

Pearsons and St Elizabeth's Cottage Homes

Value for money self-assessment 2018

1. Policy Statement

- 1.1. Value for money means making the optimal use of all our resources to achieve our intended outcomes.
- 1.2. Resources generated from rental income are used to deliver excellent services to our customers in the most efficient way.
- 1.3. We use resources generated from utilising our assets effectively to maximise the amount of finance we can raise to build new homes.

2. Our achievements this year

- 2.1. We generated a surplus of £133,000.
- 2.2. Following a meeting in 2016 with the residents of the Trust to discuss use of the Trust's reserves, a Caretaker was appointed to manage the Pearsons Retreat site, including minor repairs and estate management. The feedback on this appointment has been very positive.
- 2.3. An increased planned maintenance program was also agreed at the meeting in 2016, and some of these works have been carried out in 2017/18 as the first year of the 3 year program.
- 2.4. The following achievements are those which the Trust benefits from by having Worthing Homes as its trustee and its day-to-day management performed by Worthing Homes.
- 2.5. We continue to focus on modernising our working practices and environment to be more effective and even better at what we do. We have invested in laptops and tablets and mobile working software that enables employees to work anywhere, this includes a new document management system and web access to our housing system. This enables us to place greater emphasis on more flexible ways of working as we move away from the traditional office environment and traditional management methods. We have provided digital mobile working tools to colleagues who previously did not have access to this, along with on-going training, to ensure all of our employees are digitally included. During the year we have also implemented:
 - An app for employees to access customer and property information, health and safety information and training documents when working away from the office
 - An app for the completion of job tickets for our internal labour teams
 - A paperless e-post system
 - E-forms for completion whilst mobile working
 - An e-learning platform for health and safety

- A self-serve Payroll and HR system
- 2.6. During 2016/2017 we reviewed our customer service strategy which reviewed how we are equipping all our teams to deliver excellent customer service. During 2017/18 we re-structured our Customer Experience Team to better meet the challenge of providing a one-stop-shop for customers.
 - 2.7. During the year we implemented arrears analytics software which will enable better management of our arrears. We envisage that this will save 1.2FTE of an Income Recovery Officer.
 - 2.8. We have further invested in digital inclusion to help our residents gain greater skills on-line and via social media. Residents have free access to Wi-Fi and access to the internet at the Pearsons Retreat site, plus the community house, our office reception, resource centre, and Love-it hub as well as new free wi-fi installations at our other sheltered schemes during 2016/17. Our Resource Centre is an 'IT junction' in partnership with Worthing Borough Council and is run voluntarily by our residents who impart their IT skills and knowledge to others. Customers are encouraged to use on-line services for benefit applications and home swap services.
 - 2.9. We continue to streamline our empty homes process to make this more efficient. This work has led to our lettings performance getting significantly better with our average re-let time for the Trusts' properties falling significantly from 18 days to 11 days. As a result our rent loss from empty properties was just 0.4%.
 - 2.10. We are actively providing financial inclusion advice and signposting advice to our residents and help combat the impact of welfare reforms such as the benefit cap.
 - 2.11. Along with our financial inclusion co-ordinators, our income recovery officers had a successful year helping residents maintain their rental payments and minimise arrears. The Trusts' arrears were 0.5% at the end of the year.

3. Our plans for next year

- 3.1. We will continue to generate surpluses. However some will be re-invested in an increased planned maintenance programme at the request of the Trust's residents.
- 3.2. We will implement our customer service strategy. This includes a review of our phone system to ensure we have the best tools for our new approach where all calls come in to the customer service team initially.
- 3.1. We have a forward thinking digital strategy with an emphasis on reducing costs incurred in supporting transaction based activities which could be processed more efficiently and effectively by taking advantage of more streamlined digital methods.
- 3.2. We will launch our customer app and customer portal thereby unlocking the potential for customers who can self-serve to access their information, rent accounts and job tickets much quicker and simpler.

- 3.3. Our digital inclusion work allows our residents to learn how to get online and make the most of internet access. We have already installed free Wi-Fi in our reception and all of our sheltered schemes and run a successful computer group in the Resource Centre, this is open to all the community and offers structured training classes from beginners to more advanced and 1:1s. We will be offering residents more opportunities to interact with us digitally with on-line access to their rent accounts and repairs. We have recently signed up to a digital champion's scheme with Digital Unite which will enable us to build a network of local digital champions.
- 3.4. We are actively providing financial inclusion advice to residents needing support managing their money. We will continue to engage with and build up relations with other organisations, including the DWP, to ensure we can assist our residents with the impact of welfare reform.

4. Service delivery costs and outcomes

- 4.1. During 2016/17 we reviewed our customer service strategy to ensure that the way in which we deliver services meets the needs of both current and future customers. A Customer service survey was undertaken across the trusts customers to gauge customer satisfaction.
- 4.2. The overall rating (92%) was one of many ratings in the 90s awarded by Pearson's and St Elizabeth's residents. Very high satisfaction was recorded with the quality of the home, neighbourhood, value for money of the rent, speed of repair work, outcome of customer contact, dealing with general enquiries (91% to 96%). In addition virtually all residents felt that Worthing Homes has a good reputation in their area, staff are friendly and helpful and that they trust Worthing Homes (92% to 96%).
- 4.3. The results from our STAR survey compared to our previous survey:

