

Stockport Council and Stockport Homes Group

Independent housing review – full report

December 2024

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Section 1: Introduction and approach

1. Context of this review

Stockport Metropolitan Borough Council (SMBC) commissioned Deloitte to undertake an independent review of its housing management arrangements, and to review the interaction and alignment between SMBC and Stockport Homes Group (SHG) in delivering the One Stockport Borough Plan. The review was triggered by a full council resolution seeking to review the arms-length management organisation (ALMO) model against a backdrop of regulatory and financial changes, and a desire to consider the best approach for residents.

Established in 2005, SHG currently maintains responsibility for the management of Stockport's housing stock (c.11,500 homes) across the borough. Originally established for a period of 10 years, the existing approach was reconfirmed with a 27-year agreement in 2014 following an options appraisal and tenant consultation. SHG provides services across the borough, which fall within its remit and direction given to it by its approved articles. This is outlined in Appendix 1:

The purpose of this review is to identify areas of existing strength, opportunities for efficiencies and improvement, and to provide a view as to whether these can be addressed effectively within the current ALMO model or whether closer working, or even integration, would provide greater assurance of delivery. Five key themes have been identified to structure the findings and recommendations throughout this report:

1. Strategic direction
2. Governance and scrutiny
3. Performance and delivery
4. Ways of working
5. Data and insights

2. Approach to this review

An independent review was conducted over a seven-week period. Findings and insights were shared throughout with senior stakeholders at both SMBC and SHG to continuously validate accuracy. Leaders in both organisations prioritised time for this review and are strongly invested in its findings.

Desktop analysis: Over 100 documents and datasets were reviewed, with focus on critical strategic and operational documentation to accurately understand key information. Documents included the One Stockport housing plan, Stockport housing partnership's annual report, SHG's delivery plan, council budget reports, and relevant scrutiny committee reports. Performance metrics were examined alongside customer satisfaction scores and financial data from sources such as SHG's year-end performance report, and the capital programmes outturn report. A full list of the documents reviewed is set out in the Appendix 3.

Stakeholder engagement: More than 70 stakeholders were engaged with during the review to ensure a breadth of perspectives was understood. This included: 10 tenants, 13 members, 21 council officers, 23 SHG staff, 4 SHG board members and one partner agency (Greater Manchester Police). Engagement methods included:

- **Member interviews:** All five council group leaders and some of their colleagues were interviewed to understand their perspectives on housing priorities for residents. This included the Leader and the lead cabinet member. All five groups were highly engaged with this review and their commitment to wanting the best service for their residents was evident.
- **SMBC officer interviews and focus groups:** Interviews with council officers, including the chief executive, deputy chief executive and CLT, took place. Focus groups with staff across SMBC were held to understand the strategic alignment and operational interdependencies between housing and other council functions. Senior leaders were open about the challenges and reflective about the actions they could take.

- **SHG focus interviews and focus groups:** Interviews were held with all of the SHG executive leadership team and a focus group was held with four board members. Site visits were conducted with a senior manager and two focus groups were facilitated with managers and frontline staff. Everyone engaged with demonstrated commitment to delivering the best services for tenants and all demonstrated pride in SHG's achievements.
- **Tenant feedback:** Tenants and residents are at the heart of this review. A large amount of data was already collected on the tenant experience, so the original brief did not include provision for a representative independent survey of tenant perspectives. Instead, to ensure that tenant views shaped the review findings, the review sought to assess existing tenant feedback and validate this through interviews with a small number of tenants who were identified by group leaders as being able to provide insight from their experiences and with a focus group with SHG tenant representatives.

Comparator analysis: Analysis to identify best practice and benchmark SHG's performance also took place. HouseMark data comparing tenant satisfaction measures (TSM) and wider corporate housing KPIs was used to support desktop analysis and stakeholder engagement; an interview with the Chief Executive of Derby Homes, a similarly high-performing ALMO, also took place to understand how they have strengthened the local authority / ALMO relationship. Derby Homes was identified as a suitable comparator for this exercise due to its relative proximity to Stockport, its experience with review processes, and the fact that it is seen as a peer of SHG in terms of consistently high performance in top quartile of ALMOs.

3. Strategic context of the housing sector and challenges facing Stockport

As is the case across the country, Stockport continues to face significant housing challenges. There is a national lack of supply of quality social housing, there have been significant changes made to rent policy over recent years (which has had a detrimental impact on the housing revenue account (HRA)) and there are increasing regulatory requirements. This includes the Regulator of Social Housing and new consumer standards, the increasing powers of the Housing Ombudsman Service and the requirements of the Building Safety Regulator.

More locally, as highlighted in the 2019 housing needs assessment, key challenges include the delivery of required housing quantity and mix, meeting housing needs for older residents, and ensuring that new developments meet the specific needs of different housing market areas within Stockport. Public services of all kinds are seeing increased demand. The index for multiple deprivation (IMD) 2019 ranks Stockport as the 136th most deprived local authority area in England (out of 317), although the least deprived borough in Greater Manchester. The borough has several deprived areas; Brinnington currently ranks in the top 2% of deprived areas nationally. 38.7% of people aged 16 and over are also currently economically inactive, with an estimated 30,000 low-income households across Stockport and 36,400 people living in poverty. Demand for social housing outstrips available properties following years of under-investment in all forms of social housing.

The current asset management strategy (2023-2028) places emphasis on maintaining decent home standards and contributing to net zero ambitions. At the time of writing that strategy, to maintain decent homes standards, a funding gap of £147m was anticipated by 2033, with the prioritisation on this expected to limit the council's ability to hit net zero ambitions by 2038. Recent rent policy announcements, with the government confirming rent increases of CPI+1% for at least five years from 2025-26, means the funding gap has significantly reduced. However, it is clear HRAs across England still face pressures to afford all the demands placed on them. A new asset management strategy will be developed during 2025.

Other characteristics relating to the borough that further emphasises the need for effective management of existing council housing stock include:

- **High home ownership:** Current owner-occupied housing across the borough is significantly higher than the national average (72% compared to 64%) and the private sector rental has grown significantly, with average rents reaching £1,008 in September 2024, a 14.5% increase on September 2023.
- **Rising homelessness:** Significant increase in homelessness has been experienced across Stockport, with a 35% increase in homeless presentations since 2021/22. This is a national issue being faced by many councils.
- **Housing benefit subsidy loss:** The absence of appropriate compensation to cover the cost of rent is continuing to place financial challenge on SMBC, with local housing allowances rates not keeping pace with market prices, continuing to add pressure. This, again, is a national issue.
- **Ageing population:** Stockport currently has an ageing population (higher than the GM average), further necessitating the need to align housing requirements that are suitable for population demographics.

The Grenfell Tower tragedy increased scrutiny of the social housing sector overall and led to significant changes in the regulatory and compliance landscape for housing providers. This is particularly relevant for Stockport given the presence of 22 tower blocks. New consumer standards were introduced by the Regulator of Social Housing earlier this year, with tenant satisfaction measures (TSMs) having to be collected and submitted to the regulator, resulting in increased scrutiny and reporting for all housing providers, including the council and SHG. Financially, there are numerous conflicting demands on resource expenditure within the housing revenue account (HRA), with potential gaps in funding over the longer term to meet decent homes standards (DHS) and delivering the wider ambitions of SHG's asset management strategy.

SHG demonstrates strong performance across its core services despite an increasingly challenging backdrop. As is the case with all organisations, there are opportunities for improvement; engagement with members highlighted pockets of lower performance that have not yet been adequately addressed and the need to adopt a more collaborative approach to solving these issues. Given the challenges facing the social housing sector, it is critical that SMBC identifies and implements the most efficient approach for housing management, maximising resources and continuing to provide the best possible outcomes for the residents of Stockport.

4. Context of the ALMO approach and model

The emergence of the first ALMO took place in 2002 in response to the introduction of DHS by government, to provide operational focus to implement DHS without being responsible for wider council objectives. A surge in the number of ALMOs across England subsequently followed during the early 2000s, however ALMO closures began to accelerate following the recession in 2008. Austerity, financial viability, reduced HRA funding and a desire for greater control over budgets were key contributors to ALMOs being brought back in-house. In most cases, the ALMOs that were brought back in house were not highly performing and there are few examples of sustained performance improvement following ALMO integration back into the council. Although there are areas of development for SHG in how they deliver housing for SMBC, the integration of the ALMO back into SMBC is not viewed by this review as the default solution, given SHG's existing high performance.

Section 2: Headline findings and next steps

Headline findings

Deloitte was commissioned to undertake a full, independent review to help determine the right model for managing Stockport's housing stock, given legislative and regulatory changes that have taken place and the financial challenges facing the housing revenue account (HRA). The review included considering whether the ALMO model continued to be the right one for Stockport.

Overall operational performance by Stockport Homes Group (SHG) is **strong** when compared across the sector. Analysis of key data, including tenant satisfaction measures (TSMs) and value for money (VfM) benchmarking has emphasised SHG as a high performing ALMO when compared to other ALMOs and housing providers. These positive metrics provide a foundation for continuing to maximise performance in terms of overall tenant satisfaction, repairs and maintenance, ASB, and other core measures.

Notwithstanding strong operational performance, the review has highlighted concerns about disparity in performance levels in some neighbourhoods, evidenced by member casework, and the need for improved joint focus on tackling the key housing challenges Stockport faces and for improved governance arrangements to give members more involvement in influencing the housing agenda.

The overall recommendation is to retain the current ALMO arrangements and to address the changes required to meet strategic challenges within this model. The model itself is not a cause of the issues identified in this review and retaining the ALMO model while addressing the improvements will make the best overall use of resources.

Overarching takeaways

SHG's overall performance

Overall performance for tenants delivered by SHG is positive. Analysis of key data, including TSMs and VfM benchmarking, reinforced by wide stakeholder engagement, has emphasised SHG as a high performing ALMO within the social housing sector. These positive performance metrics provide a platform to continue maximising performance in terms of overall tenant satisfaction, repairs and maintenance, ASB, and other core measures.

The ALMO model

Challenges and areas of development would not be resolved by a change to the overarching ALMO model. Given the findings from this review, and that many of the challenges focus on enhancing or tweaking existing structures, it is not recommended that SHG is taken back in-house by SMBC. Bringing a service of this scale and complexity back in house runs the risk of undermining current high performance, will be costly with limited benefits, could lead to loss of talented and experienced staff and will distract focus and attention away from the strategic challenges. Furthermore, bringing the service back in-house does not guarantee improved performance in the short-term; analysis of other ALMOs shows that when they are brought back in-house, it rarely results in improved performance, and particularly so when the ALMO is operationally high performing. Most evidence points to a deterioration in service when brought back in-house, with many of those returned ALMOs then failing consumer standards where they have been previously high performing ALMOs. This should be caveated however as a different approach may be required if future government funding regarding Decent Homes / CAN gaps aligns to certain delivery vehicles being in place.

The relationship between members, SMBC officers and SHG

There are many opportunities that are spread across both SHG and SMBC, not just one organisation. To deliver effectively for Stockport there needs to be better alignment between SMBC and SHG in vision,

strategy, culture and operations. Members need to feel that they have the appropriate mechanisms to influence this process. **The priority going forwards should be to reset the arrangements between SMBC & SHG, bringing SHG closer towards *the Stockport family***, and building upon good operational performance, whilst increasing the focus and drive on preparing for the strategic challenges facing Stockport.

Key next steps to progress forwards

- 1. Review recommendations and develop a jointly agreed action plan to take forwards.** Given the number of recommendations and the need to continue focus on core delivery, individual recommendations will likely need to be reviewed and prioritised into an action plan. This should include owners from both SHG and SMBC, a summary of key actions and a timeframe for delivery. Members should also be given the opportunity to review the report and provide their feedback.
- 2. Embed appropriate change monitoring methods for tracking progress.** Building on action plans for priority areas, it is recommended monitoring and reporting of progress is agreed from the outset to maximise accountability across change owners. Monitoring and reporting activity should be delivered to both SMBC and SHG.

Section 3: Strategic direction

1. Overview and context of strategic direction

To deliver quality services there needs to be a clear strategy and vision from which a ‘golden thread’ can be established all the way to effective operational delivery of services by front line staff. For staff to feel empowered and to value the quality of the service they provide, they need to understand the aims and objectives of the services they are carrying out.

Within an ALMO model, the ALMO delivers housing services on behalf of the council, which itself has a wider remit for service delivery to residents. The ALMO works within the strategic direction of the council whereby the council sets out what it is trying to achieve and how the ALMO contributes to the delivery of this ambition. Strategic direction encompasses the overall objectives for an organisation, the documented strategy for delivering these objectives and the overarching leadership and management of these strategic objectives.

2. What is currently working well and existing strengths in strategic direction



Strategic leadership

The SHG board contains a breadth and depth of experience alongside technical expertise. The development and evolution of SHG’s services (expanding services that bring in income or contribute to local communities) has led to experts from a range of industries being present on the board, providing their expert guidance and scrutiny.

