

## Response and action plan to Waverley Scrutiny Report Re Mutual Exchanges

The report identified 20 recommendations that have been grouped together in **IT**, **process** and **communication** workstreams.

Rec No	Recommendation	Response/action	Assigned Officer	Timescale	Progress/outcome
1	The Policy document dated 2016 July needs to be updated. We understand this is in hand.	<ul style="list-style-type: none"> <li>▪ Agreed</li> </ul> <p>Agree policy review required to incorporate group's views</p>	AH	December 2018	<p>Draft Policy presented to November Housing O&amp;S</p> <p>Updated Policy to be presented to February Housing O&amp;S</p> <p><b>In progress</b></p>
2	To put in place a Case Management System. We understand this is now in operation.	<ul style="list-style-type: none"> <li>▪ Partially agreed to investigate possibilities</li> </ul> <p>To consider if m/ex cases should be on current Orchard case management system.</p>	AH	January 2019	<p>Mutual Exchange case file type with actions and sub actions created to manage applications</p> <p><b>Completed</b></p>
3	To provide clear guidance on what safety certificates are required and who is responsible for providing them.	<ul style="list-style-type: none"> <li>▪ Agreed</li> </ul> <p>To include in review of process. Identified electric, gas, asbestos, EPC certs to reflect new tnt info to implement with immediate effect.</p>	LD	End November 2018	<p>Process updated certificates shared with prospective incoming tenant(s)</p> <p><b>Completed</b></p>

4	The Orchard mutual exchange system needs to be simplified to make the system work efficiently, but we do not think that a separate bespoke system not using Orchard, is an answer.	<ul style="list-style-type: none"> <li>Agreed</li> </ul> <p>To review current process</p>	AH	January 2019	Case work process developed  <b>Completed</b>
5	New technology needs to be encouraged and used effectively and link to Orchard in all areas.	<ul style="list-style-type: none"> <li>Agreed</li> </ul> <p>To review current process. Group encouraged digital services for staff and tenants</p>	AH	January 2019	Ongoing development of online forms for tenants and officers  <b>Completed</b>
6	The Web site needs to be updated, made more welcoming, informative and user friendly to encourage more mutual exchanges and to visit the Harlow Council Website.	<ul style="list-style-type: none"> <li>Agreed</li> </ul> <p>Communications Review Workshop held 3 October agreed more detailed communications and information to promote and support mutual exchanges, to ensure tenants fully aware of process and requirements from beginning.</p>	AH	December 2018	Draft text developed to go live end January  <b>Completed</b>
7	To provide literature in the form of a leaflet on mutual exchanges giving clear details of how to report a repair, detailing what to do if any repairs, or clearance, noted on the inspection survey as the previous tenant's responsibilities, have not been carried out.	<ul style="list-style-type: none"> <li>Agreed</li> </ul> <p>As action 6</p>	AH	December 2018	Information on website and process details contained within correspondence  <b>Completed</b>

8	The Disclaimer, at the bottom of the Inspection survey, needs to be reworded as it says that it is the responsibility of the outgoing tenant for any repairs. Waverley as a landlord are equally responsible for Health and Safety repairs and confirm the legality of the Disclaimer.	<ul style="list-style-type: none"> <li>Agreed</li> </ul> <p>Reviewed and updated to be included on revised user guide</p>	LD	End November 2018	New form developed <b>Completed</b>
9	To look into broadening the avenues for people seeking information on mutual exchanges apart from the internet.	<ul style="list-style-type: none"> <li>Agreed</li> </ul> <p>Ad hoc advice currently given re notice boards, Facebook - information to be included in tenants communications and process documentation</p>	AH	End November 2018	HCST, T&E officers give other advice. Additional ways to find home exchange included in new webpages <b>Completed</b>
10	Joint visits to be undertaken by the Stock Surveyor and T & E inspectors and both informed of who the tenants are exchanging with.	<ul style="list-style-type: none"> <li>Partially agreed to investigate possibilities</li> </ul> <p>Included in review of process. Not cost effective to carry out joint visits. In/outgoing tenants receive repairs report of work to be completed by tenant</p>	LD	End November 2018	Clear advice and responsibilities to tenants by phone, email and letter. <b>Completed</b>
11	To provide both mutual exchange tenants with copies of all the inspection reports, including the EPC, within 24 hours of the inspection and where relevant the forms to provide	<ul style="list-style-type: none"> <li>Partially agreed to investigate possibilities</li> </ul> <p>To include in review of process. To provide info but 24 hours not may not</p>	LD	End November 2018	New process rolled out

