



Job Title: New Tenancy & Exchange Officer	Role Profile Number: SBC_10602
LEVEL: CFL6	Date Prepared: June 2023
Directorate/Group: Service Delivery	Reporting to: Neighbourhood Housing Manager
Structure Chart attached:	Yes

Job Purpose

To manage a caseload of mutual exchanges as a specialist service. Verifying circumstances and determining eligibility to exchange, advising tenants and colleagues of the process and liaising with all parties concerned, both internally and externally.

Manage the process of new tenancy sign-ups from start to finish by efficiently executing both the digital and hard-copy versions in a time-critical manner, ensuring that performance targets are met. Exercising quality control of legal documents & data regarding both the property and the applicant/ingoing tenant; identifying errors and omissions.

To play a significant role in establishing excellent relations between the Council, its stakeholders and customers starting a new tenancy.

Key Accountabilities: Mutual Exchanges

- To manage and hold accountability for a caseload of mutual exchanges from application to completion, remaining in regular communication with all parties concerned, providing specialist advice to tenants, applicants, colleagues, contractors, Housing staff, Housing Association officers.
- Undertake the approval or refusal of SBC applicants to register on Homeswapper (digital advertising portal for mutual exchanges) by examining their tenancies and rent accounts.
- Use specialist knowledge to assess the eligibility of mutual exchange applications by demonstrating an understanding and implementation of Housing legislation (The Housing Act 1985 and the Localism Act), and to authorize or refuse the applications based on legal grounds. We are required to understand and interpret enforcement action that may prevent the m/ex from taking place.

- To assess eligibility to exchange in accordance with the Council's Allocations Scheme, ensuring best use of housing stock; to exercise careful decision-making and discretion in applying both the Allocations Scheme and the Housing Legislation to the assessment process.
- Interrogate the in-house OPEN HOUSING system in order to carry out all necessary investigative checks including the verification of tenancy type, the household composition and the applicants' conduct of current tenancies by understanding, interpreting and applying any enforcement action to the assessment of eligibility eg. Notices Seeking Possession, Court Orders.
Request and review tenancy references for applicants from other Social Landlords; identify suitability and any tenancy breaches.
- To identify the 'type' of secure tenancy (flexible to secure, secure OR secure 2020) and use this to determine the method and type of mutual exchange – *surrender & regrant* OR *assignment of tenancy*
- To have knowledge and understanding of succession rights and the impact the method of exchange (above) will have on the succession rights of those exchanging. Ensure this is communicated clearly to the applicants in written and verbal form.
- Identifying properties with welfare adaptations and ensuring that these properties are utilised appropriately by suitable applicants. Investigate the applicants' welfare/adaptation needs to determine whether the proposed property's existing adaptations are adequate, or whether the adapted property will be under-utilised and therefore unsuitable. Request and review necessary documentation from the applicant to support application eg. Proof of Enhanced PIP/DLA, medical records/letters from health professionals etc. Discuss the matter with the applicant over the telephone to clarify and identify any complex health or adaptation requirements to ensure that we have fully understood their requirements.
- Investigate and determine if clients are vulnerable, in receipt of benefits and/or will be subject to under-occupation charge (as per the Welfare Reform) at proposed new property, undertake affordability assessments in order to determine their suitability for the exchange. Understand and inform tenants of the implications of having a "spare" bedroom in relation to Housing Benefit/Universal Credit; have a good understanding of the Government's Under Occupation charge within HB and UC.
- To liaise with staff in other teams to ensure that all mutual exchange properties meet legal and health & safety requirements, including gas safety certificates, property inspections, EPCs and electrical checks.
- Identify out of date EPCs for our properties, raise purchase orders and submit to external contractor to carry out the assessment. Cross reference invoices against purchase orders to identify any outstanding orders; ensure invoices are submitted for payment.
- To liaise with external stakeholders and organisations such as Housing Associations, Women's Refuge and external contractors regarding the needs of the applicant and the property and to closely manage the progress of the exchange. Manage maintain those relationships in order to maintain good practice and efficient service to our clients.
- To undertake mutual exchange tenancy sign-ups; complete the sign-up checklist to inform the ingoing tenants of the key tenancy conditions and ensure they understand, confirm household occupants, obtain household income, any state benefits in payment, next of kin details, any external agencies involved with any household members and establish any debts owed in order to identify any vulnerabilities that may impact their ability to sustain a tenancy

