



ESTATE MANAGEMENT STRATEGY

2007 – 2012

www.respond.ie





Respond!, formed in 1982, is one of Ireland's largest housing associations. We seek to create a positive future for people by alleviating poverty and creating vibrant, socially integrated communities. We provide a range of services from design and planning through to management and care. Respond! designs and constructs dwellings for traditional families, lone parent families, the elderly, homeless and other special need groups.

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By

Respond! Housing Association,
Airmount,
Dominick Place,
Waterford.

Lo-call: 0818 359701
Web: www.respond.ie
Email: info@respond.ie



Table of Contents

1	Introduction	3
2	Estate Management Strategic Aims & Objectives	4
3	Detailed Strategic Area	6
4	Management	8
5	Maintenance and Repairs	10
6	Financial Management	12
7	Estate Management Staff	14
8	Customer Satisfaction	16
9	Ensuring Compliance	18
10	Administrative, IT and Support Systems	20
11	Summary of Targets	22
12	Appendix	29



1 Introduction

In this, the 25th year of the Respond! organisation, it is appropriate that we review our commitment to best practice estate management with the production and implementation of a detailed estate management strategy (EMS) for the period 2007-2012 and onwards.

The ultimate estate management objective is to ensure that Residents receive a level of service which is timely and professional and that as Landlord, Respond! delivers on the ethos of the organisation and the duty of care to our residents. The purpose of the Estate Management Strategy for both Respond! staff and residents is to ensure that the role of the Estate Officer and that of the resident is clearly set out.

The weekly letting contract is a legal document that sets out the basis of agreement between the tenant and Respond!. It is this document that is the first point of call where disputes arise.

This strategy is a precondition for and underpins the Community Development strategy that Respond! has produced earlier this year and which is currently being rolled out in all of our estates countrywide. Respond! stresses that its role as Landlord is defined in law and must accord to its letting agreements with its tenants. However, Respond! is concerned as a charitable organisation to offer support services beyond those mandated by the legal tenant/landlord relationship: this is the basis on which it sets out its community development objectives.

Some of the areas that the EM Strategy will cover include the following:-

- Allocations Policy and Plan
- Management
- Maintenance
- Financial Management
- Customer Satisfaction
- Ensuring Compliance and Accountability for both Staff and Tenants
- Administrative, IT and Support Systems.

Incorporated in the strategy is a process of review at different elements and a process of reporting in order to enable proper analysis of the success or otherwise of the implementation of the strategy.

The success of the EM strategy will be paramount to the delivery of coherent and effective Community Development operations. The professional delivery of the EM strategy and the adherence to quality requirements will ensure that our residents will receive the best practice Estate Management services that can be provided.

We will place at the heart of these services Customer Satisfaction and means by which this can be tested and improved. Regular feedback and participation in the review of our EM services will ensure that we are targeting both efficient and effective EM services.

2 Estate Management Strategic Aims & Objectives

This EM Strategy is based on a number of core aims and objectives, which are set out below. We will regularly review these Aims and Objectives to ensure that they are current and relevant to the modern delivery of best practice EM services.

This EM Strategy is based on the core principles of our Mission Statement which is set out below and we guarantee as a minimum that we will deliver on these Aims and Objectives as a minimum.

Mission Statement:

Respond!'s motivation, as a non-profit Housing Association, and its mandate in law as a social landlord determine that it should seek to provide the best tenant services possible within the resources provided to it from tenants' rents supplemented by government finances. Our aim is to provide professional, timely and the highest quality Estate Management (EM) services to all out residents in line with our legal requirements and in the furtherance of the Community Development ethos of the organisation.

Allocations and Assessments

Objective:

To comply with Respond!'s policy of creating vibrant, integrated and self-reliant communities rather than estates which provide mere shelter or accommodation, careful consideration is given to the overall needs of the estate in question, i.e. generally favouring a community lettings policy where such can be legitimately implemented in reference to respective local authority standards. Single class, segregated estates which accommodate only or mostly low-income and poorly resourced families do not provide social environments in which any of the residents can be optimistic about achieving well-balanced and wholesome prospects for themselves or their children. As a charity which seeks to confront poverty and lack of resources and opportunities in such estates. Respond! strives to create mixed communities of persons of varied ages and with varying levels of family income and educational attainments.

Management

Objective:

To create the vision of clean, well management estates where Residents feel safe and proud to live, Respond! will ensure that our EM staff will be on site, reviewing repairs, maintenance, graffiti, litter and general upkeep of the estates on a regular basis. Respond! will ensure that there is regular communication with Residents on EM matters and keep them informed of all issues which will impact on their homes.

Maintenance and repairs

Objective:

To ensure the long term sustainability of the housing units under Respond!'s management, the Estate Management team shall provide proactive maintenance support to residents and estates. This includes regular site inspections to note any structural or major items of a property deteriorating nature, the cyclical maintenance of existing stock, maintenance of the Communal Facilities, ensuring that the focus is on peaceable enjoyment of homes on Estates. This includes the identification of any necessary reactive maintenance work to be carried out, as appropriate, by either the landlord or the tenant in an efficient and timely manner.

Financial Management

Objective:

To ensure that there is proper control by the organisation of financial and other assets to cover current and regular estate maintenance and management costs as well as any future major items of expenditure in conformity with this current estate management strategy.

Estate Management Staffing

Objective:

To recruit, train and deploy a complement of professional estate management staff to meet the best practice standards required under our estate management strategy. These staff will work regularly and closely with local tenant participation committees to ensure the peaceable enjoyment by all of the resources of our respective estates.