	detailed information on Decent Homes work that has been or when this work will be undertaken.	be workable. To ensure clear timeline and accountability.			<b>Completed</b>
12	All paperwork to be scanned within 24 hours of receipt.	<ul style="list-style-type: none"> <li>Partially agreed to investigate possibilities</li> </ul> <p>To include in review of process. To review SLA with scanning and HCST capacity. To consider online forms to reduce need for scanning</p>	LD	End November 2018	<p>Ongoing development of online forms to reduce need for scanning</p> <p><b>Completed</b></p>
13	All letters to be produced from Orchard, to be reviewed and be consistent This we feel is a fundamental issue in the mutual exchange process.	<ul style="list-style-type: none"> <li>Partially agreed to investigate possibilities</li> </ul> <p>To include in review of process. Aim for all template letters to be held on Orchard to investigate feasibility. Group agreed consistent letters could be held on most appropriate system.</p>	AH	January 2019	<p>New letters attached to Case management work stream</p> <p><b>Completed</b></p>
14	To train T & E inspectors and Rent staff to provide cover for staff when on leave or sick, to address any stoppage in the mutual exchange process.	<ul style="list-style-type: none"> <li>Partially agreed to investigate possibilities</li> </ul> <p>To include in review of process. Property services to provide technical cover for Surveyors absence. Consider bringing forward inspection in two weeks of application. Link to action 10</p>	LD	End November 2018	<p>Property Services to recruit additional Surveyor and inspection brought forward in process.</p> <p><b>Completed</b></p>
15	To provide reports that are meaningful and provide information on how the mutual exchange process benefits the tenant and Housing	<ul style="list-style-type: none"> <li>Agreed</li> </ul> <p>To include in review of process. To develop reports for to monitor performance inc applications, active</p>	AH	January 2019	<p>Ongoing development of Case Management system reporting</p> <p><b>Completed</b></p>

		searching, exchanges, appointments made and kept, time taken and satisfaction			
16	To carry out necessary reference, financial and fraud checks are, to confirm suitability for an exchange, before the application forms are sent out.	<ul style="list-style-type: none"> <li>▪ Partially agreed to investigate possibilities</li> </ul> <p>Unworkable as no contact details. To provide advice and information pre applications stage so applicants self select / check eligibility.</p>	LD	End November 2018	Advice online for applications to self select / check eligibility  <b>Completed</b>
17	To investigate the provision of a brochure explaining the advantages and disadvantages on moving to Senior Living Accommodation.	<p>Moat Lodge leaflet with Communications for review (could be generic) – to get commitment for publication date.</p> <ul style="list-style-type: none"> <li>▪ Agreed</li> </ul>	DB	End November 2018	Text agreed to launch in Spring with photos. Website pages updated  <b>Completed</b>
18	To have twice yearly open days at Senior Living Accommodation schemes.	Agreed in principle but to manage capacity and resources proposed rolling programme of open events March to October (avoiding winter months). Pilot event 31 October at Moat Lodge.	DB	End November 2018	Agreed – <b>completed October</b>
19	To target 50+ tenants who are living in under occupied properties.	Target invitations to open events, home exchange event and leaflet. Senior Living Officers received target list of residents in their area who may require assistance in moving.	DB	End November 2018	Agreed – <b>completed October</b>
20	To advertise in Homes & People, where the Senior Living Schemes are, along with contact details.	Advert in Autumn edition of Homes and People scheduled with open invitation to visit schemes	AH	End November 2018	Agreed – <b>completed October</b>