Although SMBC sets the overarching strategic direction of SHG (as per the ALMO arrangement), the SHG board takes an active role in setting SHG’s mission, aims and values. This provides a framework for SHG’s activities across key services, including the development of subsidiary plans and strategies that have been key in responding to challenges in recent years. Approval for the business plan is also required from the SHG board.

The SHG board undertakes its responsibilities in line with an agreed governance framework, adhering to the National Housing Federation (NHF) code of governance. Self-assessments to monitor alignment take place, demonstrating positive application of key strategic documentation and frameworks as part of their commitments. Engagement highlighted the practical application of these reviews, for example, with a new process launched for board member appraisal in 2023.



Strategic documentation

Analysis of documentation provided by SMBC and SHG shows a range of different documentation in place. There is clear overarching and up to date documentation and the table below summarises the key strategic direction and plans. It is clear how important SHG is in helping the council achieve its priorities, as part of the wider Stockport family.

Document	Key inclusions
One Stockport: our vision for 2030	Sets out the vision and ambitions of the borough through One Heart, One Home, One Future. Places emphasis on housing and the importance of a collaborative approach for creating thriving places; shows the importance of the role of SHG as part of the Stockport family
SHG delivery plan (2021-2026)	Outlines the five-year plan for SHG service delivery as outlined in the management agreement. Developed in collaboration with SMBC, with six key aims that ultimately aim to provide the best quality services to tenants. Annual outcome reports linking to the plan are developed and reported to SHG board and the council’s scrutiny committee. A mid-term review is undertaken with the council halfway through the five-year term. This was completed during 2024 and approved by SHG board and the council’s scrutiny committee.

Council plan 2024-2027	Considers the wider commitments of SMBC on regeneration to deliver on its strategic aims. The document reinforces the importance of housing in wider place creation.
SHG asset management strategy 2023-2028	The required actions to maintain and develop housing stock across the borough whilst also recognising the challenging landscape SHG operate within and the increased regulatory and compliance requirements in relation to long-term stock investment needs. The document provides critical context for the delivery of services when considering the required standards for decent homes and statutory health and safety compliance.

What isn't working so well and areas for development in strategic direction

Strategic direction and focus

There are varying views about how 'arms-length' the ALMO should be. SMBC has a good sense of what their ambitions are for housing in the borough, but the processes for translating these into clear actions for SHG could be improved. Both organisations need to work closer together to tackle the strategic challenges facing Stockport.

SHG is delivering services as per the agreed articles of association and the objects contained within those. The growth of services since the ALMO was first formed has partially been at the request of SMBC who transferred services over to SHG as a result of continued financial pressures and partially through SHG's own ambition to generate income to fund other services or contribute more holistically to local communities. The increased scope of activity has led to a perception that some SHG services are outside the remit of a housing management provider and may distract SHG's leadership from delivering housing services. SHG needs to be able to describe what would be lost to Stockport if they no longer delivered these services; they also need to provide confidence that they are best placed to deliver these services, that they don't detract from operational housing delivery and that they don't negatively impact the charitable/voluntary sector in Stockport.

Leadership representation

There is little appetite from the council for members to be present on the SHG board, but members do want to exert greater influence on the strategic direction and decision making of SHG. Typically with most ALMOs, around a third of board members are from the council. SMBC needs to consider how to create mechanisms by which members can be closer to strategy setting and have closer ties overall with SHG. This would enable members to share their views and be assured these are being taken on board as they are with any other council function.

3. Recommendations, outcomes and next steps for strategic direction

There is opportunity for SMBC to be less ‘arms-length’ when it comes to strategic direction and to reset the way in which they provide strategic direction to SHG, making sure there are clear priorities to guide SHG’s operational activity and prioritisation. A collaborative approach centred around partnership working needs to be at the heart of how strategic direction is provided.

Area aligned to	Description	Owner	Proposed steps
Recommendation 1: SMBC to facilitate a review of the current management agreement that is currently in place with SHG, developing a newly defined agreement that has regular reviews built in.			
Outcome: This will help to reset the relationship between SMBC and SHG, with clearer roles and responsibilities, to facilitate a new way of working agreement that allows both organisations the ability to respond flexibly to future challenges.			
Strategic leadership and strategic documentation	<p>Reset the relationship, establishing a revised management agreement with a shared vision and clear objectives, implemented through a structured plan with stakeholder buy-in. All partnerships need to have regular reviews built in to ensure they are continuing to meet changing needs and priorities. The new agreement should address concerns identified in this review, including:</p> <ul style="list-style-type: none"> • How SMBC sets the strategic direction • Services dedicated to responding to members’ enquiries • Removing duplication between strategies and policies • Creating transparency and openness between SHG and SMBC members and officers • Provisions for periodic and urgent reviews <p>This will ensure a more transparent, efficient and mutually beneficial collaboration.</p>	SMBC leadership	<ul style="list-style-type: none"> - Conduct comprehensive review of existing management agreement - Develop new agreement - Formalise new agreement and ensure senior sponsorship in both organisations - Roll this out across SMBC and SHG, underpinned by clear communication to staff -
Recommendation 2: SMBC to work with SHG to enhance existing communication and collaboration mechanisms outside of formal governance mechanisms.			
Outcome: A streamlined, formalised set of communication channels between SMBC and SHG, to tackle key strategic issues, as and when they arise to enable a more agile and collaborative approach.			
Continued practical application	<p>Enhance collaboration and communication between SMBC and SHG by optimising existing channels and forums and ensure members’ expertise is integrated into strategic decision-making processes. This way, both organisations can work in effective partnership to create and implement strategies, and ensure they fully align to borough-wide strategic objectives.</p>	SMBC & SHG leadership	<ul style="list-style-type: none"> - Review existing leadership meetings between SMBC & SHG - Formalise communication channels between teams - Leverage expertise and experience of members

Recommendation 3: SMBC to make sure there is alignment on which priority services it expects SHG to focus its resources on in the interests of tenants.

Outcome: Greater coherence on the activities of wider Stockport partners, and the most efficient use of resources across public and voluntary sectors.

Strategic leadership and continued practical application	Although the wide range of services provided by SHG are of benefit to the people of Stockport, this does not mean that SHG is the best placed organisation through which to deliver non-housing services in the longer term. A review of the services should be undertaken to identify whether there is a more suitable delivery approach; this should be done in the context of the council strategic direction and what would be lost if SHG no longer delivered the services.	SMBC & SHG leadership	<ul style="list-style-type: none"> - Develop assessment approach for testing wider services against strategic aims - Identify and consider positives and drawbacks of alternate delivery options - Carry out assessment
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Recommendation 4: SMBC to work with SHG to strengthen the representation of SMBC members and officers in appropriate forums

Outcome: Agreed processes in place for reporting back to enable closer links between the two organisations and sufficient opportunities for SMBC to set the strategic direction of SHG.

Strategic leadership and continued practical application	<p>Consider the existing representation of council members, council officers and SHG staff at existing forums and determine if any changes are required to improve strategic alignment across both organisations. This should include:</p> <ul style="list-style-type: none"> - Whether there are council forums that would benefit from council member or officer representation where it is currently not in place - Whether there are SHG forums that would benefit from council member or officer representation - Whether there are council forums that would benefit from SHG representation 	SMBC & SHG leadership	<ul style="list-style-type: none"> - Leadership teams to engage to determine if governance forums distribution require changes - If so, begin process for changing distributions - Agree additional reporting mechanisms to ensure members are clear on SHG's strategic direction
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Section 4: Governance and scrutiny

1. Overview and context for governance and scrutiny

Robust governance and scrutiny are crucial for organisations operating in the social housing sector. The right governance and scrutiny framework ensures effective and ethical decision-making, promotes accountability and transparency, ensures values for money, and maintains public trust and confidence. This is of particular importance given the changes made to social housing regulation and the consumer standards / building safety requirements which are in place and directly affect SMBC and SHG.

Whilst formal governance and scrutiny mechanisms are in place, and SHG maintains a proactive compliance culture, elected members need further assurance that SMBC officers and SHG staff alike are preparing for key strategic challenges, and they need to be able to effectively scrutinise the quality of service being delivered. Members also require engagement with SHG to the same extent that they are engaged with other council services; this includes setting the agenda for governance forums, scrutinising performance, and having assurance that their casework is resolved swiftly and that council officers are monitoring performance. Members could be better supported by both SMBC and SHG to be able to undertake these oversight and scrutiny roles within the existing meeting terms of reference which allow for members to set agendas and scrutinise performance.

2. What is currently working well and existing strengths in governance and scrutiny

Formal mechanisms and oversight

- **Management agreement:** SMBC exercises oversight of SHG through a formalised structure. This includes the long-term management agreement, outlining the delivery of services and the collaborative working relationship between the two parties.
- **Members' committee:** there is a cross-party members' committee that convenes three times a year to review SHG's performance, its financial standing and service updates. Reports are publicly available online, and meetings are recorded with minutes taken, demonstrating transparency.

Multi-layered scrutiny and assurance

- **Quarterly assurance meetings:** SMBC conducts quarterly assurance meetings with SHG, involving senior colleagues from both organisations. The purpose of this is to ensure regular and direct dialogue on regulatory compliance and service delivery and to enable SMBC to scrutinise and challenge performance and outcomes for tenants and residents, embedding accountability and responsibility for service delivery through regular engagement.

Proactive compliance culture

- **Regulation project board:** A regulation project board, chaired by SHG's deputy chief executive, exists to oversee a wider range of regulatory matters. These include VfM, data returns and other relevant regulatory issues. The SHG board receives quarterly updates on this regulatory work, keeping them informed on key issues and learning from recent regulatory judgements.
- **Consumer regulation project group:** SHG demonstrates a proactive stance towards compliance through establishing their consumer regulation project group and assigned dedicated leads for each regulatory standard. This structure allows for a thorough assessment against each consumer standard, facilitating the identification and addressing of potential gaps or areas needing development. This indicates a robust internal mechanism to ensure adherence to regulatory expectations.
- **NHF code of governance:** SHG's adoption of the NHF code of governance 2020 is an indicator of its commitment to good-practice governance. An annual self-assessment process ensures compliance with this code and identifies any necessary improvements. This is reported to the SHG board annually.

- **Regulatory standards:** SHG undertakes a full self-assessment against all regulatory standards each year to outline compliance and identify opportunities for improvement. This is reported to SHG board and to the council’s member committee to provide assurance on regulatory compliance.

✓ Internal audit and independent reviews

- **Internal audit:** SHG utilises its internal audit function to provide assurance on its preparedness for consumer regulation.
- **External assurance providers:** SHG works with compliance and H&S specialists to perform a “third line of assurance” over health and safety/compliance functions to ensure there are robust processes in place.
- **Independent governance reviews:** SHG commissions independent governance reviews, such as the one conducted by Altair in 2024. This resulted in a report highlighting key strengths and outlined actions for further enhancement.

3. What isn’t working so well and areas for development in governance and scrutiny

Governance and scrutiny from members, officers and tenant representatives could be strengthened. While there is some good collaboration in place, there is a need for greater collaboration that is led and facilitated by SMBC with SHG, particularly in the context of the big strategic challenges facing housing in Stockport in the future. The governance model has been set up with the intention of providing the right level of scrutiny, however, in practice, forums involving members, officers and tenants are not being used to their full effect.



Forums for members

- **Members’ use of powers:** Members have a number of powers available to them, as set out in specific terms of references, e.g. the members’ committee has the power to dismiss the board if it wishes. Members’ powers in relation to the housing agenda could be made more explicit and transparent.
- **Agenda setting:** there was a lack of clarity from most of the groups as to who sets the agenda for members’ committee and scrutiny committee. Members said that they were often given lots of information in these forums but weren’t always getting the information they wanted. That said, there was acknowledgement that when they asked for specific information it was shared. Members were not always confident that scrutiny committee provided sufficient challenge, and nor were they confident about information sharing outside of those forums. This lack of clarity and scrutiny could limit members’ ability to shape the strategic direction on housing issues, effectively scrutinise SHG’s activities and hold them accountable for delivering their role and aligning with SMBC’s priorities. It could also limit members’ ability to adequately represent the interests of the tenants and residents they represent.
- **Turnover and frequency:** engagement highlighted that the turnover of members on committee and the frequency of members’ committee meetings can make it hard to maintain momentum between the meetings. Group leaders review membership of various committees annually and should consider how they can reduce turnover of membership.
- **Layout of information in reports:** members frequently referenced that data presented in reports can lack sufficient clarity or detail to enable them to provide effective scrutiny. In some cases, it seemed that there was a lack of understanding on what the TSMs / corporate KPIs were referring to, and what they were driving in terms of SHG’s performance. A lack of clarity and accessibility in performance reporting, particularly around key KPIs and TSMs, could make it more difficult to scrutinise SHG’s performance and to identify areas for improvement.



Forums for officers

- **Quarterly assurance meeting:** there are quarterly council assurance meetings that takes place between SHG and SMBC, the purpose of which is to enable assurance over key SHG services. A list of standing and topical

agenda items are discussed at these meetings.

- **Confidence in scrutiny:** a reoccurring theme was that members did not feel that they had the same level of scrutiny over housing services as they do for other council services. This links with the lack of clarity over agenda-setting and understanding of reports and fuels a lack in confidence from members in the quality of the delivery of housing services which may increase requests and queries from members outside of the formal forums.