Ensuring Compliance*Objective:*

To ensure that both Respond! and Residents adhere to the agreed best practice principles we will instigate a means of reporting on areas such as rent calculations, arrears management, maintenance completion and quality and resident satisfaction to ensure that compliance is maintained at the highest levels by both EM staff and Residents.

Resident Satisfaction*Objective:*

To provide a friendly, accessible and efficient service to residents with a view to best practice on all aspects of customer liaison, whether by verbal, written or other means. To provide feedback on issues raised in a timely manner. To be open and forthcoming in dealings with customers and to provide a means of obtaining satisfaction ratings from customers on the services we provide.

Administrative, IT and Support Systems*Objective:*

Respond! will provide sufficient professional support services to our front-line estate management staff to enable them to carry out all their functions to best practice standards.

3 Detailed Strategic Area

Allocations and Assessments

Relevant Policy and Procedures:

Tenant Letting Conditions – Family

Tenant Letting Conditions – Elderly

Assessment Protocols

Tenant Handbook 2007

Objective:

To comply with Respond!'s policy of creating vibrant, integrated and self-reliant communities rather than estates which provide mere shelter or accommodation, careful consideration is given to the overall needs of the estate in question, i.e. generally favouring a community lettings policy where such can be legitimately implemented in reference to respective local authority standards. Single class, segregated estates which accommodate only or mostly low-income and poorly resourced families do not provide social environments in which any of the residents can be optimistic about achieving well-balanced and wholesome prospects for themselves or their children. As a charity which seeks to confront poverty and lack of resources and opportunities in such estates, Respond! strives to create mixed communities of persons of varied ages and with varying levels of family income and educational attainments.

Delivery of this objective:

Nomination of Prospective Tenants

When a new scheme is being allocated, or when a re-let is available, the nomination of prospective tenants will be undertaken promptly in accordance with allocation agreements between Respond! and the respective Local Authorities. Local Authorities are invited to offer for assessment **3 prospective applicants for every vacancy**.

On new schemes with first lets the EM Supervisor will seek a list of prospective tenants from the relevant Local Authority more than **6 months from date of handover**. The EM Supervisor will meet with the design teams to ensure there is an appropriate flow of information on design and handover.

Application Process

On receipt of an application for a rental property Respond! will issue a response via letter within **5 working days** to notify the prospective tenant of the process and time in which a definitive response will be issued.

Assessments

These are carried out in the prospective tenants' homes, where appropriate. Respond! will pay attention to the housing needs of each applicant as well as to their likelihood of integration into the estate for which they are applying. An Assessment will be undertaken within **15 working days of application**.

Allocations

On completion of the assessments and a review of the applicable properties, in accordance with the Assessments Policies of Respond!, a prospective allocation is made and notification given to the prospective resident. Notification will be made to the successful and unsuccessful applicants within **10 working days** of the allocation process having been completed.

Pre-tenancy and Post move in courses

These take place in advance of allocating the property but after the assessment and confirmation that allocation will take place and subsequent to move-in. Each scheme is different but in general we anticipate **5 pre-tenancy meetings** in advance (**within 1 month of move in date**) and at least **1 after move-in (within 1 month of move in)**. These courses are to be run and managed by EM Staff.



Casual Vacancies

All allocations for casual vacancies will be filled **within 4 weeks** of notification of vacancy. The process for filling these vacancies is as stated above.

Ethical Policy

Respond! has an inclusive and equality policy in respect of its allocations and persons/families of different religions, ethnic backgrounds or sexual orientation will be equally assessed in relation to the aforementioned policy. Where necessary interpreters will be used to facilitate the assessment process.

Reporting & Review:

Assessment teams to meet **weekly**.

A **monthly** report of the allocations and assessment work in the region will be provided for the Regional Manager. Ad hoc reports will also be given in the interim where problems are arising and a decision is required from the Regional Manager.

A **monthly** updated of the waiting list for the region to be provided to the Regional Manager.

There will be a **bi-annual review** of the Allocations and Assessments procedures and policies.

4 Management

Relevant Policy and Procedures:

Tenant Handbook 2007

Anti Social Behaviour Policy

Good Neighbour Charter

Tenant Letting Conditions

Cash Handling Policy and Procedure

Objective:

To create the vision of clean, well management estates where Residents feel safe and proud to live, Respond! will ensure that our EM staff will be on site, reviewing repairs, maintenance, graffiti, litter and general upkeep of the estates on a regular basis. Respond! will ensure that there is regular communication with Residents on EM matters and keep them informed of all issues which will impact on their homes.

Delivery of this objective:

Estate Visits

All estates will be visited at least **once a week** and will be reviewed for excessive litter, graffiti, and visible maintenance issues.

100% of residents in each estate will receive a visit **each week** to discuss and review issues of ASB and any other security or safety concerns that may exist. This will be reviewed after 6 months.

Community Buildings

EM staff will visit each **Community Building each week** to ensure that it is being maintained in good condition and that the relevant services are being provided to it. All maintenance issues will be reported to the Maintenance Officers.

Letting Conditions

Each week EM staff will review the general estate appearance to ensure that Residents are complying with their letting conditions. Where necessary Residents will be notified verbally first and then in writing that they must comply with their letting conditions.

Good Neighbour Charter

EM staff will ensure that the conditions of the Good Neighbour Charter are being implemented and that regular visits of the elderly are being carried out as agreed. A **monthly meeting** with those involved in the Good Neighbour Charter will be held by EM Staff.

Estate Clinics

EM staff will hold a **monthly estate clinic** in the community building for the purposes of arrears management and maintenance reporting by Residents. These meetings are to be undertaken **in conjunction with and not instead of** the weekly estate visits and weekly visits to Residents' homes.

