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Date: 24th June 2015

Dear Sir/Madam,

A meeting of the **Caerphilly Homes Task Group** will be held in the **Sirhowy Room, Penallta House, Tredomen, Ystrad Mynach** on **Thursday, 2nd July, 2015** at **5.00 pm** to consider the matters contained in the following agenda.

Yours faithfully,

A handwritten signature in blue ink that reads 'Chris Burns'.

Chris Burns
INTERIM CHIEF EXECUTIVE

AGENDA

	Pages
1 To receive apologies for absence.	
2 Declarations of interest.	
Councillors and Officers are reminded of their personal responsibility to declare any personal and/or prejudicial interest(s) in respect of any item of business on this agenda in accordance with the Local Government Act 2000, the Council's Constitution and the Code of Conduct for both Councillors and Officers.	
To approve and sign the following minutes: -	
3 Caerphilly Homes Task Group held on 21st May 2015 (Minute nos. 1 - 9).	1 - 4
4 Tenant Support for Universal Credit - Presentation	

A greener place Man gwyrddach



Correspondence may be in any language or format | Gallwch ohebu mewn unrhyw iaith neu fformat

To receive and consider the following reports and make recommendations to the Policy and Resources Scrutiny Committee and Cabinet: -

5 Caerphilly Homes Communication Strategy and Implementation Plan. 5 - 24

To receive and note the following information items: -

6 WHQS Position Statement. 25 - 36

7 WHQS Performance Monitoring 2014-15 (Full Year). 37 - 52

8 To receive any requests for an item to be included in the next available agenda.

Circulation:

Task Group Members: L. Ackerman, Mrs G. Atkins, Mr C. Davies (Vice Chair), Miss E. Forehead, K. James, Mrs B. A. Jones, Ms S. Jones, Miss A. Lewis, C.P. Mann, Mr M. McDermott, Mrs D. Moore, Mr J. Moore, D.V. Poole and Mrs D. Price (Chair),

And Appropriate Officers



CAERPHILLY HOMES TASK GROUP (WELSH HOUSING QUALITY STANDARD)

MINUTES OF THE MEETING HELD AT PENALLTA HOUSE, YSTRAD MYNACH
(SIRHOWY ROOM) ON THURSDAY, 21ST MAY 2015 AT 5.00 P.M.

PRESENT:

C. Davies- Vice Chair (Presiding)

Task Group Members:

Mrs G. Atkins, Ms E. Forehead, K. James, Miss A. Lewis, C. Mann, M. McDermott, J. Moore and D.V. Poole.

S. Couzens (Chief Housing Officer), P. Davy (Head of Programmes), M. Lloyd (Deputy Head of Programmes), J. Roberts-Waite (Strategic Co-ordination Manager) P. Smythe (Housing Repair Operation Manager), and C. Evans (Committee Services Officer).

1. APOLOGIES

Apologies for absence were received from Ms L. Ackerman, Mrs B. Jones, Mrs S. Jones, Mrs D. Moore and Mrs D. Price.

2. CHAIR'S (PRESIDING) ANNOUNCEMENTS

C. Davies, Presiding Chair to the Caerphilly Homes Task Group referred to the recent passing of Councillor Ray Davies and all present extended their condolences to the bereaved family. The Task Group noted his long and distinguished career in local government, the manner in which he had carried out his duties and the high esteem in which he had been held by Members, Officers and the Community, and commended his contributions to the Task Group.

It was noted that Councillor Gerald Jones was recently elected as MP for Rhymney and the Task Group extended their congratulations and best wishes for the future and welcomed the new Members, Councillor Elaine Forehead and Councillor David Poole to the Meeting.

The Task Group extended their congratulations to Mrs G. Atkins on her recent marriage and wished her all the best for the future.

3. DECLARATIONS OF INTEREST

Mrs G. Atkins, Mr C. Davies, Miss A. Lewis, Mr M. McDermott, and Mr J. Moore as Council Tenants declared a personal but not prejudicial interest in all agenda items.

Mr C. Davies declared an interest in item 4, relating to the Community Improvement Fund. Details are minuted with the respective item.

4. MINUTES – 2ND APRIL 2015

RESOLVED that the minutes of the meeting held on the 2nd April 2015 be approved as a correct record and signed by the Chair.

5. COMMUNITY IMPROVEMENT FUND.

Mr C. Davies declared an interest as a resident of Twyn Carno and having involvement in the project. Mr Davies left the meeting during its consideration and Miss A. Lewis presided as Chair.

The report provided details of an application made for funding from the Community Improvement Fund by Pen Y Dre Tenants and Residents Association. The Pen Y Dre Tenants and Residents Association are a constituted organisation with the aim of improving housing conditions, the environment and amenities within the ward of Twyn Carno and have applied for £5,000 to help finance the cost associated with installing a play facility within the local community.

The total cost of the project is estimated to be £89,052.00 (VAT component £14,842.00), and two quotes for the entire project have been included with the application. The Council have awarded planning permission (with conditions) to the Association to install a fixed and informal play facility. A 25 year lease has been agreed. The Task Group noted that due to the pressure on the MTFP revenue costs can only be guaranteed for 2015/16 for maintenance.

The Task Group thanked the Officer for the report and sought further information on the funding available. Officers explained that the Community Improvement Fund has an allocation of £50,000 per year, with a maximum of £5,000 grant for capital costs for individual projects, which have to demonstrate that they would benefit the community.

Following consideration of the report, it was moved and seconded that the Caerphilly Homes Task Group support the application made by the Pen Y Dre Tenants and Residents Association. By a show of hands this was unanimously agreed.

RESOLVED that for the reasons contained in the Officer's report, the Caerphilly Homes Task Group support the application which will have a positive impact on tenants living within the adjacent housing areas subject to the follow:

- Confirmation of what products/materials will be financed via the CIF.
- The award of additional funding from the CFP (WG Communities Facilities Programme) and the Community Regeneration Fund (approval letters to be provided)
- The Association is advised there is no guaranteed maintenance funding beyond 2015/16 and they should make contingency arrangements, including appropriate insurance cover.

C. Davies returned to the meeting and chair, following the debate and vote.

6. WHQS COMPLIANCE.

The report provided details of the new requirements from the Welsh Government (WG) in relation to verification and maintenance of the Welsh Housing Quality Standard.

The Task Group noted that Social Housing Landlords are required to put in place a Compliance Policy by 01.04.16 and review it annually. The Compliance Policy is intended to provide the Welsh Government, tenants and the Council with assurance that WHQS will be

achieved and maintained. The Policy will form the basis for an independent verification process. The report outlined the Welsh Government requirements, sets out the timetable and consultation arrangements.

Having considered the report, the Task Group sought further information on the Officer working group. The Officer highlighted that the Officer working group has now been established and is made up of key WHQS Officers overseeing areas such as finance, data management and community benefits.

Following discussion, the Task Group queried the current information submitted to WG and the process. Officers explained that an annual return is completed which demonstrates the number of properties in total, and the number of which are WHQS compliant. The new requirements would ensure that Caerphilly CBC are progressing in order to achieve WHQS by 2020 and providing sufficient evidence to demonstrate this.

The Caerphilly Homes Task Group thanked the Officer and noted the report.

7. HOUSING REPAIR OPERATIONS ANNUAL PERFORMANCE UPDATE.

Paul Smythe provided an update on the annual performance of the Housing Response Repair Service, which was developed by the newly formed Housing Repairs Operations (HRO) Team, against each of the Response Repair categories to deliver the housing repairs service.

The Task Group considered information on the level of customer satisfaction obtained following the introduction of telephone and face to face customer satisfaction surveys along with some of the other achievements that have been made through working in close partnership with the Repairs and Improvement Group, such as the introduction of the Relet standard, Recharge Policy, Handy Person Service and joint maintenance responsibilities.

The Task Group thanked the Officer for the positive report and discussion ensued, noting the improvements achieved in the service and performance.

