects but it is also about how you conduct yourself personally. As a tenant inspector, you are an ambassador for yourself, for tenants and the whole project. Most people will judge the project by how you present yourself and behave.

So to project a good professional image, think about:

- **Appearance** – project a clean, smart and appropriate image.
- **Speak** – be clear, concise and always courteous in your speech.
- **Body language** – be relaxed, focussed and positive.
- **In control** – never do an inspection, if you have recently had alcohol, illegal drugs, are too tired or have done anything that might affect your concentration and poise.



Disciplinary Code:

Any tenant inspector or probationary tenant inspector who is found in breach of any part of the Code of Conduct, or shown to be in abuse of his/her position, will be suspended from the group pending further investigations from the Area Housing Manager. I have read and understood the contents of this code of conduct and as a tenant inspector I accept these rules and guidelines. I agree to adhere to this code of conduct. This code of conduct will be reviewed on an annual basis.

Signature _____

Date _____

EXAMPLE



The Future:

The tenant inspector project has been established for the past three years and is now an integral part of Housing Services. It is fully recognised group which links to all of the tenant movements within Carmarthenshire.

The group hope to expand its membership in 2009 and maintain their training plan, and assist in the continuous improvement of Housing Services and other related services.



Useful contact numbers:

Trish Tyler – chair of the tenant inspection group – 01550 750220

Maria Evans – mentor/tenant participation officer – Taf, Teifi, Tywi – 01267 228933

Janet Griffiths – tenant participation officer – Aman/Gwendraeth – 01269 598311

Pat Evans – tenant participation officer – Llanelli – 01554 742216