Cash Collection

EM staff will collect, where offered by tenants, any cash payable in respect of rent arrears. Such cash collections will be subject to the Cash Handling Policies and Procedures issued by the Company Treasurer in 2006.

Reporting & Review:

Regional Managers to receive **weekly report** of visits undertaken by EM staff and issues raised in weekly meetings with Residents.



Regional Managers to receive a **weekly report** on cash collected on estate visits.

Quarterly review by Finance Department of cash handling procedures on a random visit basis.

Summary report on a **monthly basis** of issues of ASB, graffiti, excessive litter, and maintenance issues to be prepared for both the Regional Manager and Senior Management Team.

Quarterly review and report of use of Community Buildings to be provided to Regional Manager and Senior Management Team.

Annual review and report, in conjunction with **Tenant Participation Committee**, of services and uses of Community Buildings to be provided to Regional Manager and Senior Management Team.

EM staff are to record notes of all visits to Residents and to present those notes to the Admin staff for writing up and analysis on a **Monday morning**. Regional Managers will review these reports on a **weekly basis**. A proforma notebook with Resident receipt is to be provided for this purpose. This will become part of the mobile IT systems in time.

5 Maintenance and Repairs

Relevant Policy and Procedures:

Tenant Handbook 2007

Letting Conditions

Repairs and Maintenance Handbook

Cyclical and Planned Maintenance Programme

Objective:

To ensure the long term sustainability of the housing units under Respond!'s management, the Estate Management team shall provide proactive maintenance support to residents and estates. This includes regular site inspections to note any structural or major items of a property deteriorating nature, the cyclical maintenance of existing stock, maintenance of the Communal Facilities, ensuring that the focus is on peaceable enjoyment of homes on Estates. This includes the identification of any necessary reactive maintenance work to be carried out, as appropriate, by either the landlord or the tenant in an efficient and timely manner.

Delivery of this objective:

Planned/Cyclical Maintenance Programme

The planned and cyclical maintenance programme is dictated by the age of the stock units. The programme of planned maintenance and cyclical maintenance is to be carried out as per that plan.

The cyclical plan will be reviewed **annually** and updated based on property inspections.

The planned maintenance programme will be reviewed **every 2 years** based on the reactive repair spend and the cyclical maintenance programme.

The National Stock Manager will liaise with regional Maintenance Officers to draw up a planned and cyclical maintenance programme and report this in **March each year** for inclusion in the following year's budgets.

Regional Managers will be responsible for the delivery of the planned and cyclical maintenance programmes each year and will report **quarterly** on progress against the targets.

The programme per estate will, after consultation with the residents, be issued to them in the **annual report**.

EM staff will carry out **100% stock inspection each year**. This is to tie in with estate visits. This will enable the Maintenance Officers and National Stock Manager to build up an accurate picture of the current state of our houses and community buildings.

Reactive Maintenance Regime

The following timescales will be used for the completion of reactive repairs:

- Emergency repairs response within 24 hours
- Urgent repairs within 72 hours
- Routine repairs within 21 days

All repairs reported will be acknowledged by EM staff within **24 hours**.

All contractors are to offer an appointment to Residents **within the above timescales**.

All repair requests below **€100** may be approved by the **Maintenance Officer**.

All repair requests between **€101 and €1,000** must be approved in advance by the **Regional Manager**.

All repair requests above **€1,001** must be approved by the **National Stock Manager**.



All repairs and maintenance works are to be entered on the National Maintenance system – Maint+

Maintenance Officers are to inspect **all repair** requests where the likely estimate is **over €1,000** and at least **20%** of those **under €1,000**.

Maintenance of communal facilities

The maintenance of the building structure and surrounding areas is the remit of the EM staff. Any programmes or income generating schemes in the Communal Facility will have to contribute to the cost of maintenance of the building.

Planned Maintenance of the Communal Buildings plus Reactive Maintenance of the buildings is the responsibility of the EM staff.

Together with the CDO, maximisation of funding for capital works from 3rd party agencies can be instrumental in upgrading the building for the betterment of services being provided for our tenants.

National Stock Management

The National Stock Manager is responsible for programming the cyclical maintenance and 10, 25, 50-year replacement of items included in the Programmed Budget. The National Stock Manager has responsibility for the monitoring of costs in accordance with the approved budget.

Void Maintenance

Once a void is reported, EM staff are expected to have the property re-occupied **within a 4-week period**. Void repairs to be carried out **within 2 weeks** of notification of void.

Under the new visiting regime abandoned properties should be more quickly recognised.

The National Stock Manager is to set up a **standard void works schedule** with estimate costs. **All voids** to be returned to a lettable condition as approved by the National Stock Manager.

All void costs to be agreed with the National Stock Manager prior to their commitment.

Reporting & Review:

EM staff to prepare **monthly void reports**.

National Stock Manager to prepare summary reactive repair, cyclical and programmed maintenance reports outlining the ongoing cost of such repairs/programmes and the major components of those areas on a **quarterly** basis.

National Stock Manager to provide reports on **quarterly** basis of target timescales for repairs completed and a quality report on work carried out.

Adhoc reports on significant maintenance/insurance issues to be completed by Regional Managers.

Annual Cyclical Maintenance review report to be produced by the National Stock Manager

Annual report on planned maintenance programme to be prepared by National Stock Manager.

Quarterly report to tenants to be prepared by Regional Managers and Maintenance Officers on repairs carried out on estates and future programme of maintenance.

6 Financial Management

Relevant Policy and Procedures:

Tenant Handbook
 Letting Conditions
 Repairs and Maintenance Handbook
 Differential Rent Calculation
 Rent Arrears Administration Process
 Management Accounts
 Rent+ reports

Objective:

To ensure that there is proper control by the organisation of financial and other assets to cover current and regular estate maintenance and management costs as well as any future major items of expenditure in conformity with this current estate management strategy.