A Task Group Member sought clarification on the reduction in the Response maintenance budget and the reason for which this was applied. It was noted that there has been a reduction of £600,000 to the budget, which reflects the number of works that were WHQS related and therefore conducted under WHQS funding. There has been a notable change in the system for repairs and an increase in customer confidence, which has seen an increase in repairs reported and expectations of tenants increased.

Members sought further information on the categorization and process associated with Emergency Repairs and the impact of WHQS on the service. The Officer highlighted that Emergency repairs are considered a priority and associated with water, gas or electricity; however, not all reported emergency repairs are genuine cases. The Task Group noted that when the repair is completed and satisfaction survey is conducted any dissatisfaction is followed up and corrected where possible. In addition, works conducted under WHQS, can have an impact on workloads.

The Caerphilly Homes Task Group noted the report.

8. OLDER PERSONS HOUSING – FULL YEAR PROGRESS REPORT

The report provided the Task Group with an update on the progress made by the Older Persons Housing Team through the implementation of the new service model and the positive changes made in relation to the development of this service area.

Since the commencement of the new service generally people are happy with the service being delivered (81%) in sheltered housing schemes. Tenants can feedback through tenant meetings and the tenant's satisfaction survey and reasonable adjustments will be made where possible to improve the experiences of tenants.

In response to feedback from tenants a notice board has been introduced on the office door of all Sheltered Schemes with the name of the covering officer and their times at the scheme. Reassurance calls are being piloted in three schemes to consider whether these can be rolled out to all tenants interested in opting into this service.

The newly established Floating Support service has resulted in positive outcomes for older people living in council properties. Feedback from the survey was very good and our aim for this service is to market further to reach more people that need services.

The Task Group thanked the Officer for the report and were pleased to note the changes and impacts on tenants.

Clarification was sought on the variation in figures and follow up on the feedback reports.. The Officer clarified the figures and explained that satisfaction surveys are sent to all tenants, some of which may not have a specific package of support, therefore some of the questions would not be of relevance. On receipt feedback from tenants, follow up meetings have been conducted and needs met or adaptations implemented as a result of an identified need or, in a case where assistance is not available at present, on-going communications are under way.

Discussions took place around the Residential Meetings, their purpose and locations. The Officer explained that meetings are conducted across the borough, encourage a community feel within the Sheltered Schemes and are an opportunity to provide a number of services and opportunities such as hair and beauty treatments and themed dances.

The Caerphilly Homes Task Group were pleased to noted the report.

9. TO RECEIVE ANY REQUESTS FOR AN ITEM TO BE INCLUDED ON THE NEXT AVAILABLE AGENDA

There were no requests for items received to be placed on the next available agenda.

The meeting closed at 6.04 p.m.

Approved as a correct record subject to any amendments or corrections agreed and recorded in the minutes of the meeting held on 2nd July 2015.

CHAIR



CAERPHILLY HOMES TASK GROUP – 2ND JULY 2015

SUBJECT: CAERPHILLY HOMES COMMUNICATIONS STRATEGY & IMPLEMENTATION PLAN

REPORT BY: INTERIM CHIEF EXECUTIVE

1. PURPOSE OF REPORT

- 1.1 To present members of the Caerphilly Homes Task Group with a new communications strategy and action plan for implementation. The report is seeking the views of CHTG prior to its consideration at Policy and Resources Scrutiny Committee, and thereafter Cabinet.

2. SUMMARY

- 2.1 Effective communications is essential to ensuring all stakeholders have an awareness of the Caerphilly Homes brand and are kept up to date on progress across the housing service. Key to effective communications is the delivery of timely messages, using a range of methods appropriate for specific target audiences. But, more than simply sending messages out, effective communication also relies upon creating opportunities for open and transparent two way dialogue with stakeholders.
- 2.2 The draft strategy and action plan proposed in this report replace the former 'Housing and WHQS Communications Strategy' which elapsed in 2015. The new draft strategy strongly advocates a 'one housing service' approach to communications in order to more effectively embed the Caerphilly Homes ethos throughout the division.

3. LINKS TO STRATEGY

- 3.1 The Welsh Housing Quality Standard (WHQS) is intended to ensure that all local authority and housing association homes are improved and maintained to achieve specified standards.
- 3.2 The Council is committed to ensuring that the WHQS investment transforms not only homes but also lives and communities.
- 3.3 The Single Integrated Plan 2013-2017 has a priority to "improve standards of housing and communities, giving appropriate access to services across the County Borough".
- 3.4 The Council's Local Housing Strategy "People, Property, and Places" has the following aim:
"To provide good quality, well managed houses in communities where people want to live, and offer people housing choices which meet their needs and aspirations."
- 3.5 Other relevant internal strategies include the corporate communications strategy 'One Voice' and Caerphilly Homes' local tenant participation strategy.

4. THE REPORT

4.1 Effective communications is essential to ensuring all stakeholders have an awareness of the Caerphilly Homes brand and are kept up to date on progress across the housing service. Key to effective communications is the delivery of timely messages, using a range of methods appropriate for specific target audiences.

4.2 There had previously been very little evaluation carried out with regards communications activities and service user involvement in this had also been limited. For example, whilst service users are asked to provide feedback on specific tenant communications, via Armchair Reviewers, there had been no formal mechanism in place for gaining their input on our general approach to communications.

Without evaluation or feedback from our service users, we do not know how effective our communications with them are and whether we are achieving value for money through our current activities.

4.3 As the former 'Housing and WHQS Communications Strategy' came to an end in 2015 it seemed timely to use this as an opportunity to undertake a communications review with stakeholders. In order to achieve this, a working group of tenants and staff was established with support from the Tenant and Community Involvement Team. The group met in a series of workshops which were facilitated by the Communications and Tenant Engagement Officer.

During the review process, a number of key questions were asked including:

- What are our current goals and objectives for communications?
- How well is the current communications strategy / plan working?
- How clear, consistent and persuasive are our messages?
- What communications have been most effective?
- What do stakeholders think of our communications?
- What would make our communications more effective?
- What communications opportunities are we missing?

4.4 The review also gave recognition to work that has taken place to raise the Caerphilly Homes profile since the stock transfer ballot. Strengths identified by the group include the increased opportunities provided for informal engagement with tenants, including attendance at high profile events and smaller scale estate based events. Other successes recognised by the group included the increased use of different mediums, including the damp and condensation information video and the community film project 'Let's Get Happy'.

4.5 As well as a great deal of positive work, the review also highlighted a number of areas where improvement is needed. Particular themes that arose during the review were the need for greater consistency and coverage in communications across Caerphilly Homes, to ensure stakeholders are aware of the range of services delivered by the council's housing division. Also, whilst the work undertaken to develop a clear brand identity was congratulated, there was agreement that further work is needed to ensure that the brand and Caerphilly Homes ethos is embedded throughout the housing division.

The lack of tenant profiling data was also flagged as a concern, as this information is vital if we are to target our communications and engagement activities more efficiently and effectively.

4.6 Communications and customer service are intrinsically linked; with effective communications necessary to deliver high levels of customer service and vice versa. The review included a session which focussed specifically on customer service, which raised a number of issues affecting the end service received by customers. The issues raised included poor internal communications and a lack of consistency in the standards of customer care throughout the division. Many of the actions contained within the associated action plan aim to address some of these issues, particularly those pertaining to internal communications. Separate work

is also being undertaken by the HR Development Officer, in conjunction with the communications strategy, which focusses upon customer service.

- 4.7 The Caerphilly Homes Communications Strategy for 2015-18 covers the range of services delivered by Caerphilly Homes and takes a whole service approach to communications. By doing so it aims to ensure consistency across the housing division and address the issues highlighted around internal communications.
- 4.8 For the purposes of this strategy, a number of target audiences have been identified and divided into two groups – internal and external stakeholders:

Internal stakeholders:

- Caerphilly Homes staff
- Local elected members
- Other council departments, e.g. Communities First, Highways, Education

External stakeholders:

- Tenants
- Leaseholders
- Applicants / prospective tenants
- AMs and MPs
- Welsh Government
- Housing associations
- Suppliers and contractors

- 4.9 The key aims and objectives of this strategy, developed through the communications review process, are:
1. To raised the awareness of stakeholders on:
 - a. The range of services we provide
 - b. How to access our services
 - c. Our performance in providing these services
 - d. How they can influence our services
 2. To promote Caerphilly Homes' reputation locally, regionally and nationally.
 3. To develop a consistent brand image and positive identity for Caerphilly Homes.