- Identify mutual exchange applications where debt approval is necessary; liaise with Housing management and officers to ensure the relevant documents are completed and procedures followed. Evidence and file as appropriate.
- Establish current method of rent payment and discuss how rent will be paid post-exchange; make rent payment arrangements where appropriate. Understand and interpret rent accounts on existing tenancies including Housing Benefit entitlement, Universal Credit entitlement, Third Party Deductions, APAs, in order to advise on rent arrears and/or rent payable; ensure a clear rent account at the point of exchange; take rent payments & make arrangements for payment of rent in advance at mutual exchange sign-up.; identify if the tenant needs additional support from Tenant Money Advice Team and ensure that a referral has been made as necessary
- To set up tenancy start dates for new tenancies – end and create tenancies without the oversight of a manager
- Responsible for writing and updating procedure guides, accommodating significant and ever-changing work practices and officer responsibility
- To accurately record the mutual exchange applications on a central team spreadsheet and update the progress of each application regularly. Use this data to provide monthly and annual statistics and contribute to meeting the annual mutual exchange targets. Upload and enter all new tenants' information on to Sharepoint (electronic house file)
- Prepare and supply appropriate advice & information for tenant/applicants, ensuring it is reviewed regularly and updated. Provide advice over the phone or via email on how to apply for a mutual exchange with particular emphasis on encouraging the use of online methods of applying ie. Housing Hub's Homeswapper and Swaptracker.
- To assist in promoting mutual exchanges and other tenancy move opportunities to existing and potential tenants, supporting the Housing's wider aim of promoting and assisting with downsizing where necessary or appropriate.
- To ensure compliance with all corporate targets relating to good customer service, including responding to correspondence, answering the telephone and face-to-face contact with customers.
- To ensure the completion and accuracy of the local authority's CORE returns to the Central Administrative Team.
- To keep abreast of changes in Government policy through liaison with managers and of evolving good practice in relation to mutual exchanges, and to recommend/implement change as required.

SIGN UPS

- Manage and execute the creation of new tenancy sign-up packs (digital and paper) for the Housing Officers and new tenants once properties are ready to let; operate in a time-sensitive environment and manner to reduce void times and maximise rental income; use the newly-implemented digital document/signature system (DocuSign) for new tenancy sign-ups and oversee its completion.
- Responsible for the entirety of the digital sign-up process from start to finish; diligence and attention to detail required to ensure quality and accuracy of documentation from Lettings, Voids and Homelessness prior to its release; query and correct errors or omissions as necessary to ensure that the Neighbourhood Housing Officer and new tenant receives the correct documentation.
- Prepare and supply relevant advice & information for new tenants in their sign-up packs, and review the information on a regular basis to ensure it is up to date. Update information as necessary.
- Responsible for the counter-signing of legal documents such as tenancy agreements, Additional Tenancy Conditions and disclaimers, thereby creating legally binding contracts between the tenant and the Council. Arrange appointments with new tenants for collection of keys from the Council campus.
- Liaising effectively and frequently with other departments such as Voids, Lettings Assistants, Lettings Coordinators, Sheltered Housing Officers, Sheltered Housing Managers, NHOs, NHMs, customer services, social workers and support workers) and be prepared to challenge the validity and integrity of housing-related documents when errors/omissions are spotted.
- To execute the sign-up process and collection of keys in a timely and tenant-focused manner.
- Assist new tenants over the phone in completing the digital sign-up process when required
- Responsible for the creation of an in-house electronic filing system for sign-ups (O:Drive) and mutual exchanges, to accommodate the implementation of DocuSign.
- Support and assist the Council's transition to a new corporate, electronic filing system on Sharepoint; continue to upload relevant files to Sharepoint to ensure records are retained appropriately and in-line with GDPR requirements. *To ensure that all new tenants' information is entered on to record management systems, and that supporting documentation is scanned into the electronic house file;*
- Supervise and train apprentices and new starters, identifying and implementing their training needs
- To operate in a time-critical manner and manage the fast turnover of workflow.
- To respond to enquiries and complaints from customers, councillors and MPs.
- Organise the sign-up of tenancies for large-scale projects (eg. New builds) and government initiatives (Warm Welcome) by communicating effectively with other departments.
- To maintain accurate records relating to tenancy sign-ups; assist the Housing department in monitoring its performance and objectives. Contribute to meeting tenancy sign-up targets.
- To set up tenancy start dates for new tenants on OPEN HOUSING (re-let and maintain).

