

Pearsons and St Elizabeth's Cottage Homes

Value for money self-assessment 2017

1. Our achievements this year

- 1.1. We generated a surplus of £144,000.
- 1.2. We completed the purchase of the 6 flats at Pendle from Worthing Friends (Quaker) Housing for £277,000. These self-contained flats are a good fit with the trust's other properties and the trust's principle aims and activities.
- 1.3. Following a meeting with the residents of the Trust to discuss use of the Trust's reserves, a Caretaker was appointed to manage the Pearson's site, including minor repairs and estate management. The feedback on this appointment has been very positive. An increased planned maintenance program was also agreed at the meeting.
- 1.4. The following achievements are those which the Trust benefits from by having Worthing Homes board as it's Trustee and it's day-to-day management performed by Worthing Homes.
- 1.5. 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:
 - A contractor portal where contractors log their job completions and costs, and invoice periodically rather than for each job. One of our two largest contractors who went live in May 2016 invoiced us with 480 invoices in 2016/17 compared to 2,500 invoices the previous year.
 - A texting service for arrears stage 1 and 2, and for ad hoc communications with customers. During the year 3,424 arrears stage 1 & 2 texts were sent costing 10p each which would previously have been sent by letter at a greater cost of approximately £12 each.
- 1.6. We have a new procurement coordinator who has achieved net savings this year on several contracts including:
 - Windows and doors procured over a 5 year contract, using a contractor we have not worked with before. This will give a saving of £200,000 on a contract of £700,000 when compared to our previous contractors.
 - A £44,000 saving on our mobile phone contract against the renewal offer from our previous supplier by switching to the Procurement for Housing framework.

- Negotiated a fix to our schedule of rates with our two largest reactive maintenance contractors until 2022 and 2023.
- 1.7. In October, our RedAssure service began offering housing related support to up to 2,000 older residents in Worthing Homes and Adur Homes properties. The service had previously only supported 280 Worthing Homes and Pearson's residents. This service receives funding from West Sussex County Council and we are one of only 3 landlords West Sussex County Council elected to work with to deliver such services in the county following significant cuts to funding to support older residents in the community. By merging our support and telecare functions into one team, we are now able to deliver a more holistic service to more customers and made savings on salaries and expenses of £48,000.
 - 1.8. 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 Pearson's 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.
 - 1.9. 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 33 days to 18 days. As a result our rent loss from empty properties was just 0.4%.
 - 1.10. 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. This year our financial inclusion co-ordinators assisted almost 400 of our customers to increase their income and reduce their bills. Overall their worked gained an extra £211,088.28 income for a number of our customers.
 - 1.11. 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 0.4% at the end of the year. With laptops and tablets that enable them to work remotely, they have been able to significantly increase the number of customers they visit in their homes, with one income recover officer managing to reduce their overall arrears from 2.1% to 1.8%.
 - 1.12. We have continued to build on our sustainability initiatives with more outreach sessions available for residents and staff at the Love-it Hub and Community House. Our Sustainability Co-ordinator has been developing our Relish website and is in the process of putting lots of links to videos and instructions on the website showing customers how to use some of the more household facilities such as heating controls and how to save energy and money at the same time. We have teamed up with Southern Water to set up free water efficiency visits for our customers, where Southern Water can give tips and install different products to help residents save water and money. We also secured funding allowing us to offer gas central heating to many of our customers who

still have night storage heaters. Our sustainability co-ordinator offered fuel poverty training for frontline colleagues and is now co-ordinating the fuel poverty network in Worthing.

2. Our plans for next year

- 2.1. 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.
- 2.2. 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.
- 2.3. We will be working with our customers to further improve our customer service especially in areas where our 2016 survey results are lower than our previous survey.
- 2.4. We will continue to create new activities and opportunities for our residents to retain their health and independence, such as art classes and keep fit initiatives.
- 2.5. We continue to focus on modernising our working practices and environment to be more effective and even better at what we do. Our digital strategy for next year includes:
 - A customer app with access to rent account balances and job tickets and basic personal details.
 - A customer portal with access to rent account balances, job tickets, logging of compliments and complaints, basic person details.
 - Continue to roll-out our contractor portal, targeting our largest contractors.
 - Implementation of the 365Agile employee app so everyone has appropriate access to information regarding our properties and customers whilst mobile working. This includes the implementation of electronic forms, both to be stored in our electronic document management system and to write back information to our housing management system.
 - Implementation of a job ticket app linked to our housing management system for our in-house maintenance team.
 - Process mapping and streamlining and digitalising processes to achieve maximum efficiency.
- 2.6. 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.