A plan has been produced, accompanying the strategy and this report, which sets out the shorter term actions needed to deliver these aims and objectives. The plan was developed in conjunction with the communications working group and is based upon SMART principles to ensure it can be delivered, measured and monitored effectively. Regular monitoring reports on the delivery of this plan will be presented to the Caerphilly Homes Task Group.

5. EQUALITIES IMPLICATIONS

- 5.1 An EqIA has been completed in accordance with the Council's Equalities Consultation and Monitoring Guidance and no potential for unlawful discrimination and for low level or minor negative impact has been identified. Therefore a full EqIA has not been carried out.

6. FINANCIAL IMPLICATIONS

- 6.1 There is a dedicated annual communications and tenant engagement budget of £49,646. A fully costed action plan for implementation of the strategy accompanies this report.

7. PERSONNEL IMPLICATIONS

7.1 This report has no direct personnel implications.

8. CONSULTATIONS

8.1 The views of consultees listed are incorporated within the report.

9. RECOMMENDATIONS

9.1 The CHTG supports a recommendation to the Policy and Resources Scrutiny Committee and Cabinet to adopt the communications strategy and action plan.

10. REASON FOR THE RECOMMENDATION

10.1 In order to provide a clear strategic direction for Caerphilly Homes in its approach to communications.

11. STATUTORY POWER

11.1 Housing Acts and Local Government Acts. This is a Cabinet Sub-Committee function.

Author: Kelsey Watkins, Communications and Tenant Engagement Officer
(Tel: 01443 864262, Email: watkik1@caerphilly.gov.uk)

Consultees: Cllr. David Poole, Deputy Leader & Cabinet Member for Housing
Cllr Barbara Jones, Deputy Leader & Cabinet Member for Corporate Services
Cllr Ken James, Cabinet Member for Regeneration, Planning & Sustainable
Development
Phil Davy, Head of Programmes
Shaun Couzens, Chief Housing Officer
Nicole Scammel, Acting Director of Corporate Services and S151 Officer
Jane Roberts-Waite, Strategic Coordination Manager
Stephen Pugh, Corporate Communications Manager
Mandy Betts, Tenant and Community Involvement Manager

Appendices:

Appendix 1 - Communications Strategy

Appendix 2 - Communications Action Plan

Caerphilly Homes Communications Strategy

2015 - 2018

1. Introduction

Effective communications is essential to ensuring all stakeholders have an awareness of the Caerphilly Homes brand and are kept up to date on progress across the housing service.

Key to effective communications is the delivery of timely messages, using a range of methods appropriate to specific target audiences. But, more than simply sending messages out, effective communications relies upon creating opportunities for two way dialogue with stakeholders; by actively engaging them and using their feedback to improve services.

This strategy replaces the former 'Housing and WHQS Communications Strategy' which elapsed in 2015. A considerable amount of work has taken place since the last strategy was produced, which will be reflected upon and used as a foundation for this strategy and associated action plan.

2. Where are we now?

Stakeholders have been heavily involved in the development of this strategy, through a working group of tenants and staff facilitated by Caerphilly Homes' Communications and Tenant Engagement Officer. Tenant members of the group varied between those currently heavily involved in service deliver, e.g. Task Group members, to those who have had minimal involvement to date, i.e. Armchair Reviewers. Staff members of the group were also spread evenly across Caerphilly Homes' different areas of service delivery, to ensure adequate representation and a range of viewpoints from across the division.

Members of the working group:

Tenants

- Sandra Jones
- Max McDermott
- Barbara Brown
- Margaret Gardner
- Ken Bridgeman

Staff

- Kevin Fortey, Housing Enabling Officer (Housing Strategy)
- Andrew Jeffries, Senior Housing Officer (Housing Repair Operations)
- Rachel Williams, Service Development Officer (Public Sector Housing)
- Lisa Vokes. Senior Administrator (WHQS)
- Richard James, HR Development Officer

The working group met on a task and finish basis to undertake a review of existing communications methods and to develop the strategic direction for communications over the next three year period.

The review gave recognition to work that has taken place to raise the Caerphilly Homes profile since the stock transfer ballot. Strengths identified by the group include the increased opportunities provided for informal engagement with tenants, including high profile events such as Blackwood Beach Party and smaller scale estate based events. Other successes recognised by group included the greater use of different mediums, for example the damp and condensation information video and the community film project 'Let's Get Happy'.

As well as a great deal of positive work, the review also highlighted a number of areas where improvement is needed. Particular themes that arose during the review were the need for greater consistency and coverage across Caerphilly Homes, to ensure stakeholders are aware of the range of services delivered by the council's housing division. Also, whilst the work undertaken to develop a clear Caerphilly Homes brand and identity was congratulated, there was agreement that further work is needed to ensure the brand and ethos are embedded throughout the division.

The lack of tenant profiling data was also flagged as a concern, as this information is pivotal if we are to target our communications and engagement activities efficiently and effectively.

The findings from the review have been incorporated in this strategy and associated action plan. The working group also worked to develop many of the actions included in the implementation plan.

3. Definition and scope

This strategy covers the range of services delivered by Caerphilly Homes and aims to take a whole housing service approach to communications in order to ensure consistency across the division.

The following list provides a summary of some of the services delivered by Caerphilly Homes:

- Public Sector Housing
 - Estate management
 - Tenancy enforcement
 - Rents
 - Tenancy support
 - Tenant and community involvement
 - Older persons housing
- Housing Repair Operations
 - Response repairs
 - Planned maintenance
 - Handy Person service
- Private Sector Housing
 - Housing advice / homelessness / allocations
 - Housing strategy
 - Affordable housing

- Private rented sector
- Adaptations
- Housing grants and loans
- Welsh Housing Quality Standard
 - Internal and external improvement programme
 - Environmental improvement programme
 - Transforming lives and communities agenda
 - Tenant liaison service

As well as publicity and promotion of services, this strategy also includes the development of effective engagement and opportunities for real two way dialogue with stakeholders.

This strategy also has links to the corporate communications strategy 'One Voice' and to Caerphilly Homes' Local Tenant Participation Strategy. The review also highlighted a number of issues relating specifically to customer care, which will be picked up as a separate piece of work being undertaken by the HR Development Officer.

For the purposes of this strategy, a number of target audiences have been identified and divided into two groups – internal and external stakeholders:

Internal stakeholders:

- Caerphilly Homes staff
- Local elected members
- Other council departments, e.g. Communities First, Highways, Education

External stakeholders:

- Tenants
- Leaseholders
- Applicants / prospective tenants
- Welsh Government
- AMs and MPs
- Housing Associations
- Suppliers and contractors

4. Strategic aims and objectives

The key aims and objectives of this strategy, developed through the communications review process, are:

1. To raise the awareness of stakeholders on:
 - The range of services we provide
 - How to access our services
 - Our performance in providing these services
 - How they can influence our services

2. To promote Caerphilly Homes' reputation locally, regionally and nationally.
3. To develop a consistent brand image and positive identity for Caerphilly Homes.

5. Implementation of the strategy

A plan has been produced which sets out the shorter term actions necessary to achieve the strategy. The plan was developed in conjunction with the communications working group and is based upon SMART principles to ensure it can be delivered, measured and monitored effectively. The action plan will regularly be reviewed and revised, as necessary, to reflect our changing needs.

In implementing the strategy and action plan, we will ensure that the diverse needs of our customers are taken into account; for example, by ensuring written materials and venues are accessible to all.