Forums for tenants

- **Ongoing reporting:** Engagement with tenant representatives highlighted that their meetings were productive, that they were respected and that they shape the agenda, but that they would like to see more ongoing reporting from SHG on progress against actions agreed in previous meetings so that they can keep track of issues. This has already been strengthened by the introduction of a formal action tracking system, which has been in place since the formation of the new ASPIRE panel in summer 2024; and likely addresses this feedback which was provided very shortly after this new system was put in place.

4. Recommendations, outcomes and next steps for governance and scrutiny

Members need to set the agenda for members’ committee and scrutiny committee, and they need to have confidence that officer-level scrutiny is robust and effective. The recommendations below will enhance the governance framework already in place to ensure the right level of scrutiny and transparency to empower members and tenants, strengthen accountability and ensure effective oversight. This will provide confidence to members and tenants in the effectiveness of the scrutiny process and ultimately improve confidence in the effectiveness of SHG’s delivery.

Area aligned to	Description	Owner	Proposed steps
Recommendation 1: SMBC to empower members to drive the agenda of SHG, enabling greater influence of activity and decisions that need to be taken.			
Outcome: Stockport housing decisions will benefit from increased member engagement, more robust scrutiny of decisions and greater transparency in SHG’s operations.			
Forums for members	Empowering SMBC members by reviewing and potentially restructuring existing forums to ensure they provide adequate influence and clearly define interaction with other key groups like the SHG board, will help ensure appropriate decisions are taken without the need for members to possibly become part of the board. This would improve the streamlining of information flows and optimising SHG reporting for greater transparency and member scrutiny.	SMBC governance team	<ul style="list-style-type: none"> - Review (and if needed revise) the terms of reference for member forums - Assign dedicated SMBC officer leads for each forum - Re-design reporting for scrutiny processes and implement required changes following approval
Recommendation 2: SMBC to work with SHG to optimise officer-level governance and scrutiny forums where possible, maximising accountability to colleagues where it makes sense to do so.			
Outcome: This will facilitate more effective decision-making, enhanced risk management and stronger alignment between SMBC & SHG strategic priorities.			
Forums for officers	Optimise the governance and oversight framework of the SMBC and SHG partnership. This involves reviewing and refining terms of reference for existing forums, ensuring appropriate stakeholder representation is present and identifying any governance gaps to enhance strategic decision-making and scrutiny that could be addressed.	SMBC governance team	<ul style="list-style-type: none"> - Review and refine terms of reference for council assurance meetings (CAMs) - Identify and address governance gaps - Establish new terms of reference for CAM as required

Recommendation 3: SHG to strengthen monitoring and accountability of the ASPIRE panel, continuing to develop an agreed action plan to be reported on regularly, and to explore potential options for the ASPIRE panel to be more involved in the collection of tenant satisfaction measures (TSMs) from tenants to further promote accountability and transparency.

Outcome: This should lead to improved delivery of action plans agreed between the ASPIRE panel and SHG, enhanced transparency and greater trust with tenant representatives.

Forums for tenants	Improve the accountability and transparency between SHG and the ASPIRE panel by implementing a formalised action tracker owned by SHG, incorporating it into regular panel meetings, and establishing additional communication channels for progress updates. (Note, a new formal action tracking system is now in place.)	SHG governance team	<ul style="list-style-type: none"> - Test whether the new actional tracking system is meeting the requirements of panel members - Agree any additional communication updates on action plan progress as required
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Recommendation 4: SMBC and SHG to jointly review and redesign reports and data presented by SHG across member, officer and tenant representative forums to ensure they are more accessible to those without housing-specific expertise and avoid technical jargon. Provide clear explanations of TSMs and wider corporate KPIs to audiences and their connection to SHG's and SMBC's strategic objectives, and the data collection methodologies used.

Outcome: This will enable members, officers and tenants alike to better scrutinise SHG's performance and propose impactful next steps.

All	Making sure that SHG's performance data that is presented to members, SMBC officers and tenants is as accessible as possible and easy to understand, addressing repeated concerns raised through focus groups. SHG should provide clear explanations of what each of the TSMs and corporate KPIs are, how data was collected for them, what decisions they drive and how they are connected to achieving the shared strategic objectives of both organisations.	SMBC and SHG governance teams	<ul style="list-style-type: none"> - Conduct discovery on all performance data and reports used across forums - Create explanations for TSMs and corporate KPIs used - Circulate with stakeholders for awareness - Hold focus groups with stakeholders to design new reports
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Section 5: Performance and delivery

1. Overview and context for performance and delivery

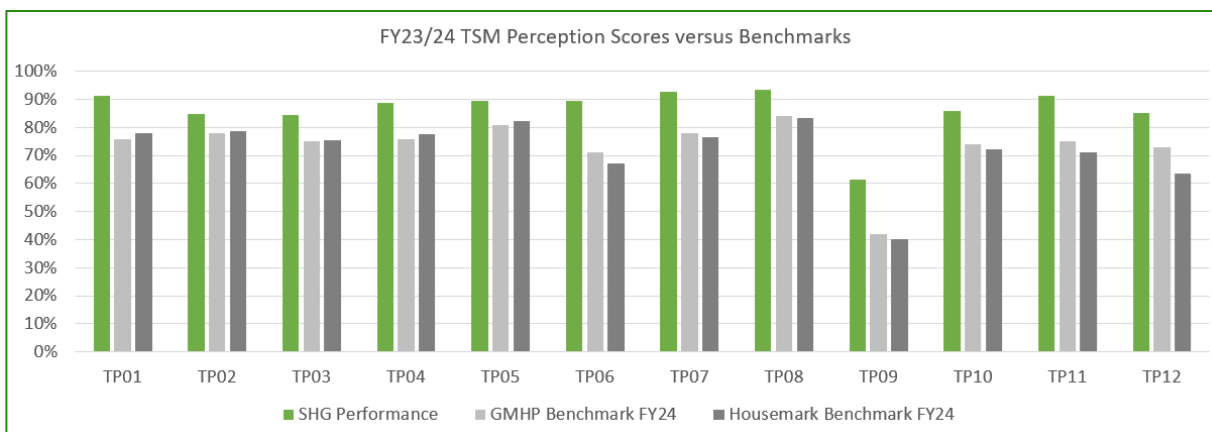
SHG is a strongly performing housing provider. While they are an innovative and creative organisation and excel in many areas, there are opportunities for continued improvement which are described in more detail below.

2. What is currently working well and existing strengths in performance and delivery

Overall, **SHG's performance is strong** compared with providers across the housing sector and it is delivering value for money, evidenced by HouseMark data. Its reputation is well regarded in the social housing sector.

★ Tenant satisfaction measures (TSMs)

Introduced by the Regulator for Social Housing, there are 12 perception-based TSMs and 14 management information TSMs (TSM definitions are shared in Appendix 1). These assess the performance and effectiveness of social housing landlords in providing good quality homes and services to residents. Overall SHG demonstrates performs better across all the TSM compared to the Greater Manchester average and sector-wide HouseMark benchmarks. Overall satisfaction (TP01) and satisfaction with positive contribution to the neighbourhood (TP11) are both areas of strength.



Analysis by HouseMark found online surveys typically score 20% lower on tenant satisfaction scores when compared to face-to-face surveys and SHG relies largely on face to face data collection, so this needs to be taken into account in understanding SHG's performance. SHG's most recent corporate performance report showed the average TSM score for face-to-face surveys was 94%, however online survey average fell significantly to 54%.

★ Corporate performance report

In addition to the perception-based TSM data, SHG has 22 KPIs and management TSMs, as outlined in the corporate performance report, to evaluate their performance, covering areas such as fire safety, anti-social behaviour, complaints and repairs. SHG sets itself stretch targets for its performance, to try and improve, and therefore may miss their targets but still achieve a higher KPI result than other providers who are hitting their targets. SHG met five other KPIs linked to the corporate performance report (with a further one KPI identified as 'amber'; missed but within an agreed tolerance). For KPIs rated as 'red' (missed target), SHG has developed specific actions to address current issues.

🪙 Value for money (VfM)

SHG's VfM strategy references savings, including £126k through successful housing fraud cases and £212k

through restructuring senior management roles, in addition to the 3% efficiencies, often in excess of £800k per year, offered up in the management fee each year. SHG demonstrates strength across all eight VfM metrics based on the data they submit to HouseMark. There is a single outlier on cost for KPI 8 (community / neighbourhood services) which is understood to be due to the range of services that SHG deliver compared

Value for money (VfM) quadrant taken from HouseMark data

- Key**
- 1 = Overheads CPU
 - 2 = Housing Management
 - 3 = Responsive Repairs
 - 4 = Voids and Lettings
 - 5 = Building Safety
 - 6 = Major repairs
 - 7 = Customer Experience
 - 8 = Community / neighbourhood services



★ with other providers, whereby the cost element is not usefully comparable.

Comparison to other ALMOs and other Greater Manchester providers

Despite the number of ALMOs decreasing, ALMOs continue to consistently outperform local authorities in tenant satisfaction. SHG's overall tenant satisfaction rate of 91.32% significantly surpasses both the national ALMO median (73.9%) and the local authority median (64.2%). SHG achieves 100% compliance across all five safety check categories, exceeding national averages. Tenants also reported high scores for feeling safe in their homes, with SHG recording a score of 89.75% compared to the 76.7% average against over ALMOs.

SHG compares favourably to housing providers across the Greater Manchester region across several categories. On rent collection, SHG demonstrates 104.54%, indicating an efficient rent collection process. Other providers, such as ForHousing and Salix demonstrate 91.25% and 95.49% respectively. SHG's has a low arrears rate of 2.13%, significantly outperforming the average across Greater Manchester (4.76%) and surpassing well-regarded providers such as Regenda (2.5%). Strong arrears management demonstrates effective credit control measures and support mechanisms in place for tenants such as money advice services. The number of Housing Ombudsman determinations made to SHG is comparable to peers across GMHP. SHG received two determinations, significantly lower than Bury (6) and ForHousing (21). SHG's performance regarding determination was slightly higher than Jigsaw (1) and One Manchester (1).

3. What isn't working so well and areas for development in performance and delivery

Overall SHG's performance is strong comparing favourably in all TSMs to comparators across Greater Manchester and HouseMark, but, as with all organisations, there are improvement areas to focus on.

Tenant Satisfaction Measures (TSMs)

In 2023/24, complaint handling and time to repair were identified as the two TSMs with some levels of dissatisfaction among tenants. 20% of tenants reported dissatisfaction with complaint handling time (TP09) and 11% reported dissatisfaction regarding time to repair (TP03). Satisfaction scores vary in different localities with tenants in Reddish South (50%), Heaton Norris (69%) and Churchgate (72%) less satisfied than in other areas, with an overall average in Stockport of 91%, and also falling short of the Greater Manchester and HouseMark averages. Engagement with SMBC members also indicated that some wards had more challenges

than others, in part reflecting the volume and type of council housing in those wards e.g. wards with tower blocks and bigger estates had higher levels of member casework on housing reported anecdotally.

Different data collection methods, as mentioned earlier, also impact TSM results with online surveys typically score 20% lower on tenant satisfaction scores than face-to-face surveys. The table below outlines the proportion of different data collection methods used by SHG compared across Greater Manchester. SHG has already started broadening its TSM data collection methods, utilising more online surveys.

Provider	Total surveys Completed (Q1 24/25)	% Telephone	% Face to face	% Online via email	% Online via text	% SMS surveys
GMHP total (excluding Stockport)	8139	74	1	9	11	5
Stockport	234	6	94	0	0	0

Breakdown of TSM surveys completed for Q1 2024/25 (Stockport vs rest of GMHP)

Corporate performance report

In total SHG achieved its stretch targets in 12 out of 22 KPIs included in the 2024 corporate performance report. There were nine KPIs identified as 'red' (target and tolerance missed). As noted earlier in this section, the review recognises that these are stretch targets and SHG is still performing above most other providers on these KPIs. The table below summarises the actions being taken for each of the missed KPIs.

Key performance indicators	Results (target)	Action summary
Average time taken to re-let empty dwellings (all re-lets)	13.8 days (13 days)	SHG is mitigating delays in re-let times by implementing proactive property inspections during void periods to plan necessary works in advance.
% of properties and communal areas with a satisfactory electrical installation certificate	99.88% (100%)	SHG is addressing this by working with external agencies and neighbourhood teams to overcome access challenges with tenants with complex needs.
% of homes with all required fire risk assessments carried out	99.82% (100%)	Outstanding fire risk assessments due to access issues have been resolved and completed.
% of homes for which all required asbestos management surveys or re-inspections have been carried out	99.79% (100%)	Access issues hindering asbestos re-inspections have been addressed through collaboration with the neighbourhood team, leading to completion.
% of fire safety follow on actions completed within timescale per fire risk assessment	94.49% (100%)	SHG is tackling the increased volume of fire risk actions by batching procurement, adding staff resources, and implementing a new procurement framework.
% of homes compliant with smoke and carbon	97.63% (100%)	SHG will address the remaining 3% of non-compliant properties during annual gas safety checks, with a positive trend in installations observed.
% of ASB complainants satisfied with the outcome of their case (transactional)	86.70% (90%)	SHG is actively addressing ASB dissatisfaction by reviewing cases, implementing agreed actions, and demonstrating a positive performance trend.
% satisfaction with repair (transactional)	81.13% (90%)	A targeted plan with improved reporting and monitoring is being implemented to reduce overdue non-emergency repairs.

