

To: Wheatley Housing Group
By: Wheatley Group Scrutiny Panel

Tenancy Sustainment Thematic Review 2025

1. Introduction

The Wheatley Group Scrutiny Panel ("the Panel") independently review and scrutinise the performance, related to the Scottish Social Housing Charter, of the four registered social landlords ("RSL") which make up Wheatley Group ("the Group"). This covers: Wheatley Homes Glasgow ("WHG"), Wheatley Homes South ("WHS"), Wheatley Homes East ("WHE") and Loretto Housing ("LHA"). The Panel includes over 20 customers representing each of the Group's social landlords.

Under our Terms of Reference, by undertaking thematic reviews, the Panel can take a deeper dive into specific service areas or topics and where appropriate, make recommendations for how they can be improved for customers.

Supplementing other forms of customer insight and engagement, through their involvement in scrutiny, the Panel has helped the Group identify areas of improvement to enhance design and delivery of key services. This is evidenced, for example, through the Panel's thematic reviews on repairs communication in 2023 and environmental services in 2024. The environmental review was awarded 'Best Practice in Involving Tenants in Shaping Services' at the TPAS (Tenant Participation Advisory Service) National Good Practice awards in June 2025.

Following the success of previous thematics, in which customers agreed positive outcomes had been achieved, in 2025 the Panel decided to focus on tenancy sustainment, noting this differed from previous reviews as this was not a 'service' but rather a performance measure reported through the Annual Return on the Charter (ARC).

To inform the review, the 'spotlight' item at the Panel's December 2024 meeting was the Wheatley Foundation; the Group's charity that provides a range of wraparound support to help customers sustain their tenancies, among many other things.

Following this, tenancy sustainment was the spotlight item at the Panel's February 2025 meeting when the Managing Director of WHE and LHA provided an overview of the support we provide pre-tenancy to help achieve successful tenancies.

At the beginning of April 2025, members of the Panel who wished to take part in the review ("the thematic group") attended a planning session with key staff to discuss the proposed areas of focus in more detail. The thematic group decided that the review should focus on the support provided to customers while in their tenancy, mainly being through the Foundation and initiatives such as Home Comforts.

2. Brief and background

As detailed above, at the April planning session the thematic group decided the support provided by the Foundation to help customers sustain tenancies should be the focus for the thematic review. As per previous reviews, the thematic group developed a brief to:

1. Agree the review approach using lessons learned - information, frequency, scope;
2. Undertaking fieldwork – including site visits, review of information, staff and customer engagement;
3. Work together to develop report and prepare recommendations; and
4. Co-create solutions to recommendations with staff and promote their report.

The thematic review group members included:

- WHG - Gerard Lee, Gerard McAdam and Margaret McMillan
- WHE - Bridget Painter and George Watson
- WHS - Jenni Graham, Mary Muir and Elaine Tyler
- LHA - Jacqui Kelly, Alison McDonald and Morag Pearson

The thematic group was facilitated and supported primarily by Customer Strategy Officer, Louise Robertson, and Customer Strategy Manager, Morgan English. Throughout the review, meeting notes, requests for information and data, and action lists were maintained by these staff and circulated with the thematic group and internally to key business leads.

3. Methodology and information requested

Thematic meetings took place between April 2025 and September 2025; these were a mix of in-person and hybrid/virtual to allow the thematic group members to participate in a way that suited them. Following the planning session in April, throughout the review thematic group requested and received the following information, both quantitative analysis and qualitative insights, to inform their findings:

- Customer insight
 - MyVoice proposals to improve how we get customer feedback about Foundation services;
 - Customer testimony around Foundation support – video
- Performance analysis
 - Group-wide tenancy sustainment levels and performance trends across years;
 - Tenancy termination codes analysis;
 - Annual Tenant Visit performance data
- Service evaluation
 - Home Comforts programme and partner information;
 - Home Comforts referral and feedback forms; and
 - Proposals around digital promotion.