Delivery of this objective:

As a precondition of its approval as a housing association Respond! undertakes to let its social rental housing to those in most need economically and socially. The rents, determined according to statutory formulae, are defined so as to take account of the affordability potential of the tenants: all the rents, accordingly, are within the financial capability of the tenants, **provided** they do not fall into arrears.

Respond! has added a further dimension to the statutory terms for the benefit of the tenant whose income may have improved in time: a **capped rent**.

Setting of Rent

Respond! sets the Family (under the CLSS scheme) rent **annually** based on the differential rent calculation and inflationary rise in the capped rent. Rent changes effective from **1 July each year**.

The differential rent calculation €12.50 weekly plus 20% of the net household income above €102 per week.

We are required to obtain proof of income for the previous year. These documents are crucial to ensuring that the correct rent is charged. Letters requesting these income details are issued to the residents by **15 March**.

CAS rents are set **annually** and are effective **1 July each year**.

CAS rents are determined by the economic cost of running and estate and set of properties. All CAS rents are to be agreed with the Company Treasurer **before** they are issued to tenants.

Collection of Rents

Rent is collected using swipe cards, standing orders, cheques, cash and money orders. The priority for all EM staff is to ensure that Residents are using the **swipe cards** for payments of rents.

Other methods, such as MABS, Household Budget, Standing Orders are allowed but these can lead to delays in posting the rent to the correct account and incorrect statements.

Residents to be reminded to **keep receipts** of payments.

Rents are set by Respond! according to an approved government formula which takes due account of the ability of the tenant to pay: a differential rent. This rent is well within the financial capacity of all our tenants, no matter how low their income may be – it does take full account of such low incomes. Furthermore, Respond! has itself introduced a ‘capping’ system which ensures that tenants whose incomes increase are not euro-for-euro penalised by the formula. Accordingly, it is a disservice to any of our tenants to allow them to slip into excessive arrears, which may frustrate their efforts to get back to a more regular and economic paying pattern. This is why Respond! operates a Zero



Tolerance system in relation to rent arrears. **Zero tolerance** on rent arrears is now expected on all estates. EM staff, through their weekly visits to tenants are to ensure that all Residents are aware of this policy.

Rent may be collected by EM staff on weekly visits to estates. All cash/cheques collected in this way will be subject to the Cash Handling Policy and Procedures as issued by the Company Treasurer in 2006.

Rent Default and Arrears

EM staff are responsible for their Estate Arrears and systems and processes are in place to ensure that the percentage of arrears is as low as possible.

Intervention by an EM staff member should occur when a resident is showing **2 weeks in arrears**.

The deadline for receipt of income documentation is **1 June annually**. Non-supply of these documents will be classified as a breach of letting and could result in legal process being pursued.

Strict adherence to the arrears process is expected from each Officer. The 7-day notices and NTQ's have to be kept up to date and on file including all the relevant paper work.

In exceptional circumstances arrears are reviewed in light of an individual's circumstances but as the rent is calculated based on net income there is no reason why arrears should be accruing.

Respond! will pursue outstanding arrears through **the Courts**.

Respond!'s key area for arrears prevention is in **early intervention**. The use of MAB's and Household Budget should be notified to the tenant where **2 weeks of arrears** is evident.

There will be a reduction in annual arrears percentage for those who have provided income documentation from a current level to **2-3% over the coming 12 months**.

There will be a reduction in annual arrears percentage for those who have not provided income documentation from a current level to **2% over the coming 12 months**.

Zero tolerance in relation to arrears on all new estates

Residents to receive **quarterly rent statements**.

Government Financial Contributions

Annually the Management and Maintenance subsidy for CLS units is submitted to the Local Authorities in March of each year.

Reporting & Review:

EM Teams to meet **weekly** to discuss arrears actions.

Regional Managers to receive a **weekly report** of all cash collected by EM staff on weekly estate visits.

Fortnightly meeting of Regional Manager and EM Supervisor to discuss the action being taken on estates to reduce arrears.

Weekly arrears movements and outstanding balances to be provided to Regional Manager and Senior Management Team.

Weekly updates on NTQ and 7 day notices issued and progressed.

Weekly arrears visit schedule to be submitted to Regional Manager by EM staff.

7 Estate Management Staff

Relevant Policy and Procedures:

Staff Policy and Procedures Handbook

Training manual

Salary Scales

Objective:

To recruit, retain, train and deploy a complement of professional estate management staff to meet the best practice standards required under our estate management strategy. These staff will work regularly and closely with Residents and local tenant participation committees to ensure the peaceable enjoyment by all of the resources of our respective estates and the compliance of the letting agreements in place.

Delivery of this objective:

Recruitment, retention and training of Staff

The recruitment of Estate Officers to fulfil the implementation of the strategy will be done where the resources are needed. It is anticipated that we will have the following ratio of Estate Management personnel to housing units:

- Urban centres up to **400 units per staff member**;
- Rural areas up to **300 units per staff member**;
- Admin Support **1 Admin support per regional office.**

EM staff will attend in house and external courses to improve their learning and be more effective on Estates.

As a general guide there will be a minimum of **6 training days per year** but it could be more depending on the need.

Training will cover property management and inspections, client awareness, conflict resolution, arrears management, drugs awareness and other relevant courses.

Deployment

The purpose of deployment is to achieve **maximum contact** with our Residents and therefore greater engagement with Respond!. This will enable Respond! to gain a greater understanding of our client base which in turn will lead to better service provision on estates.