Proportion of non-emergency responsive repairs completed within the landlord's target timescale	74.59% (88%)	Multi-skilled resource levels are being reviewed to increase completion at first visit and the re-introduction of SOR codes to improve types and levels of van stock and job information for operatives is ongoing
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Comparison to other ALMOs and other Greater Manchester providers

In line with national averages published by HouseMark, there is currently a sector-wide decline in tenant satisfaction, with particular dissatisfaction on increasing repair times. The increasing backlog of repairs is a direct factor in this. Satisfaction with repairs is a key opportunity for improvement for SHG; existing customer satisfaction of 81.31% is below other comparators across GMHP, with providers such as Jigsaw (89.40%), Salix (90%) and Southway (90%) all reporting higher first-time fix rates and customer satisfaction. Greater focus should be placed on longer term satisfaction rather than just first-time fix rates to help improve overall customer satisfaction – this was reflected in anecdotal tenant feedback conducted as part of this review. Although comparison to peers across Housing Ombudsman determinations is positive overall, there is opportunity to refine the existing complaint handling process to reduce escalations, with greater focus on the overall customer journey, rather than just the first time fix rate.

There is an average 27-day turnaround from report to inspection for damp and mould, significantly higher than ForHousing (8 days) and Jigsaw (16 days) whilst also being longer than the average across GMHP. Addressing this should be a priority and it is recommended that the existing process is mapped to identify how to improve the speed and efficiency of this process.

Development of new homes

SHG was the first ALMO to undertake new build housing development and demonstrates a positive track record in housing development, with ~1,000 new homes built in the past decade. Ambitious targets have been set by government, with 1.5 million new homes targeted over the next five years. Partially due to financial constraints, the target of 200 new homes a year across the borough seems a major challenge.

The adjacent table shows the pipeline development programme for the borough, with only two of the six schemes expected to return a positive net present value (NPV); based on a current SMBC agreed parameter of 40-year payback. This means that some of these schemes will require additional funding on top of the Homes England and Brownfield grants. SHG has demonstrated a proactive approach to developing funding sources, with income generation, retained 1-4-1 receipts, commuted sums and recycling capital grant funds allocated to schemes in London Road, St. Thomas and Higher Hillgate. Nevertheless, it is noted that the pace of development of new homes needs to increase, given homelessness and affordable housing challenges, and it is recommended that SMBC work more closely with GMCA and Homes England regarding the funding required for new housing across the borough, considering different types of activity and funding that can be provided (e.g. grants, loans, joint ventures, development services). SMBC also needs to identify the optimum arrangements for housing development in the borough to

Scheme name	KPI results based on revised parameters
London Road 32 units social rent (SR)	NPV- £2,202,567 Profit- 38.63%
Higher Hillgate 24 units affordable rent (AR)	NPV- £36,324 Profit- 1.0%
St. Thomas' Gardens 70 units (37 SR & 33 AR)	NPV- £671,214 Profit 5.14%
Alpine Road 4 units social rent	NPV- £91,203 Profit- 14.59%
Truro Avenue 6 units social rent	NPV- £8,133 Profit- 1.09%
Grafton Street phase 2 2 social rent	NPV- £277,210 Profit - 33.15%

Pipeline development programme

meet housing needs and provide the best public value, and as part of that, to clarify its approach to having in-house development within the HRA.

4. Recommendations, outcomes and next steps for performance and delivery

Overall SHG is a strongly performing organisation. There are opportunities for improvement with recommendations and associated next steps also considered.

Area aligned to	Description	Owner	Proposed steps
Recommendation 1: SMBC and SHG to jointly develop targeted locality plans that focus on the top five areas where satisfaction is lower, tailoring to the specific challenges and issues experienced by each locality.			
Outcome: Improved satisfaction across existing localities that report low satisfaction, delivering better services to tenants and improving SHG metrics, as well as creating opportunities to bring members closer to SHG delivery.			
Overall performance and TSMs	The development of specific plans that are tailored to individual localities will make sure individual concerns and challenges are addressed.	SMBC & SHG operations teams	<ul style="list-style-type: none"> - Confirm localities that require specific focus / plans - Identify tenants to engage with from localities to understand specific challenges - Review locality specific data to support engagement - Develop specific action plans that set out targeted actions and method for monitoring performance
Recommendation 2: SHG to continue current work to develop approach to obtaining TSM data from tenants through a wider variety of collection mechanisms			
Outcome: Embedding e.g. digital collection mechanisms, in line with other housing providers, should ensure a greater spread of views are collected and create greater confidence that the TSMs provide the most accurate and representative view on SHG performance. SHG will need to be mindful of accessibility in doing this. SHG should also provide clarity to tenants on what specific interaction they are being asked for feedback on when they request feedback.			
TSMs	To make sure findings and scoring is accurate for SHG, a more balanced approach that relies less on face-to-face surveying is required.	SMBC & SHG operations teams	<ul style="list-style-type: none"> - Develop and agree targeted split of different methods as part of new approach - Begin to develop targeted feedback forms for specific services where possible - Embed revised approach, including frequency of engagement for different means of feedback
Recommendation 3: SMBC to conduct a review of development capacity across SMBC and SHG.			
Outcome: An optimum model implemented to meet SMBC regeneration ambitions and affordable housing challenges, making the best use of skills, capacity and resources across the two organisations and maximising potential for external investment.			
Development of new homes	SMBC needs to consider the role Stockport must play in the delivery of housing targets across GMCA and the wider country. There is opportunity to take advantage of changes	SMBC strategic housing team	<ul style="list-style-type: none"> - Refine and confirm new homes targets for Stockport - Engage with GMCA to align on targets and priorities, including the role Stockport can undertake in contributing to the wider targets of the Greater

	<p>across the sector (e.g. new mechanism for funding and increased collaboration between local authorities and Homes England) to deliver requirements of Stockport. SMBC needs to clarify its approach to having in-house development within the HRA</p>		<p>Manchester region</p> <ul style="list-style-type: none"> - Develop engagement plan with the relevant leads within Homes England (market, partners and places directorate, north section) - Engage with Homes England on different opportunities for support - Clarify approach to having in-house development within the HRA
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Recommendation 4: SHG to continue and further develop its practice of carrying out in-depth service reviews, reviewing existing processes for specific areas where opportunity has been identified, including responsive repairs and complaints handling

Outcome: Identification of process specific areas of inefficiency that can be removed or refined to deliver a better outcome for tenants and improve satisfaction scores for SHG.

<p>Process improvements linked to comparison across GMHP and HouseMark</p>	<p>Analysis has identified specific process areas where SHG has opportunity to improve, compared to others across Greater Manchester and other ALMOs. Maximising efficiency of existing processes for certain services will deliver benefits for both SHG and tenants.</p>	<p>SHG customer experience team</p>	<ul style="list-style-type: none"> - Confirm priority list of services for process improvement activity - Identify operational stakeholders to support process improvement - Map the existing ‘as-is’ process, including handoffs and underpinning technology that is used - Review existing ‘as-is’ process and identify steps that could be improved upon or removed - Consider technology to possibly automate existing manual steps - Develop future ‘to-be’ process that aims to eliminate inefficiency - Roll out future ‘to-be’ process across wider teams once confirmed
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Section 6: Ways of working

1. Overview and context for ways of working

To prepare for the strategic challenges and to maintain current high-performance levels, SMBC and SHG will need to work in close partnership and collaborate together. The review found that although there are several mechanisms in place to enable effective ways of working, both organisations have understandably different cultures and work in a distant and sometimes conflicting way. Housing is part of the solution to many of Stockport's challenges and both organisations need to work closer together, with a single strategic direction, for the benefit of the borough.

2. What is currently working well and existing strengths in ways of working

There are examples of strong collaboration across SMBC and SHG and a willingness and commitment on both sides to foster a positive working relationship for the benefit of the people of Stockport.



Commitment and passion of staff

- **Feedback from officers, members and tenants:** Across all stakeholders engaged with as part of this review, there was unanimous agreement that SHG has committed and dedicated staff who are working hard to deliver for tenants and residents. SHG's board membership brings talent, expertise and commitment to their roles and all the executive team demonstrated a passion for what they do.
- **Patch-based teams:** Many of SHG's frontline staff work in patch-based teams which allows frontline staff to be well-known by tenants and ward councillors, helping issues to be addressed and resolved. The expertise, skills and experience of staff are recognised and valued by tenants, members and partner agencies.
- **Role in wider Stockport society:** SHG and its people are committed to the communities they serve and see their role as being about the neighbourhood, not just the property. This was evident with everyone that was engaged with at SHG as part of this review. This value motivates staff to deliver beyond just a housing-specific scope and deliver things like the pantries and advice services.
- **Relationships between SMBC & SHG:** Staff across both organisations have worked hard develop positive relationships over the years to overcome common challenges and show commitment to do this whenever needed for the benefit of Stockport and specific case work.



Collaboration across both organisations

- **Strong collaboration with counterparts:** There are lots of examples of collaboration across teams at SMBC and SHG with their counterparts, as well as with external partners, to share information and tackle problems in a user-centric way e.g., SHG work with SMBC's youth offending services and the police where there are tenants at risk of criminal proceedings.
- **Strong collaboration within SHG:** As well as working with SMBC and external partners, SHG managers gave examples of positive collaboration across their different teams, sharing information with each other and providing supportive feedback, to deliver outcomes for tenants and residents of Stockport.
- **Willingness to collaborate:** There is a willingness and commitment from both SMBC and SHG to foster a positive working relationship.



Strength of culture across SHG

- **Continuous learning and improvement:** This is a big part of SHG's culture. From staff at all levels, the contribution of tenant representatives through the appropriate boards (e.g., the ASPIRE panel) was widely respected and the organisation values the scrutiny and feedback they provide to allow SHG to continuously learn and improve.

- **Talent attraction and retention:** SHG has a positive brand that helps them attract talent in a competitive market. There is a strong emphasis from leaders on the positive impact of accreditations in talent attraction and retention (e.g., SHG’s retention of the Best Companies 3-star accreditation, illustrating ‘world-class’ levels of engagement). Engagement with staff highlighted that their management teams support them and provide development opportunities for them in their roles and across the group.
- **Supportive culture and resilience:** Engagement with staff highlighted that diversity and inclusion is actively embraced throughout the organisation, flexible working was embraced and there are multiple staff networks to actively support people including LGBTQ+, menopause, carers support group. SHG recognises that resilience is critically important for their frontline staff and staff in focus groups highlighted that SHG’s resilience training and support was very strong.

3. What isn’t working so well and areas for development in ways of working

There are several collaboration and communication challenges, many of which relate to perceptions which may not be founded but nonetheless need to be addressed.



Collaboration with different groups

Collaboration with members

- **Resolving casework:** Not all members are assured that when they contact SHG about tenant housing issues that they are prioritised in the way in which they would be with other council departments, although they did recognise that their queries are usually responded to quicker than the agreed SLA of 10 working days. There is a perception among some members and tenants that when things go wrong, member involvement is necessary to unblock and resolve issues. Frontline services can feel disconnected from democratic processes, and elected members would benefit from an approach that elevates their casework from tenants and provides additional, exception response times and support from SHG staff to resolve. This perceived lack of prioritisation for member-raised casework, even if responses are timely, can erode trust and create an impression that SHG is less responsive than other council departments.

Collaboration between SMBC & SHG

- **Involvement of the right people:** In both SMBC officer and SHG staff focus groups, it was apparent that officers and staff are often uncertain on when to involve their counterparts in non-explicit housing-related forums or decisions where housing could be a wider part of the solution. This means the council is missing opportunities to make greater progress on some of the challenges it faces. Although there is a strategic housing team, a core strategic housing knowledge is required across all senior leaders in the organisation. This lack of clarity surrounding roles and responsibilities, coupled with a broader understanding of what strategic housing enables, can lead to missed opportunities for incorporating housing solutions into wider council initiatives.
- **Duplication and overlap:** SMBC officers raised the duplication and overlapping of strategies between SMBC and SHG, which can appear confusing and potentially competing and may lead to a perception that there isn’t a single common goal across both organisations. For example, SMBC and SHG have separate communications strategies and approaches despite serving some of the same service users and residents. Duplication and overlap can create confusion, is inefficient and potentially hinders a coherent approach to serving residents.
- **End-to-end processes:** It is unclear whether there is a suite of end-to-end processes that SHG use for priority activities setting out every step, all the hand-offs and ownership of each step, e.g., for common repairs or complaints handling. SHG works with sub-contractors and there was a perception with some

SMBC members and officers that there aren't clear processes which means things fall through the cracks, mistakes occur and it is harder for SMBC to easily hold SHG to account. The lack of clarity regarding end-to-end processes, especially when subcontractors are involved, can create accountability gaps and increase the risk of errors, delays, and inconsistent service delivery.