In addition, the thematic group wished to undertake site visits to understand and consider the different contexts and delivery of the Home Comforts service, which is operated in-house in the West, and by partners in WHS and WHE. This service provides free upcycled furniture to tenants in need.

In May, the thematic group visited the Home Comforts depot in Glasgow and discussed the new facility and how the service operates with the Group Environmental Support Manager. Panel members praised the depot for being well-equipped and maintained to high standards. All items are inspected for safety, cleaned, and stored in line with Revolve guidelines, ensuring quality and reliability.

Additionally, all electrical goods undergo Portable Appliance Testing (PAT) before distribution. Members found it valuable to observe the depot's operations first-hand and were impressed by the quality of the furniture and the robust quality assurance processes in place.

In June, WHS members visited the Foundation's Dumfries partner, SHAX. The visit was well received, with members impressed by the quality of work carried out to renew and upcycle furniture, giving items a second life while supporting tenants in need. All electrical items are PAT tested to ensure safety and reliability. SHAX also offers a collection service, making it easier for people to donate furniture. WHS Panel members appreciated experiencing the process in action and commented positively on the high standards and quality assurance in place.

Following the visits, the thematic group worked with the Group to develop a Customer Voice survey to gain further customer feedback about awareness of Foundation support. As requested, a version was also created for Group staff.

The survey was launched in August 2025 and was sent to over 670 Customer Voices (via text, based on communication and engagement preferences). It received 102 responses from tenants (15.2% return rate) and 53 from staff.

Thereafter, the thematic group took time to reflect on and consider all the information received, discussing the visits and insight from customer engagement. The thematic group worked with the Group to develop this report and agreed their recommendations.

Throughout the review, the thematic group engaged with a range of Wheatley Group staff including:

- Elizabeth Cuthbertson, Director Strategy and Performance;
- Laura Henderson, Managing Director of WHE and LHA;
- Lynne Mitchell, Foundation Director;
- Laura Crumlish, Foundation Manager;
- Stephen Geddes, Environmental Support Manager;
- Carol Burnett, Financial Wellbeing Manager of Wheatley Foundation;

- Paul McGuire, Foundation Programmes Officer;
- Michelle Breen, Housing Options Solutions Co-ordinator; and
- Stronger Voices Officers.

4. Key Findings

The thematic group worked hard to scrutinise information, processes and insight from customer engagement and site visits.

Survey findings:

In analysing the customer and staff surveys, the thematic group noted the results provided a snapshot in time. Of the 102 responses received from Customer Voices, the majority were from WHG (48%), followed by WHS (28%), WHE (23%), and Loretto (1%). While the response rate and method used were not considered representative, the surveys highlighted:

- Mixed awareness among customer respondents about various Foundation support projects and services. For instance, overall 51% were unaware of the Home Comforts project, 61% were unaware of MyGreatStart, and 71% were unaware of the Dolly Parton Imagination Library. However, there was good awareness of Financial Wellbeing Advice, with 57% of respondents being familiar;
- Strong awareness from staff about the support offered by the Foundation, ranging from 98% being aware of Home Comforts to 70% being aware of the Dolly Parton Imagination Library. In most cases, those unaware of support did not work in frontline housing, such as staff from Care or Wheatley Solutions (corporate services). All applicable staff had referred customers to the majority of the support initiatives.
- High levels of agreement that this support helps customers sustain tenancies, with 83% of customers and 80% of staff supporting this statement.

- The importance of support services being visible, accessible and personalised. When asked what could help strengthen the uptake of support services, customer respondents suggested enhanced advertising, including for access to welfare rights advice, and having designated support people for vulnerable customers, including those who do not qualify for welfare support and those with disabilities or mental health conditions.
- Personalised services were strongly emphasised, including annual well-being checks, low-cost garden maintenance services, and regular visits during the first year of tenancy.
- It was noted by the Panel these are also a focus for the Group, for example, through annual tenant visits (“ATVs”), where the target for 2025/26 is now 100%; a garden maintenance pilot launched in 2025, following recommendation from the environmental thematic; and ‘personalised services’ as a proposed theme for the 2026-2031 strategy currently being developed.
- From staff, suggestions for improvement included expanding partnerships with wellbeing and mental health agencies, restoring or enhancing support services around tenancy support, and improving pre-tenancy education about how to ensure a successful tenancy, such as budget management supporting skills for home decoration, and strengthening collaboration with the Foundation such as for ATVs.