6. Resources

The Communications and Tenant Engagement Officer is responsible for the delivery of the strategy and associated action plan; the officer is supported by a Programme Support Assistant.

A dedicated Communications and Tenant Engagement budget of £49,646 (aligned to the activities outlined in the associated action plan) has also been allocated to facilitate the implementation of this strategy.

Wherever possible we will seek to work in partnership with other relevant agencies, such as Communities First, in order to pool our resources and deliver maximum outcomes for local communities. We will also seek to enhance this strategy and further maximise outcomes for tenants through the delivery of community benefits from our contractors and suppliers.

7. Monitoring

Delivery of this strategy and its accompanying action plan will be monitored by the Caerphilly Homes Task Group. Update reports will be provided to the group by the Communications and Tenant Engagement Officer at regular intervals or upon request from the Caerphilly Homes Task Group.

In line with Caerphilly Homes' commitment to ensuring tenants are placed at the heart of decision making, an annual review of the action plan will also be undertaken with tenants and staff.

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Key Aim 1 – To raise the awareness of stakeholders on the range of services we provide, how to access our services, our performance in providing these services and how they can influence our services					
What?	Why?	Who?	When?	How will it be measured?	How much will it cost?
1.1 Further develop and improve tenant newsletter by: <ul style="list-style-type: none"> Actively seeking input from tenants into content of newsletter via Armchair Reviewers, social media etc Establish newsletter editorial panel 	<ul style="list-style-type: none"> To ensure newsletter remains tenant focussed and contains a variety of content. 	Kelsey Watkins	Beginning July 2015	<ul style="list-style-type: none"> Feedback from Armchair Reviewers Random tenant telephone surveys 	<ul style="list-style-type: none"> Tenant newsletter currently sent twice per year at total cost of £16,500 per annum
1.2 Maintain Caerphilly Homes quarterly media planner	<ul style="list-style-type: none"> To ensure consistency in coverage across Caerphilly Homes. To maintain a regular flow of 'good news' stories and ensure stakeholders are kept fully up to date on Caerphilly Homes services. 	Joanne James	Ongoing	<ul style="list-style-type: none"> Regular input from managers across Caerphilly Homes Information fed into corporate media planner 	N/A
1.3 Reinstate staff bulletin	<ul style="list-style-type: none"> To ensure staff are kept fully updated on activities across Caerphilly Homes and our performance in different areas of service delivery. 	Joanne James	Beginning July 2015	<ul style="list-style-type: none"> Bulletin containing mix of content from across Caerphilly Homes sent to staff every 6 weeks 	<ul style="list-style-type: none"> £800 pa

<p>1.4 Utilise existing opportunities to capture tenant communication preferences, e.g. via TLO/TSO visits, social media, etc</p>	<ul style="list-style-type: none"> • To allow us to target our communications effectively and efficiently, e.g. sending electronic newsletters to those who request it to reduce printing and postage costs. • To ensure our communications materials are accessible to all, e.g. in alternative languages, braille, large print, etc. 	<p>Kelsey Watkins / Joanne James</p>	<p>Beginning July 2015</p>	<ul style="list-style-type: none"> • Database compiled of tenant communication preferences 	<ul style="list-style-type: none"> • No costs associated with gathering data as this will be done as part of existing contact with tenants. • Data may lead to some financial savings if sufficient numbers of tenants request contact via email.
<p>1.5 Increase and improve use of social media:</p> <ul style="list-style-type: none"> • Increased postings on existing social media channels, in line with media planner • Develop campaign to increase engagement on current social media channels • Explore opportunities for use of other social media channels, including potential for staff engagement 	<ul style="list-style-type: none"> • To actively engage with those tenants often seen as 'hard to reach.' • To raise awareness of stakeholders on the range of services provided by Caerphilly Homes and how they can influence services. 	<p>Kelsey Watkins / Joanne James</p>	<p>Beginning June 2015 and ongoing</p>	<ul style="list-style-type: none"> • Number of page 'likes' and 'followers' • Increased post engagement 	<p>N/A</p>
<p>1.6 Schedule of events for elected members, including:</p>	<ul style="list-style-type: none"> • To ensure members are kept fully updated on 		<ul style="list-style-type: none"> • Road trip – 	<ul style="list-style-type: none"> • Schedule of regular events 	<ul style="list-style-type: none"> • Affordable housing road trip

<ul style="list-style-type: none"> Affordable housing road trip WHQS open day to launch member information pack Briefing sessions on key housing issues / updates 	<p>performance across Caerphilly Homes.</p> <ul style="list-style-type: none"> To raise members' awareness of the range of services delivered by Caerphilly Homes. 	<p>Kelsey Watkins</p>	<p>July 2015</p> <ul style="list-style-type: none"> Member pack – September 2015 Briefing sessions - 2016 	<ul style="list-style-type: none"> Attendance at events Event evaluation / feedback 	<p>being funded by RSL partners</p> <ul style="list-style-type: none"> Anticipated costs for printing of member pack and launch event £500
<p>1.7 Maintain housing pages of website and review regularly with staff working group to ensure continuous improvement.</p>	<ul style="list-style-type: none"> To ensure stakeholders can obtain accurate, up to date information about Caerphilly Homes' services via the website. Use more effectively to share good news stories 	<p>Kelsey Watkins / Louise Saddler</p>	<p>Ongoing</p>	<ul style="list-style-type: none"> Surveys and user testing 	<p>N/A</p>
<p>1.8 Produce Caerphilly Homes directory</p>	<ul style="list-style-type: none"> To provide internal and external stakeholders with information on Caerphilly Homes, including range of services provided and key contact details. 	<p>Kelsey Watkins</p>	<p>April 2016</p>	<ul style="list-style-type: none"> Feedback from Armchair Reviewers and Employee Panel 	<ul style="list-style-type: none"> Initial print run for approx. 6,000 copies - £3,000; for dissemination via Area Housing Offices, Housing Advice Centre, Tenant Handbook, community groups. E-version to be made available on website,

					<p>emailed to members and partners, e.g. RSLs, CF.</p> <ul style="list-style-type: none"> • Copies available on request and promoted via tenant newsletter, with plans for dissemination to wider tenant body in financial year 2016/15
<p>1.9 Increased use of other mediums, such as film, including:</p> <ul style="list-style-type: none"> • Rowan Place film • Digital storytelling • 'What we do' video • Filming of awards 	<ul style="list-style-type: none"> • To ensure stakeholders are able to access information about Caerphilly Homes and its services through a range of different formats. 	Kelsey Watkins	Ongoing	<ul style="list-style-type: none"> • Number of completed film projects per year 	<ul style="list-style-type: none"> • Total anticipated costs for Rowan Place film (2 year project) - £4,000 • Digital storytelling project – minimal costs attached, e.g. refreshments • 'What we do' video – £2,000 • Awards filming - £350
<p>1.10 Develop annual Caerphilly Homes event planner.</p>	<ul style="list-style-type: none"> • To provide a range of opportunities for informal, 	Kelsey Watkins / Joanne	Ongoing	<ul style="list-style-type: none"> • Level of engagement at 	<ul style="list-style-type: none"> • Annual events budget set at

	face to face engagement with stakeholders	James		events <ul style="list-style-type: none"> • Outcomes from events, e.g. surveys completed, take up of 'hard to let' properties, etc 	£4,500 (to include provision of branded merchandise)
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Key Aim 2 - To promote Caerphilly Homes' reputation locally, regionally and nationally					
What?	Why?	Who?	When?	How will it be measured?	How much will it cost?
2.1 Maintain regular flow of press releases	<ul style="list-style-type: none"> To raise the profile of Caerphilly Homes, by sharing successes. 	Kelsey Watkins	Monthly / ongoing	<ul style="list-style-type: none"> Number of positive news items in media 	N/A
2.2 Continue annual Transforming Lives and Communities Awards	<ul style="list-style-type: none"> Awards ceremony / celebration event offers the opportunity to raise Caerphilly Homes' profile through publicity before and after event. The awards help develop a positive reputation for Caerphilly Homes' amongst stakeholders. 	Kelsey Watkins / Joanne James	Held annually in September	<ul style="list-style-type: none"> Number of award nominations received Event feedback 	<ul style="list-style-type: none"> Allocated awards budget £2,000 (to be enhanced with sponsorship from suppliers)
2.3 Launch Caerphilly Homes gardening competition	<ul style="list-style-type: none"> To encourage tenants and local communities to take a sense of pride in their surroundings and improve general appearance of estates. To help promote the Caerphilly Homes' reputation amongst stakeholders. 	Kelsey Watkins / Mandy Betts	Summer 2016	<ul style="list-style-type: none"> Number of entries received 	<ul style="list-style-type: none"> £1,000 (will also explore opportunities for sponsorship)
2.4 Involvement in national housing campaigns and initiatives, e.g. Housing	<ul style="list-style-type: none"> To raise the profile of Caerphilly Homes within housing sector locally, 	Kelsey Watkins	Ongoing	<ul style="list-style-type: none"> Number of initiatives supported 	N/A

