

Strategic Theme	High Level Action	Diversity Focus Sub Action/s	Desired outcome	Outcome measure if applicable	Lead Officer	Support Officer	Start Date	Progress to Date	Deadline Date	Is Progress Red, Amber or Green?
<b>One - Income collection is a 'One Team' priority</b>	Ensure all frontline teams are utilising key information available on Civica CX effectively during their contact with customers.		Contact with customers is utilised by wider services to check Civica CX account/arrears information resulting in referrals to income teams	Number of positive contacts with customers in arrears	Leanne Merga	Carl Platt / Natalie Foley	Nov-23		Mar-24	
	Contribute to Civica CX Continuous Improvement Group	Ensure that CX generated communications and My SHG portal are accessible	Benefits of new system to both customer and SHG are fully realised.		Karen Devine	Christian Hartley	Nov-23		Sep-26	
	Ensure other services are best supporting the collection of commercial income for their area of business.		Service areas jointly own and are effectively involved in helping to maximise income collected for their budget area.	Value and number of aged debt invoices outstanding over 30 days	Leanne Merga / Karen Devine	Relevant Budget Managers	Oct-23		Sep-24	
	Review and input into any SHG policies and procedures that may negatively impact income collection.		Policies are updated to reduce or remove any negative impact on income collection.		Gemma Bullock	Leanne Merga	Jan-24		Dec-24	
	Contribute to ensuring that housing stock managed by SHG is best used. With particular focus on customers under-occupying and vacant tenancies.		Increase in number of properties available for those in need and reduction in lost rental income.	No of customers affected by under-occupancy deductions. Rent arrears transferred to former tenancies	Christian Hartley	Leanne Merga / Gemma Bullock / Rebecca Cullen / Emma Crick / Geoff Binns	Oct-23		Sep-26	
	Broaden commercial awareness of subsidiary business plans.		Customer Finance Service better prepared to respond to any new income collection requirements from group businesses.		Christian Hartley	Karen Devine	Oct-23		Sep-26	
<b>Two - Effective, accessible and holistic advice and support is in place to maximise the prevention of arrears, tenancy sustainment and improve the financial resilience of customers</b>	Ensure that effective plans are in place to proactively support customers on legacy benefits being migrated over to UC.	Ensure that any actions planned consider impact of migration on those with vulnerability, access or mobility issues	Those customers most vulnerable to UC switch are identified and supported to manage claim and maintain rent payments.	Average arrears on new UC claimant accounts that have migrated	Gemma Bullock	Lauren Thorpe	Oct-23		Sep-26	
	Ensure that SHG advice services provide effective holistic support to customers.	Ensure that advice services are equally accessible to all customers	Advice routes and SHG customer's experience around obtaining advice is accessible, efficient, and effective.		Leanne Merga	Gemma Bullock	Oct-23		Sep-24	
	Contribute to local cost of living support plans.		SHG Advice services part of local support plans and customers are able to access wider support available locally.	No of SHG customers accessing Household Support Fund schemes	Christian Hartley	Gemma Bullock	Oct-23		Mar-24	
	Work with SMBC to review and update their Discretionary Housing Payment Policy.		Increasing numbers of SHG customers are able to meet criteria for financial support payments.	No of SHG customers with successful DHP applications	Gemma Bullock	Andrea Griffiths	Oct-23		Mar-24	
	Ensure customers are supported with rent and service charge increases.		Available discretionary payments and hardship fund schemes are well managed and targeted to those most in need.	Arrears as a % of debit & % of rent collected	Leanne Merga	Gemma Bullock	Oct-23		Sep-26	
	Monitor demand and ensure Money Advice service resourced appropriately.		Team are able to respond effectively to increases in demand and carry out pro-active targeted support.	Average wait times for advice. No of appointments / Value of income gains	Christian Hartley	Gemma Bullock	Oct-23		Sep-26	
<b>Three - Customer data and insight is utilised to maximise customer access and engagement with income collection and money advice services</b>	Use data in income collection processes to predict behaviours.		More efficient and effective use of resources with interventions targeted based on identified risks.		Christian Hartley	Leanne Merga	Oct-24		Sep-26	
	Use data to tailor engagement methods based on individual's preferences.		Optimised engagement levels with an increased proportion of contact attempts resulting in positive contact.		Christian Hartley	Leanne Merga / Karen Devine	Oct-24		Sep-26	
	Respond to findings and outcomes from Sheffield Hallam Holding on to a Home research project.		Action plan developed and delivered based on feedback from research surveys and interviews		Christian Hartley	Leanne Merga	Feb-24		Jan-25	