Communication across different groups

Member perceptions

- Openness to challenge: There is a disconnect between the SHG performance data and the anecdotal evidence of performance that members have from their caseloads. Because of this, members want to test and challenge the information they are being given at member's forum or scrutiny committee. Multiple groups said that they found SHG to be defensive when raising challenges, particularly around specific case work or scrutinising organisation performance. Some members do not think that SHG staff are held to the same standard as SMBC officers, in that they cannot be summoned and are not answerable to members on particular issues. In practice, members do have these powers but because SHG is answerable to its own board there is some ambiguity. This perceived defensiveness and lack of accountability, even if rooted in structural ambiguity, can damage trust and create an adversarial relationship between members and SHG. It is acknowledged that members casework will generally be the more complex cases where tenants and residents are escalating their concerns and that casework, by its nature, will not include success stories.
- Member involvement: Members perceive that their involvement in cases is necessary to unblock things, and that their input is not welcomed by SHG. Sometimes this is a misperception caused by poor communication, for example a delay in getting a part meant that something was not fixed quickly, and the part arrived shortly after the member raised the case, but it would have been resolved without their input. Sometimes, however, when something does go wrong, tenants reported that they needed their ward councillor to advocate for them and without the input of their councillor their issue would not have been resolved. Whilst members may perceive that their input in cases is not welcomed, evidence of this sentiment in SHG was not visible. During this review, SHG staff who deal with member queries demonstrated respect for the role that members play as part of the democratic process and prioritise their enquiries. This disconnect between members' perceptions of how they are treated by SHG and SHG's perceptions of how they treat members is causing some degree of tension and highlights the need for improved communication and transparency around processes to ensure members feel heard and valued, while also managing expectations about resolving individual tenant issues.
- Scope of issues: There is a perception from some members that SHG is failing to deliver on key issues that they see in their case work, e.g., homelessness or housing allocation processes; often these are wider-societal problems that are affecting the housing sector as a whole and are not within the control of SHG who are often following national policy e.g. on housing allocations.

Tenant perceptions

- Repairs and complaints processes: Of the tenants engaged with, they unanimously said there was not enough timely information shared by SHG during repairs or during the complaints processes, leaving them in limbo. Depending on the nature of the issue, this has concerning implications for their health and wellbeing. This lack of timely communication during repairs and complaints processes can create significant anxiety and uncertainty for tenants, eroding trust in SHG's ability to address their concerns effectively. Based on customer feedback, SHG are implementing changes to the repairs communication and messaging processes to provide more timely updates to customers who have raised repairs.

- Clarity on services: It is not clear to tenants or leaseholders what SHG is responsible for and what they are responsible for; it is particularly unclear in cases where some tenants are eligible for a service and others are not, e.g. due to a disability; this can lead to a perception of inconsistency or unfairness from SHG. For example, a tenant may be aware that their neighbour had their wall painted after it was plastered but they aren't aware that their neighbour was eligible for this because of a disability. This lack of clarity regarding service responsibilities and eligibility criteria can lead to confusion, frustration, and a perception of unfair or inconsistent treatment by SHG. Clearly communicating service offerings, eligibility requirements, and the rationale behind any variations in service provision is crucial to managing tenant expectations and ensuring fair treatment. It is noted that SHG must address this in a way which maintains confidentiality.
- Customer service: Of the tenants engaged with, most of them had experiences of operatives who spoke to them respectfully and delivered a good service and of operatives where the opposite was true. The process for performance management of SHG staff is clear and robust and staff are monitored and performance managed, for example, a sample of their calls are listened to regularly. This is, of course, much harder with contractors and it isn't clear whether the cases tenants highlighted involved staff or contractors. Of the three tenants engaged with as part of this review via their ward councillors, the overriding theme in their cases is that to get their issues resolved they had to self-advocate, be tenacious and involve their ward councillor for support. Although a small sample size, the percentage of cases that go wrong is small compared to the tens of thousands of cases that are delivered well, but the real-life implications to these people are significant. Whilst SHG has systems in place for managing staff performance, the inconsistent experiences with customer service, particularly the challenges faced by some tenants in resolving issues, highlights potential gaps in quality control, especially with contracted services.

SMBC officers and SHG staff perceptions

- Partnership behaviours: Although there are many examples of SMBC and SHG working collaboratively as partners, collaboration between SMBC and SHG staff was not always as effective as it could be leaving scope for improvement on strategic alignment and for potential efficiencies and increased effectiveness in SMBC's and SHG's joint efforts to address housing challenges in the Borough.
- Sharing success: There is a widespread perception across SMBC that SHG's successes are wholly their own and not a shared success of the borough, achieved through working in partnership. SHG is seen to prioritise awards and accolades and none of these are joint with SMBC, which is a missed opportunity. SHG sees the awards as being key to staff morale and talent attraction and want SMBC to see it as their own success too, but it leaves a perception in SMBC that SHG sees themselves as independent of the council. This perception of separate successes and independent operations, fuelled by a lack of joint recognition and celebration, can undermine the spirit of partnership between SMBC and SHG.

4. Recommendations, outcomes and next steps for ways of working

There is duplication of work between SMBC and SHG which can lead to incoherence for tenants and residents who often don't see SMBC and SHG as separate organisations. There are challenging perceptions from members, tenants, SMBC officers and SHG staff, some of which may not be founded, but that need to be addressed nonetheless. Considering options for implementing shared services of back-office functions is recommended where this may provide possible cost efficiency and greater user-centricity e.g. data and communications. SMBC and SHG should consider a single, joint campus to further enhance collaboration. The clear documentation of service offers for tenants and leaseholders to address mismanaged expectations is also recommended. Doing these things will create efficiencies, improvements and greater coherence in the delivery of both organisations and address some of the communication and perception challenges from members and tenants.

Area aligned to	Description	Owner	Proposed steps
Recommendation 1: SMBC to work with SHG to explore options for shared services of back-office functions, joint procurement areas and other key functions that may enhance tenant experience.			
Outcome: There may be efficiencies to be gained through streamlining operations across SMBC and SHG (although these are unlikely to be very material) to reduce overall costs and improve service delivery for Stockport's residents and tenants.			
Duplication and overlap	This recommendation explores the potential of shared services between the two organisations to enhance efficiency and service delivery for Stockport residents. It involves identifying suitable functions, carefully considering organisational strengths and potential risks and establishing clear roles and responsibilities for seamless integration where this is the right thing to do for Stockport. This review encourages thinking about shared services in its broadest sense and not limiting to just back-office functions, but to consider it for any function that could enhance user-centricity. It is important to mitigate any unintended consequences from implementing shared services.	SMBC & SHG operations teams	<ol style="list-style-type: none"> 1) Conduct comprehensive review of back-office functions across SMBC & SHG 2) Review other key areas for shared service potential 3) Develop and implement a shared service model
Recommendation 2: SMBC to drive options and opportunities for face-to-face collaboration on regular occasions or for certain meetings / forums.			
Outcome: Closer collaboration, improved communication and a stronger sense of partnership that is led by SMBC could be addressed through an increase in face-to-face contact time (across all grades).			
Involvement of the right people	Organise joint workshops and networking events to foster trust and open communication between the two organisations. Improve understanding across SMBC so that officers know when to involve SHG colleagues in relevant discussions. This	SMBC & SHG leadership	<ol style="list-style-type: none"> 1) Facilitate relationship-building opportunities for leaders

	<p>could include providing training to officers on SHG roles, services and the value of housing as a strategic asset in delivering wider outcomes to tenants. Exploring the potential for a single joint campus could further enhance collaboration, particularly if careful decisions are made about co-locating specific teams that could be more productive if they worked closer together.</p>		<p>2) Enhance understanding of housing's contribution to SMBC's priorities</p>
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Recommendation 3: SMBC and SHG to work together to address member perceptions and maximise transparency across ways of working and between teams at all grades.

Outcome: This should build trust and confidence in the partnership between SMBC and SHG, leading to greater support for the proposed agreement. Closer working is likely to have indirect benefits across the other themes.

<p>Member perceptions</p>	<p>This recommendation focuses on strengthening the relationship and collaboration between SMBC and SHG through joint initiatives and knowledge sharing. This includes fostering trust and open communication through workshops and networking events, as well as educating SMBC officers on SHG's roles and services to leverage housing expertise for broader positive outcomes. SMBC and SHG should agree how to strengthen the links between members and SHG so that members feel they are getting the same response from SHG as they do from any other council department.</p>	<p>SMBC & SHG finance / real estate teams</p>	<ol style="list-style-type: none"> 1) Explore feasibility of a shared campus 2) Prioritise co-location of key teams 3) Identify practical ways to strengthen the links between members and SHG (linked to governance and scrutiny recommendations)
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Recommendation 4: SHG to document service offerings for residents and tenants comprehensively to avoid confusion or ambiguity (e.g. option to provide an updated view of all services via digital forums, such as the SHG website).

Outcome: This will enable tenants and residents to be more informed on housing services provided, with enhanced accountability and improved continuous improvement in service delivery. It will create improved clarity of services, clearer expectations for tenants and improved customer satisfaction.

<p>Tenant perceptions</p>	<p>This recommendation centres on clearly communicating what SHG's responsibilities are and what are the responsibilities of tenants and leaseholders, and where there are eligibility criteria where some tenants are eligible for a service that others aren't. This will address confusion and perceptions of unfairness. SHG can improve service transparency and user experience for residents through creating clear process maps, defining service level agreements and actively seeking feedback from residents, officers, members, and tenant representatives.</p>	<p>SHG operational teams with input from SMBC and members</p>	<ol style="list-style-type: none"> 1) Develop clear and simple comms on services and eligibility 2) Proactively engage with members on this 3) Document end-to-end processes for key services
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Section 7: Data and insights

1. Overview and context for data and insights

Data is increasingly seen as a strategic asset that can be used to inform decision making across organisations and enable effective ways of working throughout key processes. Closely linked to technology, challenges across the wider public sector associated with effective use of data includes a lack of a ‘single source of the truth’ and poor data quality to support delivery. This review has highlighted several areas of existing strengths and opportunities for further development to maximise the use of data and insight in the future.

2. What is currently working well and existing strengths in data and insights



Data strategy

SHG has developed a data strategy that guides the use of its data across day-to-day working. The development of a data strategy highlights forward thinking on what SHG want to use data for in the medium to long term. The strategy sets out several priorities and commitments, including:

- **A focus on customer experience.** Utilising data to help inform service delivery with the aim of creating personalised and tailored housing services.
- **Becoming a data-driven organisation.** Adopting the approach that data is a critical asset; utilising data to becoming data-driven.
- **Data governance principles.** This includes the creation of a data governance function, which can be a common pitfall when looking to embed data and insight.
- **Improve data architecture.** Maximising data integration through the development of a clear data architecture will help to enable SHG to become a data-driven organisation. The strategy is seeking to implement a data warehouse and Power BI programme, developing data and insight capability.
- **Aligned to wider transformation.** This includes alignment to SHG’s wider transformation agenda, vision, digital and business transformation strategies.

The inclusion of a data strategy is a positive first step towards best practice for data, analytics and insight. Data sharing is taking place between SMBC and SHG appropriately and in a user-centric way. This demonstrates practical application of using data to support delivery across both SMBC and SHG.



Data application

Building on the development of a data strategy, SHG has access to a significant level of insight across Stockport and demonstrates a desire to maximise the use of data and insight for the benefit of the borough. SHG seeks to use data to enhance tenant experience, identify and proactively address common issues and complaints, and to identify relationships between demographics and satisfaction levels.

3. What isn’t working so well and areas for development in data and insights

Although SHG demonstrates a commitment to developing the use of data, there are opportunities to further maximise the use of data across key areas. Where applicable, areas of development also apply to SMBC.



Strategic alignment on data

The inclusion of a data strategy highlights SHG’s commitment to data and insight and beginning to become a more data-led organisation; there are several areas for development to better embed this into both operational and strategic activity:

- There is inconsistency in data being seen as a strategic asset across both organisations and a need for a greater appetite to seek insights from the data the other organisation has about residents, tenants and

service users. Engagement should take place between the data teams at SHG and SMBC to develop and agree commonality around data that links to strategic aims (e.g. understanding where and how SMBC can appropriately support the different elements of the SHG strategy and how SMBC can benefit from the insights garnered from SHG's data).

- Although SHG's vision for data is backed by SMBC, there are constraints as a result of SMBC owning the licencing of the technology needed to achieve their vision. SMBC are responsible for a much wider remit of data across their other departments which means they cannot progress at the same pace as SHG.



Data application

Engagement with tenants raised concerns with the following areas, listed in order of how high the concern is:

1. Getting repairs right first time (dealing with the root problem and not applying a sticking plaster)
2. Dealing with complaints
3. Effective communications during the repairs process
4. Customer service, particularly the way some operatives have spoken to tenants
5. Concerns about antisocial behaviour in their neighbourhood
6. Dealing with concerns about mould

The performance and delivery section of this review noted that SHG has action plans for many of these concerns; the clear application of data to inform these action plans will help successful implementation. As noted earlier, SHG is reviewing its data collection methodology. Satisfaction surveys were highlighted by tenants as being generic. More specific feedback / complaint forms would enable more information to be provided and would improve insight and in turn, the ability for SHG to target improvements in the services they provide.