3. Strategic approach

- 3.1. Value for money means ensuring the best social outcomes using the resources available.

- 3.2. Obtaining value for money from our resources is essential to ensure we can continue to provide excellent services to our residents, deliver new homes and invest in our community.
- 3.3. This VFM self-assessment demonstrates to our residents and other stakeholders how we are achieving this aim. We publish this information to all our stakeholders on our website, within our annual report to residents, and within the strategic report in our financial statements.
- 3.4. Our corporate plan sets out our business priorities and how we will deliver our business objectives. This is informed by our financial business plan to ensure what we do is affordable and does not jeopardise the long term viability of the business. Our annual VFM self-assessment sets out a number of key principles to ensure our activities focus on maximising VFM, what we are achieving for the resources used and our investment plans – not only in terms of the quality of services we provide but also report the wider effect of our work in terms of social, environmental and financial impact and outcome.
- 3.5. The corporate plan and key priorities are monitored by the senior leadership team with quarterly reports to the board on progress against the targets. Individual departmental targets are reviewed at team meetings and personal targets at each member employee's one to one meetings with their manager to ensure the accountability and effectiveness of every member of our team. Quarterly service standard performances are reviewed by our residents' panel and reported to the Trustee.
- 3.6. In setting the corporate plan and budget for the coming year the Trustee sets targets that will achieve efficiency gains and service improvements each year. Budgets are set using a zero-based budgeting approach. The Trustee receives quarterly reports on our finances to monitor against detailed budgets to ensure that financial objectives are achieved and funding covenants maintained. Activity based costing continues to form the basis of our evaluation of the cost effectiveness of each of our services.
- 3.7. The residents' panel reviews areas of work of their choice, commissioning in depth scrutiny of our services. The panel is provided with performance and financial data, as well as facilitated wider research of residents' views. This enables the panel to make informed and objective recommendations to our board on value for money and service improvements measured against the service standards agreed with our residents.

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. Social value

- 5.1. 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. We undertake a number of activities that have a positive impact upon the lives of our residents and others in the local community.
- 5.2. Our resource centre continues to be used by other community groups for 60 hours per week delivering training and advice on employment, benefits and energy advice. We also run IT courses at this venue with 84 new learners signing up in the last year, and of these 12 have gone into part-time work, 5 have found full-time employment, 5 have

gone into self-employment, 19 take part in regular volunteering and 3 have undertaken vocational training. This service is available to the Trust's customers.

- 5.3. From December 2016 "Feeling Good" fitness sessions have been taking place in all sheltered schemes in Worthing Homes. 34 out of 37 responders noted the course as Very Good (92%) 3 said they felt the training was Good (8%). Participants are reporting that they are more alert and physically more subtle but also that they are more engaged with the wider resident community in the scheme. The project featured in the Guardian on the link below :

https://www.theguardian.com/society/2017/may/10/sheltered-housing-schemes-new-challenges-cuts?CMP=Share_iOSApp_Other

- 5.4. We see combining financial and social value as a key factor in robustly ensuring we deliver value for money for our customers.

6. Return on assets

- 6.1. We have a comprehensive approach to managing our assets having strategies for asset management, development and sustainability. 'Asset management' is considered as a range of activities that ensure the housing stock meets needs and standards both now and in the future. The considerations contained within the strategy must be balanced with customer (resident) aspirations, resources as well as professional and technical considerations and value for money.
- 6.2. Financial Performance:-
- 6.3. The trust continues to maintain a strong financial position with a surplus in 2017 of £144,000 (2016: £155,000).
- 6.4. Overall we have achieved an operating surplus of 36%.
- 6.5. The trusts reserves total £2,036,000.