The estates will be arranged in **clusters** to avoid excessive travel time between estates and to maximise estate presence.

Each estate is to be visited weekly, each tenant is to be contacted and reports of the impact, conversations and file notes are to be taken. These are to be analyzed and summarized for Management by the supporting admin staff. The notes provision on Rent+ is to be used to facilitate this.

It is expected that staff spend **80% of their time on estates and 20% on administration.**

Each Monday EM staff will report to their respective Regional Office for briefing of the weeks work and to undertake any necessary training that is required or arranged. Monday is also to be used to ensure that all necessary administration is carried out.

Staff Supports

Respond! will ensure that the EM staff have adequate training and are given the appropriate tools to carry out their job to the best of their ability. Respond! will use **innovation in technology.**



Respond! will provide **mobile office functionality** to reduce the reliance on paper system. Respond! will introduce mobile rent accounting and maintenance functionality by **December 2007**. Training and use of the system will be carried out in January 2008 and the systems will be functioning and in use on estates by **February 2008**.

Reporting, Accountability, Work Targets and Appraisals.

Respond! will introduce a programme of staff appraisals and performance reviews over the 3-month period ending November 2007. This will be linked to the new HR+ system being implemented.

There will be **6 monthly reviews** of performance against targets.

All staff will, with their relevant line manager, set **performance targets** based on this strategy and the operational needs of the organisation. This will be done in May of each year and will be subject to review formally twice a year and informally twice a year.

Respond! will introduce a **time sheet system in June 2008** for all CD and EM staff and this will be linked to HR+.

All EM staff are to use **Microsoft Outlook** to record their planned visits and estate clinics and to set up their relevant tasks on the tasks element of Microsoft Outlook.

Regional Managers will review on a random basis the **weekly schedules** of EM staff and review all actions arising from that schedule.

EM staff are to record notes of all visits to Residents and to present those notes to the Admin staff for writing up and analysis on a Monday morning. Regional Managers will review these reports on a **weekly basis**. A proforma notebook with Resident receipt is to be provided for this purpose. This will become part of the mobile IT systems in time.

Line managers are to set **targets annually**, in discussion with EM staff, that ensure delivery of the EM Strategy requirements. These targets are to be **reviewed monthly** by Regional Managers to ensure delivery.

Reporting & Review:

EM Teams to **meet weekly** on a Monday to discuss arrears action, maintenance issues, ASB issues, training issues, problem solving etc.

EM staff and Community Development Officers to **meet fortnightly** to discuss relevant issues on estates and future planning

Fortnightly meeting of Regional Manager and Estate Management Supervisor to discuss the action being taken on estates.

Regional Managers to provide Senior Management Team with a **monthly report** on EM issues including arrears management, letting and allocations issues, Maintenance issues and ASB issues. Adhoc reports required where exceptional issues arise that require Senior Management Team consideration.

Regional Managers to carry out **monthly reviews** of targets.

Line Managers to carry out appraisals on a quarterly basis – **2 formal and 2 informal**.

8 Customer Satisfaction

Relevant Policy and Procedures:

Tenant Handbook 2007

Antisocial Behaviour Policy

Repairs and Maintenance Handbook

Good Neighbour Charter

Objective:

To provide a friendly, accessible and efficient service to residents with a view to best practice on all aspects of customer liaison, whether by verbal, written or other means. To provide feedback on issues raised in a timely manner. To be open and forthcoming in dealings with customers and to provide a means of obtaining satisfaction ratings from customers on the services we provide.

Delivery of this objective:

Informing Tenants:

Tenant communication will take place through the following means:

- **New Tenant Handbook** to be issued to all residents
- **Weekly house visits** by Estate Officers at the outset of the EM Strategy
- **Weekly Estate Clinics** where required.
- **Annual Estate Report** detailing summarising the events of the year for that estate and a look forward to the next year. This will include costs and income of the estate and a summary of the maintenance programme undertaken and planned for that estate including a schedule of the key dates for meetings and planned maintenance.

Respond! will make available a **computer in all Community Buildings** so that Residents can utilize the computers to contact Respond! online. The target for achievement of this nationwide is **June 2009** with a programme roll out from September 2007.

Complaints procedure and response

Respond has a centralized complaints officer, independent of the Estate Management function.

A **register of complaints** will be maintained by each Regional Manager and a **monthly report** of statistics will be provided to the Senior Management Team by Regional Managers.

All complaints will be recorded and timelines for action and replies will be given to the tenant.

Complaints may be written, or verbal and will be **acknowledged within 5 working days**.

All complaints will be **investigated within 20 working days** and a brief summary **report** made to the complainant with **30 working days** where possible. Any complaint not **resolved within 30 working days** will be escalated to the Regional Manager.

Any complaint not resolved **within 60 working days** will be escalated to the Managing Director for resolution.

All complainants will receive notification that the complaint has been escalated within **5 working days** of the escalation.



Commitment to Tenants

The EM staff will meet the following standards:-

- Replies to letters within **5 working days**
- Reply to telephone calls **within 48 hours**
- **Designated number** to contact your Estate Officer
- Rent statements to issue **quarterly**

Measuring Satisfaction

Respond! will undertake an **annual, random sample study, of Residents' satisfaction**. A minimum of 33% of Residents will be sampled each year to measure satisfaction over a given range of items including, rent levels, property maintenance, property condition, service delivery, information and communication and other areas determined by the Senior Management Team. This work will be undertaken by the R & D team.

Respond! will use a **mystery shopper service** to test our front line services and the ability of our EM staff to deliver on their requirements. A specific consultant will be engaged to help deliver this service and will be linked to Community Development activity.