Reporting and benchmarking

Data is critical for providing accurate and up to date summaries of performance; reports from SHG are not always made easy for members to effectively scrutinise and understand where changes, interventions or improvements need to take place. In addition, reports do not always focus on the key strategic issues facing housing within Stockport, and without more detailed data analysis, both organisations cannot effectively tackle these challenges. This development area doesn't just sit with SHG; the flow and sharing of data for effective reporting is a responsibility of both SHG and SMBC.

The connection and alignment of datasets across organisations is a critical enabler of this. Whilst it is recognised that SMBC and SHG will capture and store different data in line with their aims, objectives and technology systems, areas of commonality should be explored by the data teams, subject to data protection principles and legislation.

It is recommended that a consistent approach to sampling and reporting is set and established in line with comparators such as HouseMark. Although it is recognised that sample size will be significantly higher for HouseMark as they consider multiple different ALMOs (and subsequently cover a much broader tenant group), consistent factors such as duration of a period to cover can be aligned to good practice. This will enable better comparisons to data and in turn, a more accurate understanding of performance.

4. Recommendations, outcomes and next steps for data and insights

Overall SHG demonstrates a proactive approach to the use of data to develop insight, understand performance and guide medium to long term activity through the data strategy, however there is opportunity to develop advance progress further. The recommendations will also require a joint commitment from SMBC in both becoming data-driven organisations.

Area	Description	Owner	Proposed steps
Recommendation 1: Supported by SMBC, SHG to consider the implementation of a data literacy programme / training material across both organisations that enables data to be used as a strategic asset.			
Outcome: Data should be consistently leveraged effectively across both organisations, leading to better-informed decision-making, improved performance monitoring and enhanced service delivery.			
Data strategy, data application and data reporting	Whilst there is a strategy, there also needs to be the capability across the organisation to successfully deliver that strategy and that requires good data skills beyond just the data team. SHG and SMBC need to understand what key data skills are needed across both organisations to deliver for tenants and provide appropriate training and upskilling for key roles across SHG and SMBC.	SMBC & SHG data teams	<ul style="list-style-type: none"> - Identify and confirm key data related topics that align to SHG’s data strategy - Consider the required training facilitation materials, including who can facilitate and the appropriate audiences - Roll out training to identified colleagues, applying practice applications that they can take forwards as part of their roles - Continuous review of training opportunities on an on-going basis
Recommendation 2: SMBC and SHG to collaborate around updating data sharing agreements and data governance guidelines to allow for more meaningful data sharing to take place.			
Outcome: These will support more effective data-driven decision-making, leading to better-targeted interventions, improved service outcomes and enhanced accountability that will ultimately have a significant impact on tenant satisfaction.			
Data strategy and data application	A consistent understanding of the data datasets, owners and data sharing practices across both SMBC and SHG will enable better use of the data, ultimately for the benefits of tenants. Opportunities for collaboration and additional data sharing agreements should also be explored between the data teams.	SMBC & SHG data teams	<ul style="list-style-type: none"> - Identify from the outset the data guidelines and restrictions that need to be adhered to (e.g. GDPR considerations) - Conduct a data inventory assessment to clearly identify the data present across both organisations - Identify commonalities and opportunities for alignment - Reflect proposed and agree changes in guidance documentation across both SHG and SMBC
Recommendation 3: SMBC to work with SHG to review and embed a consistent data quality standard across both organisations, from data collection and capture through to data reporting.			
Outcome: This will create increased trust and confidence in data, leading to more reliable insights, better-informed decision-making and improved accountability. Improvements in data standards and quality will require the underpinning technology to effectively store data that can be easily accessed.			

Data application and data reporting	<p>For data to be used appropriately in a reliable manner, consistency in the quality of data needs to be in place. Effective decision making and confidence in performance reporting will require assurance that the data underpinning activity is up to date and accurate.</p>	SMBC & SHG data teams	<ul style="list-style-type: none"> - Develop an overarching data quality framework, outlining the minimum standards expected for different parts of an end-to-end process (e.g. minimum standard expected when logging data) - Develop appropriate guidance and communications to all staff, highlighting the importance of data quality that applies real scenarios to help applicability and understanding - Agree responsibilities for managing and maintaining the quality of data across SHG and SMBC
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Recommendation 4: SHG to review data capture / collection methods from tenants regarding service performance (e.g. feedback / complaint capture forms) to enable greater specificity

Outcome: This should facilitate a greater level of insight and understanding for SHG to make better informed decisions, including more detailed and accurate reporting for performance.

Data application and data reporting	<p>The opportunity for tenants to provide as specific feedback as possible will benefit SHG through a greater understanding of the areas that need to be improved upon. The opportunity to revise existing documentation and forms provided to tenants would enable greater insight to be derived from tenant submissions.</p>	SMBC & SHG data teams	<ul style="list-style-type: none"> - Develop long list of all data capture methods / forms etc that are sent to tenants for different services - Review forms and identify opportunities for greater specificity - Identify areas for alignment to key performance metrics (e.g. TSMs) - Agree revisions and implement changes across documents
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Recommendation 5: SHG to revise data reporting methods / documentation to suit different audiences (e.g. members) and implement changes align to audience requirements.

Outcome: A review of how SHG presents key data and information that matches the needs of different audiences will make sure a more accurate understanding of performance is gained by all.

Data reporting	<p>For reporting to be meaningful and useful for different stakeholder groups, this has to be understood and valid. This includes members, who require specific information that applies to their areas as well as the borough overall. In comparison, comparing performance data with HouseMark needs to be consistent where possible to make sure valid comparisons can be made.</p>	SMBC & SHG data teams	<ul style="list-style-type: none"> - Engage with members to understand their needs and requirements for data / performance reports - Review and agree requirements and determine feasibility of changes - Ensure that agreed reporting requirements align with data collection methodologies laid out by the regulator - Consider application to existing reporting approaches across SHG and SMBC - Agree areas of change and implement as required
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Appendix 1 – Additional background, context and comparator insights

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Appendix 1 shares further background, context and comparator insights which may be helpful to understand when considering the findings and recommendations of the review.

SHG's remit

Established in 2005, SHG currently maintains responsibility for the management of Stockport's housing stock (c.11,500 homes) across the borough. Originally established for a period of 10 years, the existing approach was reconfirmed with a 27 year agreement in 2014 following an options appraisal and tenant consultation. SHG provides services across the borough, which fall within its remit and direction given to it by its approved articles. This is outlined in Appendix 1:

- **Council and private sector housing.** SHG is responsible for developing an asset management plan (AMP) and capital programmes to create an effective stock investment programme that responds to customer needs. The AMP feeds into the maintenance and repairs. Moreover, they are required to deliver responsive repairs and fulfil mandatory safety and legislative checks.
- **Tenancy management.** SHG is responsible for lettings and rent management. A key part of this service is managing tenancies and estates such as managing anti-social behaviour, managing customer complaints, and providing a grounds maintenance service.
- **Choice-based lettings.** SHG is expected to process applications for rehousing in a timely manner in addition to overseeing the review process in respect of ineligibility and homeless decisions. The housing group has a responsibility for nominations for other social landlords, so they ensure nominations are provided within the agreed target time and update housing applications regarding outcome.
- **Supporting tenants.** SHG is responsible for homelessness, the vulnerable and the elderly, as well as private sector tenants. SHGs support around homelessness must involve providing comprehensive housing options advice and temporary accommodation that is both safe and clean.
- **Tenancy involvement.** This includes engagement, customer service and information, such as responding to complaints within ten working days and taking ownership of queries to resolve them and further strengthen customer influence over decision-making.

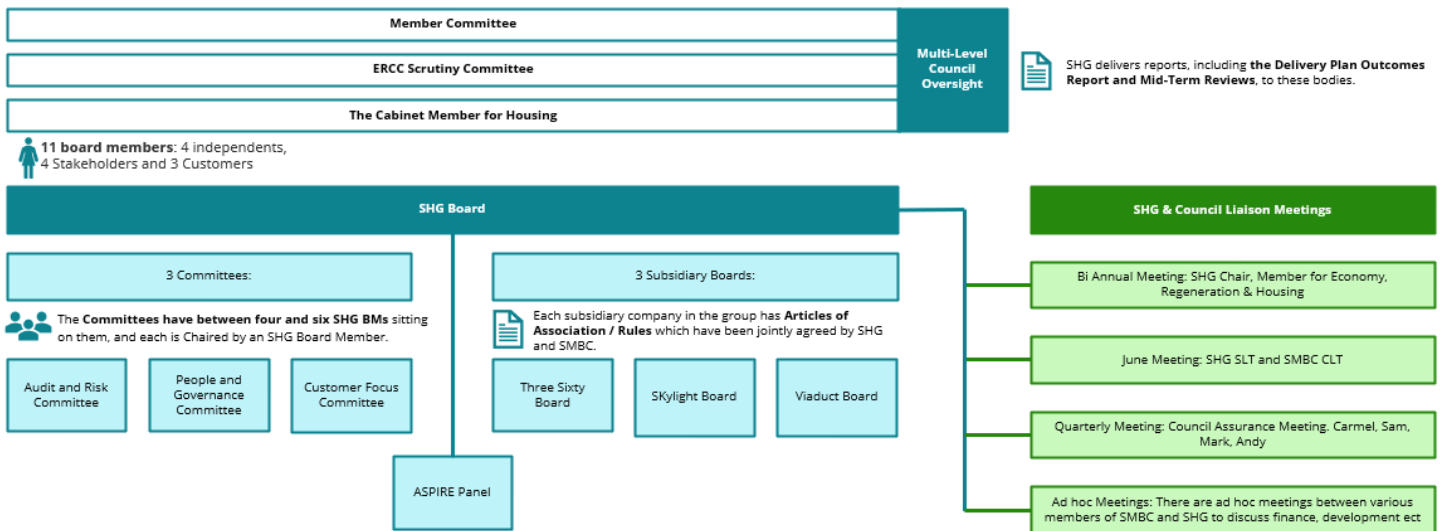
SHG also provides services that deliver wider outcomes for tenants and residents, many of which are delivered through SHG's charitable arm, SKylight. These include delivery of projects which focus on poverty, rough sleeping and supporting people to be independent and achieve positive outcomes in their lives, for example moving into volunteering and employment, and a dedicated money advice service. SKylight works with the council and infrastructure organisations support local civil society groups to:

- Continue to attract inward investment, grants and other resources
- Build their skills and sustainability
- Build partnerships which deliver in and benefit local neighbourhoods
- Work closely with One Stockport and Sector3 in the short, medium and long term.
- Raise the profile of Stockport groups to compete for national grant awards

SMBC and SHG work together and collaborate on local priorities. They have delivered the GM Housing First programme and the rough sleeper accommodation project, which have supported 26 individuals into stable housing.

While SHG provides a wide range of services, this review couldn't assess the effectiveness of each individual service or the appropriateness of them being delivered by SHG rather than another organisation. It is worth noting that SHG has adopted additional services, such as CCTV, given to it by SMBC, which aren't typically managed by housing ALMOs.

Overview of SHG governance



Key housing issues being faced in the borough

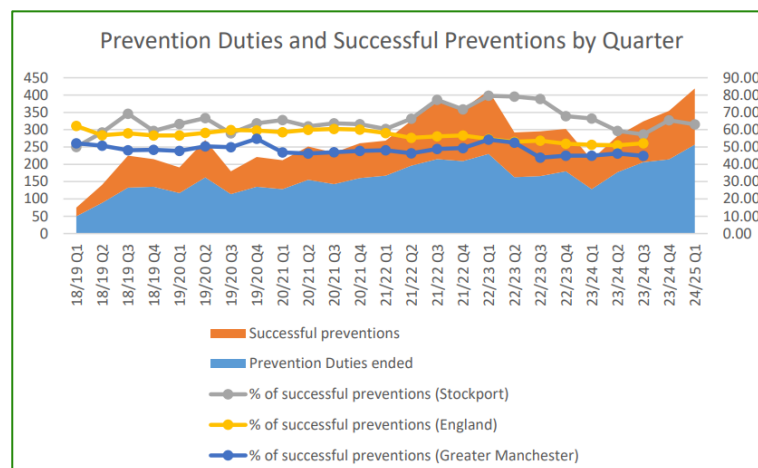
Stockport, like all boroughs across England, faces significant challenges in meeting the housing needs of its residents, particularly regarding affordability and the availability of sufficient and specific housing types. Data reveals with lower quartile house prices Stockport is less affordable than the English average. The lack of affordable, level-access dwellings for older residents seeking to downsize further compounds the issue. Addressing this need, particularly for older residents, isn't a challenge limited to the boundaries of Stockport but it's certainly a challenge that Stockport faces.