Camp, Housing Day, Council Homes Chat, etc.	regionally and nationally.				
2.5 Digital storytelling project	<ul style="list-style-type: none"> To promote reputation of Caerphilly Homes and local communities, through challenging perceptions and addressing stigma of social housing. 	Kelsey Watkins / Gail Taylor	September 2015	<ul style="list-style-type: none"> Digital story premiered at Transforming Lives and Communities Awards 	<ul style="list-style-type: none"> Minimal costs, e.g. refreshments for community
2.6 Work with local schools, colleges and adult education, e.g. careers aspirations talks.	<ul style="list-style-type: none"> To raise aspirations and promote housing as a career. To help build relationships with partner organisations. 	Kelsey Watkins	December 2015	<ul style="list-style-type: none"> Number of successful events / initiatives 	N/A
2.8 Production of e-bulletin for circulation to elected members, partner organisations, etc.	<ul style="list-style-type: none"> To raise the profile of Caerphilly Homes. To help forge stronger relationships with partners and raise awareness of potential areas for joint working. 	Kelsey Watkins	Summer 2016	<ul style="list-style-type: none"> Quarterly e-bulletin 	<ul style="list-style-type: none"> Design costs approx. £250

Key Aim 3 - To develop a consistent brand image and positive identity for Caerphilly Homes					
What?	Why?	Who?	When?	How will it be measured?	How much will it cost?
3.1 Schedule of staff events, to include: <ul style="list-style-type: none"> • Monthly 'hot topic' sessions • Caerphilly Homes staff conference / event 	<ul style="list-style-type: none"> • To help facilitate better partnership working across teams at Caerphilly Homes • To develop staff's sense of ownership and identity with Caerphilly Homes brand and ensure consistency across the housing service 	Kelsey Watkins / Richard James	Commencing June 2015	<ul style="list-style-type: none"> • Event evaluation / feedback • Increased staff satisfaction 	<ul style="list-style-type: none"> • Proposed annual staff event budget £2,000
3.2 Develop Caerphilly Homes mascot through children's design competition	<ul style="list-style-type: none"> • To engage local communities in developing a mascot which links in to Caerphilly Homes brand and offers tenants a sense of ownership. 	Joanne James / Gail Taylor	Autumn 2015	<ul style="list-style-type: none"> • Number of entries received • Mascot costume produced for use at events 	<ul style="list-style-type: none"> • £1,000
3.3 Stationery audit	<ul style="list-style-type: none"> • To collate all service leaflets, standard letters, etc being used by Caerphilly Homes and review in conjunction with Armchair Reviewers to ensure they are in keeping with brand and meet plain English guidance. • Production of easy reads and other formats where 	Kelsey Watkins	July 2016	<ul style="list-style-type: none"> • All materials consistently branded and written in plain English 	<ul style="list-style-type: none"> • We are not able to estimate rebrand costs at this stage, as stationery audit will identify what materials need to be rebranding / revised

	necessary to ensure materials are accessible to all.				
3.4 Review content of intranet pages and ensure it is updated regularly	<ul style="list-style-type: none"> To ensure consistent message is being delivered to staff 	Kelsey Watkins / Joanne James	Reviewed by August 2016	<ul style="list-style-type: none"> Staff feedback / engagement 	N/A

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CAERPHILLY HOMES TASK GROUP – 2ND JULY 2015

SUBJECT: WHQS POSITION STATEMENT

REPORT BY: INTERIM CHIEF EXECUTIVE

1. PURPOSE OF REPORT

- 1.1 To provide an overview of the current position with the WHQS Programme and the challenges facing the Council to achieve the standard by 2020.

2. SUMMARY

- 2.1 Arising from the stock transfer ballot in 2012 when tenants voted to remain with the Council as their landlord a commitment was made to tenants and Welsh Ministers that the Council would bring all the housing stock to meet the WHQS by 2020. An investment strategy and implementation plan was agreed in the latter half of 2012 and a staffing structure came into being at the start of 2013. There was a transition period from 2012 transferring from contracts that were committed under the former planned maintenance to the new WHQS arrangements. The new programme commenced in 2013/14 primarily through the in house work force. During 2013 there were a series of procurements undertaken to appoint the supply partner, and internal and external works contractors. However a number of setbacks were experienced resulting in significant slippage. It has been necessary to implement a number of additional measures to increase capacity and spread the risks. In addition there have been changing circumstances including increased costs above the Savills budget estimates, unanticipated stock condition deterioration, and the HRAS buy out resulting in a borrowing cap all of which are causing constraints and challenges. The report outlines the current position and measures being taken to ensure the objective of meeting WHQS by 2020 can still be achieved.

3. LINKS TO STRATEGY

- 3.1 The Welsh Housing Quality Standard is intended to ensure that all local authority and housing association homes are improved and maintained to achieve specified standards.
- 3.2 The Single Integrated Plan 2013-2017 has a priority to "improve standards of housing and communities, giving appropriate access to services across the County Borough".
- 3.3 The Council's Local Housing Strategy "People, Property, and Places" has the following aims:
"To provide good quality, well managed houses in communities where people want to live, and offer people housing choices which meet their needs and aspirations."

4. THE REPORT

- 4.1 The Council owns around 10,900 properties and in addition there are 417 leasehold flats. Following the outcome of the stock transfer ballot in February 2012 the Council worked with

the tenants on the Repairs and Improvement Group to develop an investment strategy and implementation plan to deliver WHQS by 2019/20. This was approved by the CHTG / Cabinet Sub Committee in September 2012. The plan is based on two separate programmes for internal and external works operating on a community basis with concurrent contracts in the three housing areas (Lower Rhymney Valley, Upper Rhymney Valley, and Eastern Valley). The works are split 50:50 between the in house work force and contractors. There will be a separate environmental programme. The in house work force is primarily focused on internal works and at Rowan Place and there are teams working in all three housing areas.

4.2 The contractors for internal works are:

Contract Services	Lower Rhymney Valley
Vinci	Upper Rhymney Valley
Keepmoat	Eastern Valley

4.3 In respect of external works small lots packages are being utilised in the Eastern Valleys providing opportunities for smaller Caerphilly based businesses. Seven contracts were awarded as part of the 2014/15 programme with a further two having to be retendered. A framework for external works has been put in place for the Upper Rhymney Valley and packages of work will be tendered from this framework during the 15/16 financial year. The framework has 2 lots for work above, and below, £750,000. A more recent decision has been to reallocate the external works in the Lower Rhymney Valley as the in house work force has insufficient capacity to continue with this work due to the redeployment of resources to Rowan Place. New contract arrangements will have to be procured and the options are under review.

4.4 The WHQS business plan is based on the Savills stock condition survey undertaken in 2008. The conclusion from the survey was the stock had been well maintained on a day to day basis but required substantial investment to meet the requirements of the WHQS. A significant number of components were identified as having reached or were reaching the end of their useful life and required replacement in the short term. The main areas of failure against the standard related to the lack of internal modernisation to the properties and issues surrounding the environment around the properties.