Both of these services will be developed and run through our **Research and Development Team** reporting to the Managing Director.

Resident satisfaction with our maintenance contractors and maintenance service to be carried out on **all maintenance issues**. This is to be achieved by giving a postage paid reply slip to all residents who use our services with a request for reply. **Results to be compiled quarterly** and conveyed to Regional Managers, Senior Management Team and relevant contractors.

Reporting & Review:

Monthly report on complaints received, closed and under review, including analysis of complaint types. Learned outcomes to be relayed to staff on a monthly basis.

Annual Customer Satisfaction survey to be undertaken.

Mystery Shopper service e to report **twice a year** on a regional basis.

Quarterly maintenance service satisfaction rating report to Regional Managers, Senior Management Team and contractors.

9 Ensuring Compliance

Relevant Policy and Procedures:

Tenant Handbook 2007
 Tenant Letting Conditions
 Anti Social Behaviour Policy
 Repairs and Maintenance Booklet
 Rent Arrears Administration Process
 Good Neighbour Charter

Objective:

To ensure that both Respond! and Residents adhere to the agreed best practice principles we will instigate a means of reporting on areas such as rent calculations, arrears management, maintenance completion and quality and resident satisfaction to ensure that compliance is maintained at the highest levels by both EM staff and Residents.

Delivery of this objective:

Respond! will set achievable targets for staff and residents in respect of all critical EM areas of service. As set out above these will be set annually and monitored monthly to ensure delivery.

Reporting on all targets and outcome will include analysis of successes as well as failures. A programme of learning will be built up from this report.

Respond! will issue an **Estate Report annually** to provide details of the work done and expected work in the upcoming year. This will allow Residents and third parties to monitor progress on their estates.

Enforcing maintenance standards

It will be the remit of the National Stock Manager and the Regional Managers to ensure that the cost control and the maintenance standards are kept at a high level.

Quarterly reports will be prepared by the National Stock Manager for the Senior Management Team to monitor the financial costs and qualitative delivery of our maintenance service.

A **national programme of inspections** by the National Stock Manager will be put in place and agreed with the Senior Management Team to enable the National Stock Manager to monitor the level of work on estates and the physical quality of our houses and apartments.

Rent and Arrears controls

Arrears management by the EM staff will be monitored by the EM Supervisors and Finance. EM staff will report monthly to the Regional Managers on the progress of arrears reduction programmes (as set out above).

Arrears will reduce by at least **2% per annum**, nationally. The administration of arrears, reminder letters, 7 day notices and NTQ's will be documented and followed up on a weekly basis by the EM staff.

Regional Managers will report monthly to the Senior Management Team on arrears action plans for estates. These plans will focus on the **10 highest arrears cases** in each estate first and seek to reduce the level of arrears in these cases by **50% in the first 12 months of this strategy**.

Regional Managers will provide an **annual arrears action plan** for the next 5 years on arrears reduction.



Notice to Quit (NTQ)

All NTQ's have to be notified to the Legal Department prior to issue. EM staff must document all NTQ details. Any income received after an NTQ has been issued must be returned to the relevant Resident with an explanation of the process.

Eviction

Eviction will be used only as a **last resort**.

To obtain a successful eviction a clear and continuous file of documentation must be kept. All actions, such as advice and the use of other agencies (MABS, Household Budget) and payment agreements must be maintained.

The EM staff and the legal department to ensure that any case for eviction is actionable.

Anti-social behaviour procedures

Respond! has an Anti Social Behaviour Policy.

Respond! will not tolerate any ASB, as defined in its Policy.

Respond! will help Residents in any way possible to take action to ensure that their lives are not blighted as a result of ASB. This will include mediation, legal action and eviction where necessary.

Where Tenants are willing to come forward and report incidents we will take positive action.

Respond! will also liaise with the relevant 3rd party bodies, e.g. The Gardai etc., to ensure that the case is dealt with in a prompt manner.

Respond! will only seek an Anti Social Behaviour Order where it believes that this is necessary and usually only **as an action of last resort**.

Reporting & Review:

Monthly reports to Senior Management Team by the National Stock Manager on costs and qualitative nature of repair service.

Monthly report by Regional Managers on arrears actions.

Annual arrears action plans for each estate.

Monthly report on NTQ's issued and actioned

Monthly report on ASB issues to be prepared by Regional Managers for Senior Management Team.

Annual Residents report, by estate, setting out repairs and maintenance programmes and issues and any other compliance matters.

10 Administrative, IT and Support Systems

Relevant Policy and Procedures:

Anti Social Behaviour Policy
 Repairs and Maintenance Booklet
 Rent Arrears Administration Process
 Assessment Protocols
 IT Strategy

Objective:

Respond! will provide sufficient professional support services to our front-line estate management staff to enable them to carry out all their functions to best practice standards.

Delivery of this objective:

Administrative support

Support to the front line EM staff will be provided by a dedicated Administrator in each Regional Office. This individual will **support up to 4 EM staff** working on estates.

The Admin support will ensure that **all documentation is filed** and that all correspondence is sent to residents within the required time scales set out above.

The Admin support will ensure that **all processing of arrears action letters and notices** is undertaken in a timely and efficient manner.

The Admin support will prepare necessary, **weekly, monthly and quarterly reports** for consideration by EM staff and Regional Managers.

Admin support will ensure that **all Resident contacts are recorded and analysed each week** and that relevant information is shared within the EM team they work.

The Admin support will provide any **adhoc reports** as requested by the EM staff and the Regional Managers in respect of arrears, NTQ's, maintenance or other areas.

The Admin staff will support the EM staff and the legal department in the **preparation of documentation** and files for all ASB and arrears cases.