There is a significant challenge for SHG when providing tenant managing services such as supporting homelessness. Across the borough there are oversubscribed waiting lists, with 8,993 households registered for rehousing as at 30/11/2024, and a 12% rise in homelessness and the highest ever homeless presentations in 2023/2024. This has caused SHG's temporary accommodation units to fill, meaning the group has turned to hotels which cost £624,000 in 2023/24 with costs expected to exceed £1million. Rising housing costs and homelessness in Stockport are diverting SHG's resources. Temporary accommodation costs, exceeding £1 million, are impacting funding for core services. This situation necessitates a review of resource allocation to ensure the long-term sustainability of SHG's core services.

In the face of the homelessness crisis, SHG has worked proactively to mitigate these challenges. Stockport is ranked within the top 30% of local authorities in England for successful homelessness prevention rates and is one of the two Greater Manchester local authorities (Rochdale) where the number of prevention duties owed (828) exceeds the number of relief duties owed (587). Homelessness is a rising challenge across the country and the pressures facing Stockport are faced by all boroughs.

Key national housing issues being tackled by providers

There are four key themes across the sector nationally that make it harder for providers to deliver safe, affordable, and sustainable housing.



Firstly, **financial constraints**. Reducing government subsidies and public spending cuts limit the funding available for both new developments and the maintenance of existing stock. This, coupled with the UK's severe shortage of affordable housing, creates a pressing need for increased investment.

Secondly, ensuring the **quality, safety, and sustainability of social housing**. Whilst retrofitting older properties to meet modern standards is essential, it can be costly and complex. Improving energy efficiency and incorporating renewable energy sources requires significant upfront investment.

Thirdly, **social responsibility and the regulatory context**. Housing providers need to address the specific needs of vulnerable and marginalised groups, requiring tailored support services and housing solutions. They also need to stay compliant with new and evolving regulations which can be resource intensive.

Finally, **collaboration and engagement**. Engaging tenants to understand what matters to them and how services can be improved should be a priority. Partnering with industry, government and environmental organisations can provide access to expertise, resources, and funding opportunities.

What this means for SMBC & SHG: Stockport is facing large-scale strategic issues in terms of funding to maintain DHS, meeting the council's climate priorities and providing social housing for a wider, more complex range of tenant needs. It is crucial that there is strong alignment between both organisations to tackle the strategic issues.

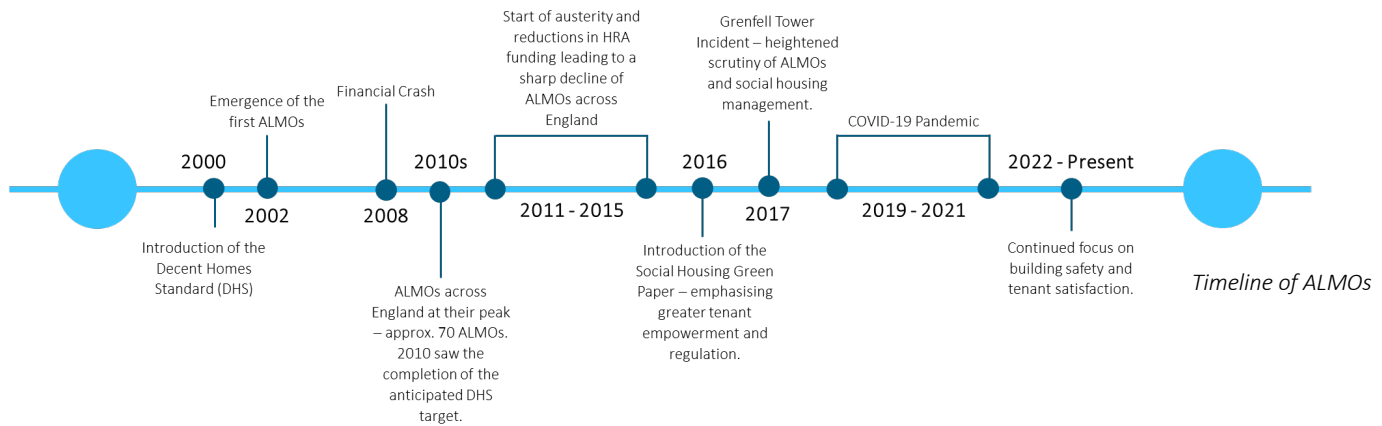
Asset management

The current asset management strategy (2023-2028) places emphasis on maintaining decent home standards and contributing to net zero ambitions. At the time of writing that strategy, to maintain decent homes standards, a funding gap of £147m was anticipated by 2033, with the prioritisation on this expected to limit the council's ability to hit net zero ambitions by 2038 with an estimated £178m of investment needed with a significant portion allocated to replacing gas boilers. Recent rent policy announcements, with the government confirming rent increases of CPI+1% for at least five years from 2025-26, means the funding gap has significantly reduced. However, it is clear HRAs across England still face pressures to afford all the demands placed on them. A new asset management strategy will be developed during 2025.

The AMP sets out a priority of maintaining DHS and statutory compliance over carbon objectives, which is in line with the requirement to meet the Regulator's consumer standards where DHS and statutory compliance are a fundamental aspect of the safety and quality standard. This prioritisation creates a significant risk of falling behind on sustainability targets and potentially exacerbating long-term costs, and new funding sources are required from government for all local authorities if they are to meet net zero targets; as with many of the housing challenges described in this review, this is a national problem and not specific to Stockport.

Background to the emergence of ALMOs

The early 2000s saw a surge in ALMO establishment, driven by the government's decent homes standard. However, as the programme reached completion, some ALMOs were brought back in-house due to funding cuts or a perceived redundancy in their role.



From 2011 onwards, there was a steady decline in ALMO numbers. Austerity measures, reduced HRA funding, and a desire for greater control over budgets and service integration led many local authorities to bring ALMOs back in-house. The Grenfell Tower tragedy further increased scrutiny on the social housing sector overall, prompting some closures due to performance concerns. The trend of ALMO closures continued from 2022 to 2024, driven by similar factors of financial sustainability and a desire for more integrated service delivery.

Leadership quality, organisational culture and tenant engagement play a crucial role in ALMO success. To ensure long-term sustainability, SHG must demonstrate efficiency, cost-effectiveness and alignment with the council's strategic priorities. This proactive approach, coupled with a willingness to explore innovative service delivery models and deepen collaboration with SMBC, will be crucial in navigating the evolving landscape of social housing provision.

Analysis of ALMOs that have been brought back in-house

Bringing ALMOs back in-house has mixed outcomes. While financial considerations are a factor, other variables significantly influence success. For example:

- Redbridge: Saw increased tenant satisfaction (77.3% to 81.5%) and reduced repair costs after reintegration, suggesting a successful transition.
- Slough: Experienced increased development but a significant drop in tenant satisfaction (77% to 59%), highlighting potential pitfalls.

The motivations behind ALMO closure are crucial. Councils prioritising tenant engagement (e.g., Basildon and Charnwood) may experience different results than those focused solely on cost savings. The transition process itself presents challenges. Sheffield and Wigan, for example, experienced increased re-let times and voids after reintegration, indicating potential service disruptions. For ALMOs being brought back into the council, the council's capacity and expertise are critical. Absorbing an ALMO's functions requires adequate resources and expertise to maintain service quality.

What this means for SMBC & SHG: The mixed experiences of local authorities who brought their ALMOs back in-house provides a lesson for SMBC: demonstrating value for money and a commitment to efficient, high-quality service delivery is paramount. While some councils achieved cost savings and improved tenant satisfaction through reintegration, many others faced unforeseen challenges and declining performance and poor outcomes for residents, as evidenced by adverse consumer regulation outcomes following inspections. This underscores the need for SHG to proactively address the concerns that led to this review and to demonstrate cost-effectiveness and a willingness to explore innovative and efficient service delivery models, such as shared services, that maximise efficiency and align with SMBC's strategic priorities.

Governance of ALMOs

ALMOs are governed by independent boards which can comprise a mix of residents, councillors/council nominees and independent board members, with each council determining the most appropriate structure. Given recent regulatory changes and broader pressures on the social housing sector, ALMOs have had to adapt their governance practices and operational processes to comply with new standards. Boards must focus on service quality and tenant voice. This board structure is one of the real strengths of the ALMO model, because boards can be elected to bring in relevant expertise and direction-setting.

Approximately 40% of ALMOs maintain the traditional third-third-third split between these three types of board members. The remaining ALMOs have shifted towards a greater proportion of independent board members. In fact, all but two ALMOs include tenant or leaseholder representation on their boards, with an average of three members. The average board size is 11 members. Nearly all ALMO board chairs are independent members, with only two exceptions where councillors hold this position. Three ALMOs have appointed senior independent directors (SIDs) to provide additional oversight and support to the board chair. Almost all ALMOs adhere to the NHF code of governance and conduct regular board effectiveness and arrangement reviews. These reviews can be conducted internally, externally, or in collaboration with the parent local authority.

SHG used to have councillors on its board, however, the council took the decision to amend the composition to now incorporate independent, stakeholder and customer board members.

List of existing ALMOs

- | | |
|------------------------------|-------------------------------------------------------|
| 1. Barnet Homes | 9. Northampton Partnership Homes |
| 2. Berneslai Homes | 10. Shropshire Towns and Rural Housing (STAR Housing) |
| 3. Blackpool Coastal Housing | 11. Solihull Community Housing |
| 4. Colchester Borough Homes | 12. South Essex Homes |
| 5. Cornwall Homes | 13. St. Leger Homes |
| 6. Derby Homes | 14. Sutton Housing Partnership |
| 7. Eastbourne Homes Limited | 15. Wolverhampton Homes |
| 8. Homes in Sedgemoor | |

TSM definitions

TSM reference	Satisfaction benchmarks
TP01	Overall satisfaction
TP02	Satisfaction with repairs
TP03	Satisfaction with time taken to complete most recent repair
TP04	Satisfaction that the home is well maintained
TP05	Satisfaction that the home is safe
TP06	Satisfaction that the landlord listens to tenant views and acts upon them
TP07	Satisfaction that the landlord keeps tenants informed about things that matter to them
TP08	Agreement that the landlord treats tenants fairly and with respect
TP09	Satisfaction with the landlord's approach to handling complaints
TP10	Satisfaction that the landlord keeps communal areas clean and well maintained
TP11	Satisfaction that the landlord makes a positive contribution to neighbourhoods
TP12	Satisfaction with the landlord's approach to handling anti-social behaviour

Deep dive into HouseMark data

Stockport compared with other ALMOs and other registered providers (RPs)

Analysis of data published by the National Federation of ALMOs (in collaboration with HouseMark) and SHG's outcomes report reveal a sector-wide decline in tenant satisfaction. This decline is driven by factors such as increasing repair times, a trend mirrored in SHG's identified backlog of repairs. The national average for non-emergency repairs completed within target timescale stands at 81.8%, highlighting the scale of this operational challenge. Furthermore, the rising cost of living, exacerbated by the gap in the local housing allowance, puts pressure on both tenants and housing providers, demanding innovative solutions to maintain affordability. High staff turnover, another sector-wide issue, underscores the importance of investing in staff retention and development to ensure consistent service quality.

Despite these challenges, ALMOs overall consistently outperform local authorities in tenant satisfaction, suggesting the model's inherent strengths in localism and tenant engagement. SHG's overall tenant satisfaction rate of 91.32% significantly surpasses both the national ALMO median (73.9%) and the local authority median (64.2%). This exceptional performance should be noted.

What this means for SMBC & SHG: SHG stands out as a high performer in the social housing sector. Their strong tenant satisfaction, commitment to building safety and proactive approach to addressing local needs that go beyond housing, position them well to work with SMBC on the strategic challenges facing Stockport. By continuing to prioritise tenant engagement, addressing operational challenges like the repair backlog, and embracing closer shared working, SHG will continue to deliver positive outcomes for the people of Stockport.

Stockport compared with other Greater Manchester providers

A comparison of SHG's performance against other providers is considered in the following areas drawing on the data provided in the Greater Manchester housing providers 24/25 Q1 non-TSM performance indicator benchmarks findings:

- Financial performance
- Tenant satisfaction
- Operational efficiency
- Damp and mould management

Financial performance: SHG demonstrates a strong financial position compared to other Greater Manchester housing providers, excelling in rent collection, arrears management and void control, which in turn creates more money in the HRA. However, a deeper dive into operating margins and cost per unit reveals a more nuanced picture – this is because SHG is being compared to registered social landlords (RSLs) that have more new build stock and very different loan profiles.

Void minimisation: Maintaining low void periods is crucial for financial sustainability. Stockport excels in this area, with a mere 0.60% of rent receivable lost through voids. This figure is considerably lower than the average (1.14%) and positions them favourably against top performers like Regenda (0.51%). This highlights efficient processes for re-letting properties and minimising vacancy periods.

Tenant satisfaction: Assessing tenant satisfaction is crucial for any housing provider. While the available data offers limited scope for a comprehensive evaluation, insights into SHG's performance relative to their peers by examining Housing Ombudsman determinations and customer satisfaction surveys can be understood.

