Data Alignment
June 2021

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Background

CHC has previously collected and benchmarked housing association data on key metrics such as rent arrears and Universal Credit claimants. While this has been instructive, it became clear that there is significant variance in the way HAs collect and interpret data.

The measuring and reporting of housing management data has been identified as a key priority for both the Housing Management and Welfare Strategic Delivery Groups. At a joint SDG held in November 2020, members agreed to establish a Task & Finish Group to consider the possibility of sector collaboration and alignment on some key areas.

This briefing summarises the work and findings of the Data Alignment Task & Finish Group, and sets out proposals and next steps.

The Task & Finish Group

The purpose of the Task & Finish Group was to identify ways in which data collected in relation to housing management and welfare can be better aligned across the sector.

Reliable, benchmark-friendly data will give confidence and weight to our work, as well as allowing better comparison of best practice and regional differences. There has historically been confusion around definitions and interpretations, and this data alignment will provide some transparency around key terms and meanings. More robust and reliable data will also help tell the sector's story and provide evidence for CHC's influencing work.

The group included members from a range of roles, including housing management; rent and income; financial inclusion; data and business intelligence; continuous improvement; and finance. They were supported by Sarah Scotcher (Policy & External Affairs Project Officer) and both Laura Courtney and Will Henson (Policy & External Affairs Managers, CHC leads for Welfare SDG and Housing Management SDGs respectively).

The group were provided with the following brief:

> *Recognising that there is a significant variance in the way HAs collect and interpret data in areas such as rent arrears and Universal Credit claimants, the group will explore the feasibility and ways in which data can be better aligned across the sector. The group will seek to build on this to find common ways to measure and show the impact of changes – e.g. changes to the benefit system, the ongoing impact of the Covid-19 pandemic, etc.*
>
> 1. *Identify a shortlist of areas of welfare and housing management related data that it is possible to align across housing associations – and suggest a way in which the sector might achieve this. This needs to be really simple, and identify areas of data collection that are common across the sector.*
>
> 2. *Identify other areas that might be more difficult to align, but where problems occur with lack of alignment and work needs to be done – e.g. this might relate to the issue around 'self-payers'.*
>
> 3. *Discuss and define common approaches to understanding tenants' circumstances in relation to welfare and housing management in a more qualitative and person-centred way, in order to further sector understanding and practice development.*

Outcomes

The group met three times between January and April 2021. An update was provided to members at the Welfare SDG on 31st March.

Outcome	What	Why
Meeting 1		
Broad parameters	Focus on gross rent arrears and social rent tenants only	Start with a manageable area of focus
	Further investigate the 'five week wait' aspect of UC	Area of interest to members due to impact on tenants and arrears
Meeting 2		
Refine approach to gross rent arrears	Include social rent properties only, and rent and service charge only	Specific definitions avoid ambiguity and confusion
Timing of reports	Each HA picks date that works for them and their tenancy and payment cycles	Date does not need to be the same for sector, as long as it is consistent for individual HAs
Draft data fields and guidance notes (see below)	Agreed wording of fields, to be tested by T&F group	T&F group to produce a mocked-up report and feedback on any issues encountered
Meeting 3		
Feedback and improvement on draft fields	Agreement that data fields should be tried across the sector, with some minor changes	Exercise was fairly straightforward and should be scalable
Plan re consultation with sector	Before rolling out data fields: test principles and workability	Ensure key groups are aware and have opportunity to input

Data collection tested by T&F group:

Guidance notes

Definitions & interpretations
- *Social rent = anything covered by rent policy, including sheltered housing*
- *Gross arrears = rent and service charge only, regardless of payment type*
- *New tenancy = anything that prompts a new claim (and therefore a 5-week wait)*

Timing
- *Each HA can select a reporting date suitable for them and their tenancy and payment cycles*
- *This date will likely be towards the end of the month or the start of the next month*
- *This date does not have to be the same as that used by other HAs across the sector*
- *Each HA should use the same date from month to month*

Draft data fields

1. Please provide the gross rent arrears for January 2021.

2. Please provide the gross rent arrears for new social rent tenants for January 2021. Exclude older persons.
   a. 0-6 weeks into tenancy
      i. Those in receipt of UC
      ii. Those not in receipt of UC
   b. 6-12 weeks into tenancy
      i. Those in receipt of UC
      ii. Those not in receipt of UC

3. Please provide the number of new tenancies ending within 12 months as of January 2021
   a. Those in receipt of UC
   b. Those not in receipt of UC

NB : When we tested this question, we received responses that indicated differing interpretations. We would therefore like your feedback on this point (see 'Questions to consider').