4.5 With the lapse of time since the Savills survey and given that the survey was only a 15% sample all properties are receiving an individual survey to determine the scope of works necessary to meet the standard and /or verify whether previous works were fully compliant. There will be two separate surveys to scope the internal and external works. In addition a specialist surveyor will carry out an asbestos survey. Properties may also be visited by technical officers in relation to electrical and heating works.

What has been achieved to date

4.6 The first full financial year of the programme was 2013/14 and primarily consisted of internal works being carried out by the in house work force. The programme originally contained 642 properties but due to the amount of previously achieved works compliant with WHQS additional properties were brought forward increasing the total programmed number to 845. By the end of the 2013/14 financial year the in house work force had completed work to around 600 properties and properties that were recorded as internally compliant were 660. Compliance indicates that a property meets the WHQS internally because:

- Works have been carried out to renew one or more elements
- One or more elements were already compliant
- The tenant refused the renewal of one or more elements (acceptable fail)
- A combination of the above

4.7 During this particular year there was a high level of pre existing compliance for heating and electrics.

- 4.8 Overall customer satisfaction levels were very high at 92% well above the target of 80%. In respect of service standards set out in the "Charter for Trust" the average standard met was 85% which fell short of the target level of 90%.
- 4.9 Following an EU procurement a supply partner was appointed during 2013 to manage the supply chain in respect of all material required by the in house work force and key components by contractors. This contract commenced in September 2013 and required a period of adjustment to new working practices. While there have been some issues the contract is now operating well but is dependent on good forward planning and communication of timely information on material requirements.
- 4.10 During 2013 there were a number of major procurements for the internal and external works contracts which had been planned to commence in April 2014. It had been anticipated there would be a step change in the volume of work during 2014/15 with either internal or external works planned for 3,713 properties. Unfortunately significant slippage has arisen which has been documented in other reports. In summary there have been delays in the commencement of the internal works contracts (one contractor commenced in November 2014, and the other two contractors in January 2015); the external works contracts in the Upper Rhymney Valley have been retendered (the first works package now expected to commence in May 2015); the small lots programme was curtailed from 800 to 240 properties and the 9 contracts associated will all run on into 2015/16. In addition the in house work force was unable to deliver the full external works programme in the Lower Rhymney Valley due to the redeployment of resources to Rowan Place.
- 4.11 Although a revised programme for 2014/15 was subsequently agreed to reflect the various setbacks of 1683 properties the out turn is lower again at around 700 (42% of the revised programme. Notwithstanding the lower number of completions overall satisfaction is 90%, and service standards met is 93%, both above target.

What remains to be done

- 4.12 Due to the extent of the slippage there are very big challenges to complete the programme by 2020 due to the sheer volume of work that has to be undertaken over the remaining 5 years. From April 2015 the average rate of completions over the 5 years needs to achieve 80 completions a week (external and internal works). A revised investment strategy and capital programme for 2015/16 were approved by Cabinet in February 2015. The latter at £36m will be the biggest ever annual housing capital programme since Caerphilly was formed in 1996. Some 4,500 properties have been planned for either internal or external works but in addition the further slippage on the 2014/15 programme of another 1000 properties will also have to be absorbed. The major part of this further slippage relates to external works (small lots in the Eastern Valley and the Lower Rhymney Valley). This will require a target of in excess of 100 property completions a week. It may be inevitable that the programme will have to be profiled again but this will increase the number of properties within the last year fully utilising the remaining time contingency within the programme. But prior to undertaking such an exercise it will be prudent to see the rate of progress over the next few months. This may dictate the need to consider further measures beyond those outlined below.

Impact of slippage

- 4.13 The slippage has resulted in a larger volume of work to be completed over a shorter timescale. The targets are challenging but not unachievable. The pre requisites are effective planning and organisation, timely and accurate information and appropriate resourcing. Recognising the need to accelerate the programme and the pressure this places on the WHQS a number of actions have been taken.
- 4.14 The senior management has been strengthened to help drive performance and operational efficiency. The project teams have been reorganised around the contract arrangements to ensure a more consistent approach across the County Borough and to make the accountabilities of the managers clearer. Additional staff have been recruited to increase the

complement of surveyors, clerk of works, quantity surveyors, and TLOs. It has been difficult to recruit directly to some of the roles and reliance has had to be placed on use of agency which has involved paying higher rates. But even with these additional posts the capacity to manage the volume of work against the timescale pressure remains a major risk. Therefore sub programmes have been created and allocated to others to manage including:

- The external works to 200 blocks of flats (circa £5m) in the Lower Rhymney Valley will be managed by the Private Sector Housing Team
- The sheltered housing schemes (27 with a budget of circa £10m) will be outsourced to a suitable multi disciplinary consultancy
- Part of the HRA garage programme (budget £600,000) has been allocated to Building Consultancy

4.15 These sub programmes increase capacity, spread the risks, and will improve the confidence of delivery by 2020. However the WHQS team still need to exercise effective client control including monitoring expenditure which is a management time demand.

Capacity to deliver the programme

4.16 The majority of the contract arrangements are now in place and the momentum is starting to build. The main exception to this is in the Lower Rhymney Valley where new external works contracts are required following the decision to reallocate the work that was originally awarded to the in house work force. However in the short term to ensure continuity it will be possible to utilise the small lots contract structure.

4.17 There are 2231 properties in the programme for internal works in 2015/16. These require a completion rate of 45 a week. The breakdown across the contracts is:

	Planned	Completions per week
In house (all areas)	757	15
Keepmoat (EV)	815	16
Contract Services	426	9
Vinci	233	5
Total		45

4.18 Based on experience over the last two years typically the number of properties involving internal work has been 15 to 20% lower due to a combination of factors including previously achieved compliance and tenant refusals. Early indications are that the three contractors will meet the targets outlined. The in house team were achieving an average of 10/12 a week during 2013/14 but performance appears to have fallen during 2014/15. This is subject to on going investigation but is partly accounted for by the redeployment of resources to Rowan Place in Rhymney and recruitment and retention of skilled operatives. The turn around time for a property having all 4 internal components renewed should not exceed 20 working days and should be less where the work is more limited. Rowan Place is an exception as the 72 properties are undergoing a full refurbishment internally and externally.

4.19 To achieve the targets requires that all contractors have continuity of work. This places pressure on the front end surveying and scheduling of work. To help speed up the surveying a pilot has been introduced whereby the kitchen designs are outsourced to Rixonway, the kitchen unit manufacturer. Whereas one surveyor was previously achieving on average 2 internal surveys a day, it is now possible to achieve 5 or 6 surveys a day, although time still has be allowed for inputting the survey information back in the office. The full impact of the pilot has to be assessed in terms of process modifications but clearly speeding up the number of surveys completed per week is critical to maintaining the programme. It has therefore already been decided to make the Rixonway kitchen design service a permanent arrangement for the remainder of the programme. As an absolute minimum to keep pace with the 2015/16 programme 45 internal surveys a week have to be completed. Ideally the number of internal surveys needs to be higher (60 a week) to get ahead of the programme and improve forward planning.

- 4.20 A further consequence of the internal works targets is the large increase in the number of properties open at any one time. There could be up to 150 properties where internal works are in progress. This will stretch the clerk of works and TLO resources. The clerk of works are critical to the day to day contract management and the TLOs have to address a wide variety of tenant issues that crop up daily, often involving extra support where vulnerable tenants are involved.
- 4.21 The external works on average will also require 45 completions per week. However because the external works are organised differently completions will relate to contracts rather than individual properties. During the course of 2015/16 there are likely to be up to 30 contracts running. This will impose further pressures on contract management both in terms of preparing contracts for tender and in the on site management. There are also some concerns about the capacity of the market locally to meet the Council's requirement. The Procurement team are undertaking a supplier engagement plan to increase the number of contractors interested in tendering for work.
- 4.22 Another EU procurement will be necessary for external works in the LRV. Consideration is being given to make this a more flexible arrangement across both internal and external works with the ability to be used across the County Borough as a contingency if there are areas or contracts where further programme slippage becomes a problem.