Contact centre performance: SHG demonstrates a positive picture in contact centre performance. The average wait time for a call to be answered has been 1 minute and 57 seconds for the last three months. Their average

call handling time of 4 minutes and 18 second is comparatively the most efficient in the Greater Manchester area, and their call abandonment rate of 7.20% was better than that of Bury (28.33%) and Regenda (26.00%). However, it is worth noting that some providers, such as ForHousing with a 2.06% abandonment rate, achieved even better results in minimising call abandonment. This suggests that while Stockport performs well in this area, opportunities for further improvement in call handling processes or resource allocation might exist, warranting a closer examination of the practices employed by top performers to identify potential best practices.

Customer satisfaction with repairs: Data on customer satisfaction with repairs presents a mixed picture for SHG. While their "right first time" repair rate of 96.24% is commendable, placing them among the higher-performing providers in this metric, their customer satisfaction score of 81.31% falls short of several others. Bury, despite having a slightly higher first-time fix rate of 98.15%, recorded a lower satisfaction rate of 77.08%. This suggests that simply achieving a high first-time fix rate might not be sufficient to guarantee customer satisfaction with the overall repairs experience. Providers like Jigsaw (89.40%), Salix (90%), and Southway (90%) all demonstrate that achieving both a high first-time fix rate and a high level of customer satisfaction is achievable. This highlights the importance of considering other crucial aspects of the repair journey, such as communication, scheduling flexibility and the quality of interaction with repair staff.

The data suggests that focusing on aspects beyond the initial repair, such as communication throughout the process and the overall customer journey, could lead to greater tenant satisfaction. While the Housing Ombudsman determination numbers are not alarmingly high, a comparison with other providers suggests that reviewing and refining internal complaint handling processes could further reduce escalations and enhance tenant satisfaction. Gathering more comprehensive customer feedback across all service areas would provide a more nuanced understanding of tenant experiences and enable SHG to implement targeted improvements that address key areas of concern.

Operational efficiency: Operational efficiency is paramount for housing providers to deliver value for money and ensure smooth service delivery.

SHG excels in swiftly returning properties to the market, with an average re-let time of 14 days for homes not requiring major works. This figure significantly outperforms the average of 32 days and positions them favourably against most providers. Even for properties requiring major works, their 35-day average turnaround is notably faster than the 141-day average. This efficiency in re-letting not only maximises rental income but also minimises disruption for prospective tenants.

SHG exhibits a staff turnover rate of 4.58%, which aligns with the average across the analysed providers. This suggests that their staff retention strategies are effective. Most staff turnover is for promotion. SHG records a sickness rate of 2.52%, indicating a relatively healthy workforce. This figure is lower than several other providers, including Bury (5.11%) and RBH (5.28%), suggesting that SHG has effective measures and HR policies and working practices in place to support employee well-being and manage sickness absence which is particularly important for some of the frontline roles where staff are working with very difficult circumstances.

Damp and mould management: Damp and mould present significant challenges for housing providers, impacting tenant health and well-being, property conditions, and ultimately, organisational reputation.

Inspections and response times: SHG demonstrates a proactive approach to damp and mould, conducting a high volume of inspections relative to the number of reports received. This suggests a commitment to identifying and addressing potential issues. However, their average time from report to inspection, at 27 days, is longer than the average and significantly slower than providers like ForHousing (8 days) and Jigsaw (16 days).

This delay, while potentially influenced by factors like case complexity or resource availability, highlights an area for potential improvement to ensure timely intervention.

Review of performance and best practices of comparable housing providers and local authorities: Derby Homes

Derby Homes, a similarly high-performing ALMO, was identified as a suitable comparator for this exercise due to its relative proximity to Stockport, its experience with review processes, and the fact that it is seen as a peer of SHG in terms of consistently high performance in top quartile of ALMOs.

Derby Homes demonstrates effective collaboration and a robust, proactive relationship with the council. Through years of dedicated effort, Derby Homes has cultivated a strong partnership with the council, characterised by mutual respect and understanding. Central to Derby Homes' success is its multi-faceted approach to engagement with Derby City Council. This includes ensuring consistent representation of council members on the ALMO board, fostering early and active involvement of cabinet members in key discussions, and actively participating in various council boards and committees. This proactive and embedded approach ensures alignment on strategic priorities, facilitates open communication, and mitigates potential conflicts before they arise. This is further evidenced by the recent renewal of their agreement, a testament to Derby Homes' consistent performance, financial stability and ability to seamlessly support council objectives. The agreement underscores their commitment to continuous improvement, good faith, and robust governance, ensuring transparency and accountability in managing the council's housing assets.

Further solidifying this collaborative ethos is Derby Homes' nuanced approach to shared services. Whilst initially moving towards a fully integrated back-office model with the council, they strategically brought financial management back in-house, recognising the importance of maintaining direct control over key operational functions. This pragmatic approach underscores the need for a tailored approach to shared services, carefully considering which areas benefit from council involvement and which are best managed independently to ensure both efficiency and accountability. This focus on financial independence allows Derby Homes to support council services with significant annual savings, as highlighted in the agreement renewal report.

A prime example of Derby Homes' collaborative approach is its proactive response to the financial pressures of temporary accommodation (TA) costs and their impact on housing benefit subsidy loss. In 2021, Derby City Council spent just £7,500 on housing homeless families in temporary accommodation. This figure drastically rose to £360,559 in 2022-23 and soared to over £2.6 million in 2023-24. This surge was driven by a combination of factors, including rising mortgage interest rates, increasing private sector rents, the cost-of-living crisis, a shortage of social housing, and the council's reliance on expensive nightly paid accommodation like B&Bs, for which they could not claim full housing benefit subsidies.

Recognising the unsustainable strain on council finances, Derby Homes conducted a cost-benefit analysis of various TA solutions, which highlighted the significant benefits of owning purpose-built accommodations compared to relying on costly nightly paid accommodation, such as B&Bs and hotels. This analysis underpinned the decision in mid-2024 for Derby City Council to purchase the former Abbey Lodge student village for £12.5 million, with the goal of converting 96 flats for temporary accommodation. Derby Homes was then tasked with overseeing the purchase, refurbishment, and ongoing management of the facility, leveraging their expertise in property management.

This strategic partnership not only aimed to generate significant cost savings for the council by reducing reliance on expensive nightly paid accommodation but also sought to provide a more stable and suitable living environment for vulnerable families in need for temporary housing. This collaboration has exemplified how a

strong, trust-based partnership can leverage the unique strengths of both organisations to achieve mutually beneficial outcomes that directly improve service delivery and financial sustainability.

The tangible benefits of this collaborative spirit are evident in several other successful joint initiatives between Derby Homes and Derby City Council. For example, by assuming responsibility for managing temporary accommodation for children's services, they achieved significant cost savings for the council while simultaneously improving service delivery for vulnerable families. Additionally, they leveraged the council's commercial expertise to develop a private sector leasing scheme, demonstrating a proactive and innovative approach to tackling homelessness and mitigating the financial pressures of HB subsidy loss. These examples underscore the effectiveness of aligning ALMO activities with council priorities, fostering a mutually beneficial partnership that delivers tangible results for the community.

Beyond operational efficiency, Derby Homes prioritises transparency and open communication with Derby City Council, particularly regarding performance reporting. This commitment to transparency fosters trust and provides a solid foundation for collaborative decision-making. However, the chief executive acknowledged the importance of extending this transparency beyond the council cabinet, advocating for proactive engagement with a wider range of stakeholders, including local MPs and the public. This broader approach to communication ensures transparency, builds stronger community relationships and reinforces the ALMO's commitment to accountability. This is echoed in their delivery plan, which emphasises a "customer first" culture and utilises service reviews to drive continuous improvement.

Derby Homes demonstrates a keen understanding of the importance of strategic positioning within the local authority landscape. While proud of their individual successes, they prioritise a collaborative approach, readily sharing recognition with the council and actively working to avoid any perception of being overly dominant or independent. marked by a deliberate effort to share recognition and credit with the council, is essential for maintaining a harmonious and productive relationship, ensuring the ALMO's continued success within the broader local authority framework.

If SMBC and SHG fostered a more collaborative and deeply integrated relationship, akin to Derby model, this could unlock further potential for both organisations, leveraging one another's resources, aligning more effectively on strategic priorities and ultimately deliver even greater value to the people of Stockport.

Summary findings from comparator analysis

This comparator analysis, drawing upon national trends, regional benchmarks, and a deep dive into Derby Homes' best practices, reveals key opportunities for SHG to further enhance its service delivery by fostering a more collaborative and integrated relationship with SMBC

Appendix 2 – Documents reviewed and stakeholder engagement

Documents reviewed

Below is a comprehensive list of documents that were received from SMBC and SHG and were reviewed as part of the desktop analysis conducted in this review.

Documents reviewed
Stockport Metropolitan Borough Council
2009 Extension decision
2014 Options appraisal report
2015 Management agreement
2019 Housing needs assessment
23-24 Capital programme outturn report - 1 July 2024 member committee report
23-24 Compliance report - 1 July 2024 member committee report
Council assurance meetings - MG role overview
Management agreement
November 2023 scrutiny report
September 2024 scrutiny report
SMBC & SHG net zero ambitions
SMBC 24-27 council plan
SMBC council budget report 23-24
Stockport housing partnership 22-23 year-end report
Stockport housing partnership 23-24 year-end report
Stockport housing partnership overview
Tenant satisfaction measures (TSM) data return for SMBC
The one Stockport borough plan
The one Stockport housing plan
Stockport Homes Group
12a Appendix one - development financial parameters - major repairs
12b Appendix two - development financial parameters - detailed list of all parameters
21-22 Outcomes report
22-23 Outcomes report
23-24 Outcomes report
23-24 Q1 council assurance meeting minutes
23-24 Regulatory self-assessment for member committee - July 2024
23-24 SHG year-end performance report
Asset management strategy 2023 - 2028
Current asset management strategy
Customer assurance panel report
Customer feedback annual report
Customer scrutiny panel annual report
December 2022 SHG board report - asset management strategy
ERCC scrutiny committee report
Greater Manchester housing providers overview
HouseMark VfM comparison for NFA final report
Housing revenue account (HRA) budget and rent levels for 24-25
Member committee report - July 2024 - wider outcomes delivered by SKyLight
NFA - Analysis of TSM performance 23-24 final report
NFA - Presentation of 23-24 TSM analysis
NFA TSM and VfM presentation January 2024
September 2024 partnerships agreement

SHG - SMBC liaison arrangements
SHG 24-27 customer voice and influence strategy
SHG agreed remit - scope of the CAM document
SHG approved development strategy
SHG board - about us
SHG business plan 23-26
SHG business plan 23-26 (year one highlight report)
SHG corporate performance report
SHG customer annual reports
SHG customer engagement feedback policy / HOS self assessment
SHG data strategy 23-24
SHG delivery plan 21-26
SHG delivery plan mid-term review 21-26 (2024)
SHG delivery plan outcomes 23/24 & mid-term review of 21-26 delivery plan
SHG development parameters report and appendices
SHG member committee report July 2024
SHG P&OD annual update 23-24
SHG P&OD strategy 22-25
SHG scheme of delegation - March 2021
SHG TSM ward data - October 2024
SHG VfM strategy 24-27
Skylight board - about us
SMBC / SHG response to RSH - October 2024
Southwark report
Stockport local plan update
Tenant satisfaction measures insight report
Terms of reference for the ASPIRE customer panel
ThreeSixty board - about us
Viaduct housing board - about us

Stakeholders engaged with

Stakeholder list
Stockport Metropolitan Borough Council
Michael Cullen (chief executive, SMBC)
Paul Richards (deputy chief executive, SMBC)
Stockport Council CLT meeting for a focused meeting on the housing review
James Kington (strategic head of estates and asset management, SMBC)
Michelle Dodds (head of litigation and deputy monitoring officer, SMBC)
Frances Jones (head of strategy & operations, mayoral development corporation, SMBC)
Peter Ashworth (head of service – culture & leisure, SMBC)
Richard Mortimer (head of service – economy work and skills, SMBC)
Heidi Shaw (director of Stockport family, help and integration, SMBC)
Tim Bowman (director of education services, SMBC)
Jonathan Davies (assistant director, deputy S151, SMBC)
Vincent Fraga (assistant director of adult social care commissioning, SMBC)
Emma Curle (assistant director of planning, place making and planning, SMBC)
Jude Barker (assistant director of development and regeneration, SMBC)
Emma Stubbs (assistant director of neighbourhoods, SMBC)
Stockport Homes Group
Stockport Homes Group board (focus group)
Stockport Homes Group executive leadership team (1-2-1 interviews)
Stockport Homes Group tenant scrutiny panel (focus group)
Stockport Homes Group heads of service (focus group)
Stockport Homes Group managers and frontline staff (focus group)
Members
Cllr Mark Hunter and Cllr Colin Macalister (Liberal Democrats)
Cllr Matt Wynne and Cllr Asa Caton (Edgeley)
Cllr David Meller, Cllr Claire Vibert, Cllr Christine Carrigan (Labour)
Cllr Gary Lawson, Cllr Liz Crix and Cllr James Frizzell (Green)
Cllr Anna Charles-Jones, Cllr Carole McCann and Cllr Catherine Stuart (Independent Ratepayers)

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