Supplementary Accountabilities

- To participate in equality and diversity training, information briefings and events as and when required as part of continuous professional development.
- To carry out all essential e-learning and attend any necessary training as directed by the Council.
- To promote equality and diversity best practices in all areas of work
- Ensure that any identified personal training needs are discussed with immediate supervisor/manager including being appraised in accordance with the Council's development and appraisal scheme, and to undertake a programme of continuous development.
- To meet with customers face to face in Reception
- To ensure that Data Protection policies are adhered to, safeguarding that disclosure of information is not made to the person other than the data subject unless approval is given by the person or whereby there are relevant disclosures in place.
- In accordance with the provisions of Health & Safety, take reasonable care so as not to endanger yourself or other persons at work; co-operating with the Council to enable it to comply with its statutory duties for health and safety
- Undertaking any other duties within the Tenancy Service team that can be accommodated within the grading level or post.

Knowledge & Experience

- Knowledge of Housing policy and legislation
- Ability to extract information from Housing Policy and interpret and apply accordingly without supervision
- Experience of working under own initiative and managing caseload;
- Be able to prioritise work and meet deadline whilst working under pressure
- Working in Housing-related field or similar is preferred.
- Experience of working under own initiative and managing caseload;
- Demonstrate attention to detail and accuracy;
- Considerable experience of customer service and resolving problems and queries - face to face, over the telephone and written communication
- . Excellent IT skills to include Outlook, Excel and Word and database systems, giving attention to detail and accuracy
- Excellent administrative skills

Qualifications

- GCSE Grade C or above, or equivalent qualifications in English and Maths.
- Housing Level 3 qualification is preferred
- Willingness to study towards a Housing qualification

Decision Making

- Assessing mutual exchange applications in line with the Council's Mutual Exchange policy, the Council's Allocations policy and national Housing legislation (The Housing Act 1985 and The Localism Act 2011) in order to determine eligibility to proceed with mutual exchange application;
- Demonstrate decision-making and discretion in applying both the Allocations Policy and the Housing Legislation to the assessment process;
- Understand and apply mutual exchange legislation (as above) in order to identify the correct grounds for refusal;

- Final approval or rejection of mutual exchange application;
- Deciding on the need for additional tenancy clauses and/or disclaimers in mutual exchanges;
- Deciding on the suitability of adapted properties for mutual exchange applicants;

Creativity and Innovation

- To suggest ideas for improving services to customers eg. Streamlining the DocuSign sign-up process;
- Presenting and updating communication documents for customers in line with changes to services

<u>Job Scope</u> Number and types of jobs managed Typical tasks supervised/allocated to others	Budget Holder Responsibility Asset Responsibility:	No
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Contacts and Relationships

- Written: Standard letters, non-standard letters, composing emails and assist with the completion of applications;
- Verbal: Giving specialist and general housing advice to customers and colleagues;
- Team: Work closely and collaborate with other officers, internal departments, social landlords and other partner organisations.

Values & Behaviours

We strive to underpin our culture of being ‘at our best’ through strong management and authentic leadership and getting the management basics right. We own and demonstrate accountability both individually and collectively with the aim of getting things right first time. To build on this we expect everyone at SBC to demonstrate and embrace our organisational values and behaviours by displaying:

1. **Accountability at all levels**
2. **Customer care and pride in what we do**
3. **Continuous learning and evaluation**
4. **Valuing one another and the contribution each of us makes;**

Self- Awareness

- Awareness of one's own behaviour, values, attitudes, strengths and weaknesses;
- Ability to reflect on one's behaviour and change them and change them when appropriate when interacting with others.

Integrity

- Authenticity
- Leading by example
- Follow the council's policy and procedures to ensure a consistent approach.

Collaboration

- Giving space to others and not imposing own views or judgements;
- Enabling development through co-creation and collective learning;
- Work effectively with other team colleagues.

Meaningful Relationships

- Is compassionate and accepting of others;
- Connecting with others at an honest human level;
- To be able to have meaningful dialogue and rapport with people from a wide range of backgrounds.

Resilience

- To be aware of and utilise personal strengths and resources to endure tough times;
- Keeping a positive outlook and using challenges as personal growth;
- Ability to manage in situations where there are demanding and challenging deadlines in order to meet performance targets.

Clarity of Intention

- Clear and effective communicator;
- Is purposeful and makes decisions that are clear, understood and properly recorded.

Other Key Features of the role

- Occasionally the post-holder will be expected to attend pre-arranged meetings in the evening or at the weekend.

Note:

This job description is intended as a general guide to duties attached to the post and is not an inflexible specification. It may therefore be altered from time to time to reflect the changing needs of the department, always in consultation with the post holder.

Housing is committed to working in a manner, which does not discriminate against any individual or group regardless of ethnic origin, sexual orientation, disability, age, religion or gender.