Proposal

The T&F group proposes that the data fields shown below are rolled out and tested across the sector. These are the same fields as those piloted by the T&F group, with a few improvements.

Proposed data collection:

Guidance notes

Definitions & interpretations
- *Social rent = anything covered by rent policy, including sheltered housing*
- *Gross arrears = re: current rent and service charge only, regardless of payment type*

Timing
- *Each HA can select a reporting date suitable for them and their tenancy/payment cycles*
- *This date will likely be towards the end of the month or the start of the next month*
- *This date does not have to be the same as that used by other HAs across the sector*
- *Each HA should use the same date from month to month*

Qualitative information
- *Please provide any narrative, commentary or other detail that you consider relevant and useful alongside this data*

Draft data fields

1. Please provide the total number of social rent tenancies for [month] 2021.

2. Please provide the gross rent arrears for [month] 2021.

3. Please provide the gross rent arrears for new social rent tenants for [month] 2021. Exclude older persons.
   a. 0-6 weeks into tenancy
      i. Those in receipt of UC
      ii. Those not in receipt of UC
   b. 6-12 weeks into tenancy
      i. Those in receipt of UC
      ii. Those not in receipt of UC

4. *[A question to determine if there are greater numbers of UC tenancies ending within 12 months.] See 'Questions to consider'.*

Influencing

This data will allow us to explain to policy makers the extent to which social rent tenants who claim UC are in greater arrears than non-UC tenants at six and twelve months into their tenancies. It will help us understand whether there are greater numbers of UC tenancies ending within 12 months.

We will need to consider whether this is sufficient for our influencing work, or whether we need to collect the number of tenant arrears as a whole for those who claim UC, those who claim HB and those who do not claim housing related benefits. In doing this, we will need to consider the burden of the benchmarking process on HAs.

This data will be an invaluable source of evidence to support CHC's overall influencing work in relation to benefits and financial resilience.

Next steps

We will now gather feedback on this proposal from key groups within the sector, including the Welfare SDG, the Housing Management SDG and the Data & Performance Network. This briefing will be shared for information and discussions will be held at SDG meetings in mid/late June. We are seeking views on the principles and workability of the data fields and guidelines shown above

Once consultation with wider membership is complete, the T&F group will reconvene to discuss and reflect, and to decide on the timing of this data collection.

The above proposal shows the baseline data and a foundation to build upon, and in future members may wish to introduce additional measurements. This might include adding context to the arrears in terms of stock levels, percentage of income collected, average arrear per tenant, etc.

Questions to consider

- Do you agree with the approach taken and tested so far?
- If yes, would it be straightforward for your organisation to implement this approach (or similar) to data collection? Alternatively, would it be necessary for CHC to consult senior decision-makers via other SDGs?
- Should the data collection include any further data fields - for example, should we collect arrears data overall broken down by UC; HB; non-UC or HB tenants?
- Do you believe any other data fields need to be collected to assess the impact of welfare reform on arrears and tenancies over time?
- Question 4 seeks to identify the number of tenancies that end within 12 months. When we tested this question, we received responses that indicated differing interpretations. We would therefore like your feedback on the best, clearest way to ask this question.

Appendix: Snapshot data collection

While the T&F group's work was ongoing, CHC carried out a snapshot data capture of two more urgent measures in areas of high financial and/or political risk to the sector:

- UC claimants: the number of UC claimants HAs had among their social rent tenants in late Feb/early Mar 2020, and how many they had as of the same date in 2021
- Serious rent arrears: the number of social rent tenants who were in a) 8+ weeks and b) 13+ weeks gross rent arrears in late Feb/early Mar 2020, and how many as of the same date in 2021.

The purpose of this data capture was to assess the impact of the pandemic and inform work around addressing arrears, and was separate to the long-term work of the T&F group to shape future data collection and benchmarking. It did, however, provide the opportunity to test some of the principles established by the T&F work, and proved very useful in this respect.