	2016	2012	Change
Services provided by landlord	92%	95%	(-3%)
Quality of home	96%	93%	(3%)
Neighbourhood as a place to live	92%	85%	(7%)
Value for money of rent	96%	93%	(3%)
Value for money of service charge	88%	88%	(0%)
Repairs & maintenance service	88%	85%	(3%)
Quality of repair work	88%	96%	(-8%)
Ease of contact	71%	90%	(-19%)
Dealt with quick and efficiently	85%	95%	(-10%)
Final outcome of contact	91%	84%	(7%)
Keeping residents informed	88%	92%	(-4%)
Listens to views and acts on them	62%	83%	(-21%)
ASB	68%	75%	(-7%)
Complaints	63%	80%	(-17%)
Good reputation in area	92%	94%	(-2%)
Friendly and approachable staff	96%	95%	(1%)
Trust Worthing Homes	95%	95%	(0%)
Treats you fairly	88%	89%	(-1%)

5. Return on assets

- 5.1. We ensure that we have a real understanding of the performance of all our assets (properties) to ensure we maximise the return on these assets. This will be delivered through our updated asset management strategy and monitored through our asset appraisal model with the ultimate aim of improving the quality and financial performance of all our homes, as well as, reducing the running costs for all our customers.
- 5.2. These return on assets objectives are underpinned by our stock condition database and revised Asset and liabilities register which will be further developed during 2018/19. The stock condition data held against every asset will be re-assessed on a 5-year cycle with this data and resulting long term investment levels.
- 5.3. Focusing on the whole lifecycle of a home from development, improvement and repair, disposal and stock rationalisation; our asset management strategy will ensure that we invest in the right physical assets to the right standard, in the right places for the right cost and for the right return.

6. Social value

- 6.1. Recording the social impact of our existing activities provides us with an opportunity to ensure the services we deliver offer value for money and maximise the return on our investment, while meeting our organisational objectives. The residents of the Pearson's and St Elizabeth's Cottage Homes can benefit from a number of activities that have a positive impact upon the lives of our residents and others in the local community. These activities are run by Worthing Homes.
- 6.2. The Resource Centre continues to be used by Aspire providing Maths, English and ALD courses; Southdown Housing for a peer support group, the National Careers Service and Impact Workability as well as providing our own benefit, financial support and energy saving drop-in service our Sure Futures course and IT classes for the community of which there were 47 new learners last year. Of those undertaking the IT classes 5 recorded they had gone into self-employment; 31 had achieved part time work; 4 undertaking vocational training, 40 were doing regular volunteering and 1 person said they were doing an apprenticeship.
- 6.3. Our Lovett Hub is used by a number of different groups every week including Aspire Sussex, The Empty Plate Café, Buddies Café, Guildcare, Adur and Worthing Council for their weight management programme weekly and Food Pioneers Breathing Spaces for ad hoc sessions. The Hub continues to be used by the Community House on an ad hoc basis. For the third year running, a community group have cooked Christmas day dinner for Lovett Court residents and members of the community who have no one to share Christmas day with continues to be very popular.
- 6.4. From December 2016 "Feeling Good" fitness sessions have been taking place in all sheltered schemes in Worthing Homes. This has identified just how popular such interventions were but also crucially the potential health gains felt by those involved. Last year there were a number of stories of how people had managed to change their lives significantly as a result of this intervention and we are looking for similar impact this year. There is one change however this year as we seek to involve people from outside the schemes. Previously this was for the scheme residents but this time we are looking to broadcast this as a service for all residents 60 and over. We believe that through this direction we can bring in new people addressing isolation and loneliness issues in the wider community and also encourage their participation in wider scheme activities over time.
- 6.5. Neighbourhood Fund - from April 17- March 18 we distributed money to a number of causes following agreement from the Resident Panel: Pearson's Social Group, money for a family BBQ with games - £307 awarded. Heene School, wooden benches and planter for their new playgroup on the former Jolly Brewer site - awarded £500 and resident Sandra Pryor to set up an afterschool art club for the children in the local area of Winterberry Way - awarded £500. Total awarded between April 17-March 18 was £1,307.

- 6.6. Fun Day – we had 673 people last year and numerous other organisations as well as our own stalls who were able to give information about their services which would be of benefit to our residents. This is the third year of increase in attendees for the day.
- 6.7. We are continuing to build on our sustainability offer with more advice and drop-in sessions available for residents and staff. This year has seen Solar Panels fitted to our Community House and we are in the process of procuring Solar Panels for Davison House, reducing Worthing Homes’ carbon footprint and bills. A survey of the insulation in our properties will inform a plan to upgrade or replace old or faulty insulation with the intention of saving tenants’ money on heating bills. We are, again, teaming up with Southern Water to offer free water efficiency visits for our customers, where Southern Water can give tips and install different products to help residents save water and money. Our sustainability co-ordinator offers fuel poverty training for frontline colleagues and is co-ordinating the fuel poverty network in Worthing. We support local sustainability initiatives financially and practically, lead the County Fuel Poverty Network thus placing Worthing Homes at the forefront in the pursuit of reducing costs for Residents and energy efficient homes. We also have an arrangement with nPower to issue £30 fuel poverty vouchers. Over the last winter 29 vouchers were issued at a cost to nPower of £1,513.80.
- 6.8. We see combining financial and social value as a key factor in robustly ensuring we deliver value for money for our customers.

7. Financial Performance

- 7.1. The trust continues to maintain a strong financial position with a surplus in 2018 of £133,000 (2017: £144,000).
- 7.2. Overall we have achieved an operating surplus of 33%.
- 7.3. The trusts reserves total £2,181,000.