IT Support

IT support will be provided by way of **Helpdesk facilities** accessed either on-line or by telephone.

Any issue that cannot be resolved on-line or by telephone will be supported **on site** by a relevant IT assistant.

All front line IT requests will be dealt with within **72 hours**.

IT will provide **mobile office technology by June 2008** to all front line EM staff.

An effective IT rent accounting and maintenance system will be in place by **December 2007**.

IT training will take place at the launch of any new system and there will be **2 Microsoft Office update sessions** (no more than half a day) in each year.

Any IT training request will be supported on an **individual or on a group basis** as considered necessary.



Finance Support

The Finance Team will produce **quarterly rent statements, 1 week after the quarter end** (April, July, October, January). These will be dispatched by the Finance Team.

Rent payments will be up loaded on a **weekly basis** initially, by the Wednesday of the relevant week. Notification of up load will be sent to all EM Staff.

Daily up load of payments will be processed as of **1 January 2008**. No notification will be sent at this time.

Rent will be charged from the **Monday of each week** on all Resident rent accounts.

Refunds of deposits will be made on the **last Friday of each month** where a deposit is to be repaid.

Maintenance reports will be made available **on line** to the National Stock Manager and Maintenance Officers on a **weekly and monthly basis**.

The Finance Team will monitor and report on **monthly arrears figures** to the Senior Management Team. They will not report on action plans or action taken.

Rent accounts will be reviewed by the Finance Team on a **weekly basis** to ensure that all relevant transactions have been processed and that accounts reflect the most up to date position for each tenant.

Finance, working with EM staff will seek to **reduce and eliminate any Rent Suspense account balances** over a period of 6 months and to clear all figures transferred to suspense within **2 weeks from 1 January 2008**.

A **quarterly meeting** will be held with Finance and EM Supervisors to ensure that the most efficient processes and systems are being developed and deployed.

11 Summary of Targets

Target Area	Description	Target
Allocations and Assessments		
Nominations	Interview number of applicants per unit	3 per unit
	Seek Local Authority listing	More than 6 months from handover date.
Applications	Application acknowledgement	Within 5 working days
Assessments		
Assessment	Interviews to be carried out	Within 15 working days
Allocations		
Notification	Notification of successful or unsuccessful application	Within 10 days of decision
Pre/Post tenancy		
Pre Tenancy courses	Number of meetings to be held	Minimum of 5 meetings
	Timescales for meetings	To commence at least 1 month from handover
Casual Vacancies	Period of time in which to fill	4 weeks from notification of void.
Reporting		
	Assessment team meetings	Weekly
	Allocations and assessments reports	Monthly
	Regional waiting list	Monthly
	Allocations and Assessments Policy and procedure review	Every 2 years



Target Area	Description	Target
Management		
Estate Visits	Number of visits	One per week
	Number of Residents to be visited each week	At least 50% to be contacted
Community Buildings	Visits to Community Buildings	Each week
Letting Conditions	Review all properties (visual inspection)	Each week
Good Neighbour Charter	Meeting with residents involved	Monthly
Estate Clinics	To be held in Community Buildings	Monthly
Reporting	Visit schedule to Regional Manager	Weekly
	Visit and issues report to RM	Weekly
	Summary estate report	Monthly
	Community Building usage report	Quarterly
	TPC report and review	Annual

Target Area	Description	Target
Maintenance and repairs		
Maintenance and repairs	Set up of cyclical programme	Annual
	Planned Programme review	Every 2 years
	Costed plans for cyclical and planned programmes	Annually in March each year
	Progress reports on programmes	Quarterly
	Residents' report on programmes	Annually
	Stock inspections	100% each year
Reactive repairs	Response times for:	
	Emergency	24 Hours
	Urgent	72 Hours
	Routine	21 Days
	MO approval	Repair cost < €100
	Regional Manager approval	Repair cost €101 < x < €1,000
	National Stock Manager approval	Repair cost ≥ €1001
	Pre-inspection of repair requests	All ≥ €1,001 and 20% < €1,000
Community Facilities	As per above.	As per above
National Stock Management	Programme of planned maintenance for 5, 10, 20 and 50 years	Reviewed every 2 years
Void Maintenance	Turn around period	2 weeks from notification of void
	Schedule of standard void works	Review annually
Reporting	Void report	Monthly
	Summary Maintenance report	Quarterly
	Cyclical Maintenance review report	Annually
	Planned maintenance review report	Annually
	Estate Communication on Maintenance	Quarterly



Target Area	Description	Target
Financial Management		
Setting of rents	CLSS and CAS rent increases	Annually from 1 July
	Notification for Income Documentation	15 March each year
	Agreement on all rents from Company Treasurer	As needed
Collection of rents	Method preferred	Swipe Card
	Rent collection on new estates	Zero tolerance
	Receipts reminder	On each quarterly statement
	Arrears intervention	2 weeks from first arrears date
	Documentation receipt	1 June each year
	Reduction in arrears	2 to 3% in next 12 months
	Income Documentation arrears	Reduce by 2% in next 12 months
Reporting	EM Team meeting on arrears	Weekly
	EM Supervisor and Regional Manager meeting	Every 2 weeks
	Arrears report	Weekly
	NTQ/7 Day notice report to Regional Manager	Weekly
	Arrears visits to high arrears offenders	Weekly