	Review if rent free weeks should continue.		Informed decision made based on customer feedback.		Christian Hartley	Leanne Merga	Apr-24		Dec-24	
Consult with customers on effectiveness of communications used by Income and Advice Services.	Ensure that customers with communication needs are consulted	Suite of clear, effective, multi-channel communications in place that increase likelihood of triggering desired outcome (eg. Contact/payment).		Christian Hartley	Leanne Merga / Karen Devine	Jan-24		Dec-24		

<p><b>Four - Digital technology and transformation is embraced to deliver a high performing, efficient and cost-effective income collection service across SHG</b></p>	Continually develop and improve Civica CX income collection processes post Go-Live		Benefits of new systems maximised for income collection processes.		Christian Hartley	Karen Devine	Nov-23		Sep-26	
	Develop statement of requirements for future digital arrears monitoring and automated outbound contact solution.	Ensure that vulnerable customers are not receiving unnecessary automated contact	Solution procured and implemented that meets the stated requirements.		Christian Hartley	Leanne Merga	Oct-23		Mar-24	
	Review frequency and distribution of rent statement mailings.		Informed decision made based on customer feedback, value for money and legal requirements.	Postage and printing costs	Christian Hartley	Leanne Merga	Oct-23		Apr-24	
	Review cost effectiveness of Direct Debit discount		Informed decision on whether to withdraw offering Direct Debit discount incentives on some or all account types		Christian Hartley	Leanne Merga	Apr-24		Mar-25	
	Renegotiate long term water collection agreement beyond 2025 & obtain Board/Council approval for 12 months extension of contract		Long term collection agreement in place until 2030.		Christian Hartley	Karen Devine	Oct-23		Mar-25	
	Re-procure contents insurance scheme, collect premiums on CX and introduce Direct Debit payment method for payment of contents insurance premiums.		Contents Insurance Scheme procured which provides best available cost and cover to customers with policy details and premium payments administered on Civica CX.		Karen Devine	Christian Hartley	Jul-24		Dec-24	
	Introduce tablet devices for officer visits.		Team able to access real-time information and update Civica CX accounts while carrying out visits.		Karen Devine	Carl Platt / Natalie Foley	Oct-23	Dec-23		
	Use Robotic Process Automation to carry out additional process across the team where there are clear benefits. (Such as new agreement/account set ups on Civica CX).		Reduced costs and resource required to carry out data entry tasks across team.		Karen Devine	Monica Quintero	Jan-24		Sep-24	
	Develop real-time Customer Finance performance dashboard.		Key performance information available in real-time, clearly displayed and accessible to relevant people.		Christian Hartley	Alison Leach	Oct-23		Mar-24	
	Introduce Power BI Performance reporting into Customer Finance Team		Ability to quickly create reports within the team to target interventions and analyse arrears trends.		Christian Hartley	Karen Devine	Jan-24		Jul-24	
Make decision on best IT Platform for collecting Private Sector rents.		Decision made on whether to move collection of Private Landlord income onto Civica CX		Karen Devine	Christian Hartley	Apr-24		Dec-24		
Review Debt Advice and Exchequer Services SLA with SMBC.		Value for money agreements in place and where appropriate service delivered in-house.		Christian Hartley	Leanne Merga	Jan-24		Mar-24		
<p><b>Five - Motivated, engaged and highly skilled staff, recognised as the Best Collection Team in the sector</b></p>	Develop engagement plan for the Customer Finance service based on latest survey responses.		3 Star Best Companies engagement score retained for team.	Best Companies Survey Scores	Christian Hartley	Leanne Merga	Oct-23		Sep-26	
	Pro-actively seek and make applications for relevant awards.		Award obtained which recognised SHG's approach to Income Collection or Money Advice.		Christian Hartley	Leanne Merga / Gemma Bullock	Oct-23		Sep-26	
	Review and improve comprehensive induction and training resources for new starters/movers. Incorporating training and resources developed around Civica CX.		New team members are quickly and consistently working to expected levels.		Leanne Merga / Karen Devine	Natalie Foley / Carl Platt	Oct-23		Dec-24	
	Review how Welfare Benefit training is delivered to wider teams following loss of in-house training resource.		Training on UC and other Welfare Benefits continues to be delivered.		Gemma Bullock	Jade Whittle	Oct-23		Apr-24	
	Retain high quality staff, plan for succession and ensure effective leadership across the team.		Reduced turnover of staff and increased levels of engagement.	Best Companies Survey Scores/ Staff turnover numbers	Christian Hartley	Leanne Merga / Gemma Bullock / Karen Devine	Oct-23		Sep-26	