IT Systems

- 4.23 With separate programmes for internal and external works there will be in excess of 20,000 individual property projects. The IT systems are fundamental to manage the information flows from the initial survey stage, works scheduling, through the works stage, to the completion and valuation process. The management and monitoring of the WHQS Programme is via the Keystone asset management system. The system records information relating to the age of individual components along with the estimated costs associated with replacing those components. A large amount of development work has been undertaken over the last 2 years to establish a series of financial, contract and customer satisfaction dashboards. The internal works volume metric dashboard provides real time information on the progress of all internal works contracts. The internal works financial metrics dashboard provides information on the costs incurred based on a schedule of rates. Dashboards have also been created that report on satisfaction and the issues raised in relation to the customer satisfaction surveys. All dashboards allow staff to drill down to see individual property detail from a high level summary view. Dashboards for external work remain under development.
- 4.24 The Keystone Asset Management system is one of the leading applications in the housing IT sector and was highly ranked in a recent industry survey. It is one of the few systems that provides a contract management module (the KPM) which has been successfully utilised to manage the WHQS internal works. CCBC has been recognised for use of the KPM and has become a reference site for other social landlords.
- 4.25 In parallel with the development of Keystone there has been a move to facilitate mobile working with new technology. This has taken much longer than anticipated but is critical to efficient working. With the increase in staff numbers mobile working is now an imperative as there is insufficient desk space in Cherry Tree House to accommodate all the staff. The deployment of tablet technology for TLOs and foremen has had some technical problems largely associated with mobile connectivity. The IT Service is working with the WHQS team to overcome the problems and there is a regular report on progress to the WHQS Project Board. However there are some limitations to mobile working due to network coverage within the County Borough. There are now 5 surveyors successfully completing internal condition surveys using tablets. This has saved the surveyors at least 10 minutes of data entry per survey resulting in improved efficiency. There are 3 surveyors undertaking external works surveys using the tablets and the surveys will link to the generation of electronic bill of quantities. Once this becomes embedded there will be significant time efficiencies, as well as a more structured and consistent approach to scheduling external works. Tablets have also

been successfully deployed for the Clerk of Works enabling the issue of electronic site instructions and thereby saving time on data entry and manual preparation of documentation.

- 4.26 Not all staff are keen to embrace technology and too much reliance is still based on paper based systems and individual spread sheets often causing duplication of work and scope for data errors. It has been demonstrated that the technology can deliver efficiencies and ensure consistency and all staff need to fully embrace the new ways of working.
- 4.27 The IT Service has successfully created a number of bespoke reports using Keystone together with Microsoft SQL Server Reporting Services. For examples the three contractors for internal works have different discount rates against the NSR for individual elements and a combined rate where all the internal components are being renewed (kitchen, bathroom, rewire and heating). Across the three internal works contracts there are 12 different discount rates. It has been possible to automate the calculation of these discounts which has saved a significant amount of time as these rates had previously been calculated manually.
- 4.28 The Welsh Government has introduced a requirement for a WHQS Compliance Policy which has to be in place by 1st April 2016. The IT systems will be a particularly important aspect of the policy covering data collection, data storage, progress reporting and independent verification.

5. EQUALITIES IMPLICATIONS

- 5.1 An EqIA has not been undertaken as the report is for information.
- 5.2 However Part 7 of the WHQS requires the accommodation provided within the dwelling should as far as possible suit the needs of the household. All necessary aids and adaptations to meet the specific requirements of any residents, including those with disabilities, should be provided.

6. FINANCIAL IMPLICATIONS

- 6.1 The retention business plan to achieve the WHQS by 2019/20 was approved by the Council in October 2011. The business plan was based on the Savills cost estimates of £210m with the funding agreed as:

£22m	General Fund capital resources
£39.3m	Prudential Borrowing by HRA
£1.5m	HRA reserves
£58.4m	MRA (£7.3m per annum from WG)
£88.8m	HRA revenue contribution to capital (equates to an average of £11.1 per annum).

- 6.2 The business plan has been revised on a number of occasions to support the annual MRA application. There is no longer any contribution from the General Fund. The whole programme will be funded by the HRA. The latest version of the business plan has taken into account the subsidy buy out. Due to the slippage that has arisen, it has not been necessary to draw down any borrowing for WHQS to date. A borrowing provision of £55m has been agreed for WHQS but the current version of the business plan shows a need for £43.7m. However actual expenditure is showing significant variances from the Savills estimates, particularly for external works. Significant additional costs are already being incurred in Rowan Place, Rhymney. The first round of small lots contracts in Argoed, Oakdale, Markham and Hollybush have increased from an original estimate of £1.5m to £2.5m, and the tender for the first external works package in the Upper Rhymney Valley was 60% above the Savills cost plan. If an increase in capital expenditure of 10% is assumed over 5 years this will increase the borrowing requirement by some £21m. Following the HRAS buy out there is now a borrowing cap on the HRA which could impact on the delivery of the WHQS Programme. During the

course of 2015/16 it is the intention to revise the cost plan in light of emerging information from external works contract tender information and valuations on the internal works contracts. There are some concerns about escalation of costs as surveys suggest there are similar problems on other estates to those discovered at Rowan Place.

- 6.3 The budget for the 2014/15 financial year was £29m but due to the major slippage that has occurred there is an underspend of £13.5m which will be carried forward to fund the programme.

The Capital Programme budget for 2015/16 is £36m. The renewals element is £30m based on a planned programme of work to 4,500 properties.

There are 80 professional, technical and administrative staff in posts employed directly on the WHQS programme and around 145 trade operatives forming the in house work force. At the time of writing there were 9 vacancies within the professional, technical and administrative group.

In 2014/15 £1.4m of staff costs were charged to the Capital budget against the fees built in to the business plan. All other staff costs including recharges from the Procurement, Systems and Performance, and Housing Finance teams are met by the HRA.

7. PERSONNEL IMPLICATIONS

- 7.1 The successful delivery of the WHQS Programme is entirely dependent on having the necessary staff resources properly aligned with the strategy. An organisation structure based on an area team approach was agreed in October 2012. The original structure brought together the planned maintenance team, the heating team, statutory maintenance, quantity surveying, together with the DLO manager and foremen on the contracts side of the DLO and around 100 trade personnel from the Building Maintenance DLO. The area based project managers had contract responsibilities within their respective areas and in addition cross cutting responsibilities. This was a blend of operational and strategic functions. In the light of operational experience it became clear there was lack of clarity over management accountabilities, inconsistencies of approach across the three area teams and insufficient flexibility over the use of staff resources.
- 7.2 In order to improve the effectiveness of the organisation structure a number of changes were introduced in December 2014.
- The matrix management was terminated and replaced with hierarchical responsibilities for the project managers
 - A separation of strategic and operational management functions
 - The establishment of a new senior position of Deputy Head of Programmes
 - The area team structure was replaced by three projects teams operating County Borough wide: the in house team; the team managing the contracted internal works; and the team managing the external works (also incorporating the servicing and statutory maintenance)
 - The establishment of additional posts in critical areas (surveyors, clerk of works, quantity surveyors, TLOs, environment officers).
- 7.3 The current staff structure is attached in Appendix 1. At the time of preparation of the report there were 9 vacancies.
- 7.4 The timescale is a particular pressure which has been compounded by the slippage. This has created a demand for additional posts including surveyors, clerk of works, quantity surveyors and TLOs. There has been a mixed response to recruitment and additional reliance is being placed on agency and consultancy support. A further review has indicated that to cope with the peak demand ideally additional staff resources beyond that shown in the structure in the Appendix will be needed in critical areas such as clerk of works and TLOs.