Target Area	Description	Target
EM Staff		
Recruitment, retention and training	Ration of staff to number of units:	
	Urban	400 units per staff member
	Rural	300 units per staff member
	Admin support	1 per 4 EM staff
	Training per year	Minimum of 6 days per year
Deployment	Object of deployment	Achieve maximum contact with Residents
	Nature of deployment	In estate clusters
	Time on estates	80%
	Time on Administration/Training	20%
	Admin day	Monday of each week.
Reporting	Review of targets	Every 6 months
	Setting of targets	May each year
	Weekly time sheets	June 2008
	Use of Microsoft Outlook Calander	Weekly
	Schedule review by Regional Manager	Weekly
	Use of proforma notebook/review by Regional Manager	Weekly
	Review of targets by Regional Managers	Monthly
	CD and EM staff meeting	Fortnightly
	Regional Manager report to smt	Monthly



Target Area	Description	Target
Customer Satisfaction		
	Estate report by Regional Manager	Annual
	Computer in all Community Buildings	By June 2009
	Complaints register	By December 2007
	Complaints report by Regional Managers	Monthly
	Complaints acknowledged	Within 5 working days
	Complaints investigated	Within 20 working days
	Summary Complaint report	Within 30 working days
	Unresolved complained escalated to Regional Manager	30 working days
	Unresolved complained escalated to Managing Director	60 working days
Reporting	Complaints report from Regional Managers	Monthly
	Customer Satisfaction survey by R & D team	Annual
	Mystery Shopper review	Twice a year
	Maintenance service satisfaction report by Regional Managers	Quarterly

Target Area	Description	Target
Ensuring Compliance		
Maintenance Standards	Report on quality control and costs by National Stock Manager	Quarterly
	National Programme of inspections	Annual
Rent and arrears	Finance to monitor arrears	Monthly
	Arrears reduction programme report to Regional Managers by EM staff	Monthly
	Arrears reduction programme report to Regional Managers by EM staff	2% per annum
	Regional Manager report to Senior Management Team on arrears	Monthly
	Arrears action plan from Regional Managers to smt	Annual
Anti Social Behaviour	Report by Regional Managers to Senior Management Team	Monthly
	Customer Satisfaction survey by R & D team	Annual

Target Area	Description	Target
Admin, IT and Support Systems		
Admin	1 Admin support	Per 4 EM staff
	All documents to be filed	Weekly
	All residents contacts to be recorded and analysed.	Weekly 100%
IT Support	All front line requests dealt with.	Within 72 hours
	Mobile office technology provided	By June 2008
	Effective Rent accounting system	By December 2007
	Microsoft Office update session	2 per year
Finance Support	Quarterly rent statements	1 week after quarter end
	Rent payments uploaded	Weekly
	Mystery Shopper review	Twice a year
	Rent payments uploaded daily	By 1 January 2008
	Rents charged	Monday of each week
	Refund of deposits	Last Friday of each month
	On line maintenance reports	Weekly
	Review of rent accounts	Weekly
	Reduce rent suspense	Over 6 months
	Clear rent suspense thereafter	Within 2 weeks
	Finance EM meeting	Quarterly



12 APPENDIX

ESTATE OFFICER WEEKLY PROGRAMME

1. Introduction

The objectives of this deployment template are to ensure better customer service, better use of available resources, enhanced information flows between Estate Management, Community Development and Family Resource and to give Estate Officer a clear direction of what is required of them under the new Estate Management Strategy.

2. Functions

Estate Management main functions include:

- Arrears Control
- Enforcement of Instalment Agreement
- Maintenance Repairs (Planned and Reactive)
- Void Inspections
- Signing up new tenants
- Environmental Programmes
- Management of Community Areas
- Maintenance of Community Buildings
- Pre-tenancy Programme Delivery
- Reducing vandalism and graffiti
- House inspections
- Identifying neglect – families in need of support
- General tenancy support

3. Cluster

Sample Cluster– Kilkenny /Tipperary

Please Note: This Sample and the following Deployment chart will need to be interpreted and applied appropriately in each region, taking account of the particularities that may obtain. However, it is essential, over the next six months, that all residents in every region are visited by one of our Estate Officers every week and the visits duly recorded as set out hereinafter. At the end of this period there will be a review of the process.

10 Estates – 248 units

Tipperary

Group 1

Commeragh Court	17
Francis Court	2
Oakland Drive	38
Ardfinnan	32
	<hr/>
	89

Group 2

Killinaule	18
Cahir	17
Fethard	19
	<hr/>
	54

Kilkenny

Millenium Court	46
O'Loughlin Court	46
Goresbride	13
	<hr/>
	105

4. Deployment

- Monday** – Office – Planning Programme
- Tuesday** – Tipperary – Group 1 Estates
- Wednesday** – Tipperary – Morning: Group 2 Estates
Afternoon: Focus on arrears control, or particular estate management programmes
- Thursday** – Kilkenny Estates
- Fridays** – Forward Planning for existing and new estates
- Take any TOIL (time off in lieu) due
 - Attend meetings with Local Authorities, Third Parties and attend bi monthly Liaison Meeting with opposite number in Community Development/Family Resources etc.

5. Outcomes

Each Estate Officer will carry out a Recording Register (duplicate book) to record:

- Complaints
- Repair queries
- Contact from unanswered calls
- To note areas of concern & follow up
- Record incidents of anti-social behaviour
- Receipts for payments of rent/arrears
- House or estate maintenance issues

Record Book will provide the basis for a weekly review by line Manager.

Record book and visits will also act as:

- 1) A resource of information for Community Development and Family Resource Officers
- 2) Focus Service Provision
- 3) Improve Management of Estates and increase support for tenants
- 4) Provide better flow of information between sections
- 5) Increase tenant satisfaction
- 6) Increase tenant inclusion
- 7) Improve personal and professional relationship between tenant and Estate Officer







Respond! Housing Association,
Airmount,
Dominick Place,
Waterford.

Lo-call: 0818 359701
Web: www.respond.ie
Email: info@respond.ie