Overall review findings:

- **Tenancy sustainment performance is strong.** The RSL Group achieved a strong overall tenancy sustainment of 93.27% in 2024/25, with Loretto top of that list with 96.23%. Overall, housing list applicants had the lowest sustainment at 91.55%. This, however, was primarily due to customers transferring to a new home within the Group. WHS had seen improvements from 86.1% in 2023/24 to 90.81% in 2024/25, following the launch of Foundation initiatives such as My Great Start. Analysis of the level of tenancy sustainment among different tenancy groups and reasons for failed tenancy revealed there were no noticeable trends.
- The Group performance was also higher than the Scottish average of 91.2%. Year-on-year performance has improved, with 2024/25 the strongest to date.

- **Annual Tenant Visits (ATVs) are key to identifying need** - and for referring customers to wraparound support to sustain their tenancies. For 2024/25, Group-wide ATV completion stood at 71.54%, exceeding the 70% target. WHS and Loretto surpassed targets, while WHE and WHG fell slightly short. The 2025/26 target has been raised to 100%, reflecting the strategic importance of ATVs.
- **Home Comforts is a priority service.** This service, delivered by Group in the West and partners in WHE and WHS, is instrumental in helping customers who require furniture at the start of their tenancy, or during their tenancy, receive this according to their need and preference, at no cost. This is especially important given Scottish Welfare Fund (SWF) cuts.
- **There is a high level of satisfaction** with the quality and cleanliness of items provided. Although, it was noted that methods of getting customer feedback and analysis this data are being improved, as customers' choice of items. Revolve accreditation ensures safety and environmental standards, but awareness among customers remains limited. A total of 289 new customers were supported in 2024/25, with 807 total referrals.

5. Recommendations

The **awareness of Foundation** services was a key theme identified by the thematic group, from customers and staff. It is important to note that while awareness raising of Foundation services is critical to promote impact and generate donations from the wider public, the services themselves are not available on a self-referral basis. Access to support is through referrals from staff, including housing officers, who play a critical role in identifying customers in need. This ensures Foundation services remain targeted and equitable. Therefore, in identifying any gaps, barriers and areas for improvement, the thematic group make the following recommendations:

1. **Raise awareness of Foundation services**, for example, through:
 - a) Promoting its impact and opportunities to support, volunteer and donate. Consider using promotional videos and customer testimonies on websites and social media, and information at sites;
 - b) Ensuring wraparound support is discussed during ATVs and sign up, so all tenants are fully informed about the services available for them to be referred to;
 - c) Promoting the support offered to key stakeholders, including elected members, who can help signpost customers to discuss this with their housing officer;
 - d) Promote Revolve accreditation across Wheatley's digital and customer-facing platforms including the website and social media. Highlight the quality, safety, and environmental benefits of the Home Comforts service and build greater customer understanding in its wider impact; and
 - e) Promote 'green initiatives', for example, upcycling workshops to increase, involve and upskill customers in this service.
2. **Improve data and insight**:
 - a) Enhance data and insight analysis from annual tenant visit conversations, such as tracking referrals to Home Comforts to inform tenancy sustainment approaches;
 - b) Roll out the MyVoice survey for Home Comforts and monitor response rates and feedback to inform improvements;
 - c) Review and streamline tenancy failure codes for improved analysis of reasons; and
 - d) Ensure insight from this review informs relevant projects, including the 'personalised services' theme for the 2026-2031 Wheatley Group Strategy.