- 7.5 The office base is Cherry Tree House, Oakdale. The number of staff now exceeds the available desk space and it has been necessary to move to hot desking and mobile working supported by investment in new technology. Wider use of community locations is being explored to make most efficient use of staff time.
- 7.6 The in house workforce has grown from an initial 100 operatives to around 160 at the peak. However there is a constant turnover of agency personnel and numbers fluctuate between 140 and 160. Around 60 staff have been deployed to Rowan Place. There are 4 other teams working on the internal works programme. Performance has dipped during 2014/15 with completion running at an average of 8 per week. The 4 teams should be achieving an average of 12 per week. The allocated internal works programme for 2015/16 requires a completion rate of 15 per week. This may necessitate recruiting another team or contracting out some work. However there have been recruitment and retention issues for experienced and skilled operatives and this does not augur well for establishing another team. A longstanding arrangement has been the use of stand in foremen to ensure there is appropriate supervision. However these roles need to be properly consolidated as Assistant Foremen.
- 7.7 The affordability of additional staff resources is a factor that has to be taken into account given that the WHQS Programme has to be fully funded by the HRA, which is now subject to a borrowing cap. With other pressure on the HRA and the revenue contribution required to fund the capital programme the scope to recruit additional staff resource is limited and as such priority must be focussed on the most critical areas where capacity is a threat to programme delivery.

8. CONSULTATIONS

- 8.1 Comments received have been incorporated within the report.

9. CONCLUSIONS

- 9.1 The WHQS Programme is complex involving:
- A multiplicity of internal and external works contracts with differing procurement implications
 - Environmental projects, yet to be determined
 - The scale of the investment
 - The timescale
 - The packaging of works to meet tenant requirements and carrying out work in occupied homes
 - Concurrent contracts within the three housing areas
 - Transfer of sub programmes of work to third parties, but retaining client control
 - Maintaining the momentum of surveying, tenant liaison, and contract management
 - Quality service standards and customer focus
 - Deployment of skills and expertise at both strategic and operation levels
- 9.2 There is a need for constant adjustments to respond to both daily challenges and the wider strategic objectives. Although fundamentally WHQS is a property improvement programme there are numerous people issues in carrying out work in occupied homes. The added value is to meet the ambition of transforming lives and communities.
- 9.3 At the last cost plan review £29m of additional costs had been identified off set by £26m of savings. The next review due later in 2015 will examine the trend in valuations for the internal works undertaken by the three internal works contractors: together with tendered prices for small lots in the Eastern Valley and contract packages in the Upper Rhymney Valley all related to external works. There are indications of a significant increase in costs. In respect of delivery resources the fee element within the business plan has some limited headroom to fund additional resources but any further costs to the HRA would reduce the contribution to

fund the Capital works. Fees will also be payable to third parties commissioned to manage sub programmes of work but these will be subsumed as part of the contract costs. A balance is required between the need for extra resources to cope with the volume of work and the affordability within the HRA.

- 9.4 Officers periodically meet with Welsh Government officials to report on progress. Some of the challenges facing the Council are no different to those which faced the RSLs and other retention stock local authorities in completing their WHQS investment programmes. The WG officials have suggested it would be beneficial to learn from the experience of these other landlords. The Project Board will therefore make arrangements to meet with neighbouring social housing landlords and ascertain whether there are further measures that could be implemented in addition to those outlined in this report. The WG officials want the assurance that the Council has an action plan backed by a viable business plan to meet the 2020 deadline for WHQS.
- 9.5 It is not possible to give an absolute guarantee about the deliverability of the programme by 2020. But various actions have or are being undertaken to give the best opportunity of achieving this objective and further steps will be taken to follow up the suggestions from Welsh Government. If all parts of the process perform and deliver as planned then it should be possible to meet the 2020 deadline. But with the complexity of the programme, and the large number of players involved not every eventuality can be foreseen. The Project Board will continue to closely monitor progress on a fortnightly basis and proactively manage any necessary changes to keep the programme on track.

10. RECOMMENDATIONS

- 10.1 The report is for information.

11. REASONS FOR THE RECOMMENDATIONS

- 11.1 To meet a request for a position statement on the WHQS Programme.

12. STATUTORY POWER

- 12.1 Local Government and Housing Acts.

Author: P G Davy, Head of Programmes

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Consultees:	Cllr D V Poole	-	Deputy Leader and Executive Member for Housing
	C Burns	-	Interim Chief Executive
	N Scammell	-	Acting Director of Corporate Services and S151 Officer
	S Couzens	-	Chief Housing Officer
	M Lloyd	-	Deputy Head of Programmes
	J Roberts Waite	-	Strategic Co-ordination Manager
	E Lucas	-	Head of Procurement
	P Lewis	-	IT Development Manager
	R Lewis	-	Systems and Performance Manager
	A Edmunds	-	WHQS Implementation Manager
	S Greedy	-	WHQS Implementation Manager
	C Roden	-	WHQS Implementation Manager
	G Hardacre	-	Head of People Management and Development
	R James	-	Principal HR Officer
	L Allen	-	Principal Accountant

Appendices:

Appendix: Staff Structure at May 2015

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WHQS SERVICE AREA

**Head of Programmes
Phil Davy**

Secretary
Elizabeth Cooper

Programme Delivery

**Deputy Head of Programmes
Marcus Lloyd**

Support

**In house
Internal & External Works**

**Contracts
Internal & External Works**

**Principal Human
Resources Officer
Richard James**

**Lives and
Communities**

**Systems &
Performance Team**

**Housing
Finance Group**

Page 35

**Relationship
Manager
Kath Webb**

**Project Manager
Alan Edmunds**

**Project Manager
(Internal)
Steve Greedy**

**Project Manager
(External)
Colin Roden**

**Strategic Coordination
Manager
Jane Roberts Waite**

**Systems &
Performance Manager
Rhys Lewis**

**Principal
Accountant
Lesley Allen**

**Senior Admin
Officer
Lisa Vokes**

**Works Supervisor
Jason Owen**

**Asst Project
Manager
Jeremy King**

**QS
Keston Lewis**

**Asbestos
Surveyors (2)
Paula Griffin
Matthew Hayman**

**Asst Project
Manager
(Internal)
John Moorman**

**QS
Gareth Harris
Stephen Venables(A)
Estimator
Neil Russell**

**Asst Project
Manager
(External)
Steve Martin**

**QS
Lee Filer
Kane Donovan (A)
Estimator
Colin Price**

**Asst Project Manager
Energy, Servicing
& Stat Maintenance
Phil Jones**

**TLO
Lyndsey
Mote**

**Surveyor
Graig
Davies**

**TLO
(OT)
Natalie
Hughes**

**TLO
(12)
Nikki Davies
Victoria Weed
Richard Thurston
Julie Arthur
Debra Holley
Sherell McLoughlan
Leah Davies
Owain Morgan
Lynne John
Nathan Thomas
Matthew Llewellyn
James Hurley**

**Tech Asst
1 x VACANCY**

**Environmental
Officers (New)
3 x VACANCY**

**Admin
Officer
June
Hopkins**

**Admin Asst (6)
Claire Thomas
Shelly Hogan
Clare Ridd
Joanne James
Graham Morris
Stefan Jones**

**Apprentice
Elliott Keep**

**Foreman (6)
1 x VACANCY**

**Stand In
Foreman(8)**

**Operatives
(circa 140)**

**Surveyors (2)
Andrew Bevan
Brian Evans(A)**

**Tech
Officer
Peter Jones
1 x VACANCY**

**Estimator
Jonathan
Hampshire**

**Surveyors (3)
Karl James
Geoff Griffiths
Wayne James**

**CoWs (5)
Kelvin Bartlett
Glen Davies
Adrian Price
John Morgan
David Campbell
1 x VACANCY**

**Surveyors (4)
Alan Sterry
Chris Jones (A)
Phil Williams
Craig Hammond (A)**

**CoWs (3)
Jeremy Mills
Phil Cleaver
Gareth Watkins**

**Energy Off/
Stat Maint
(New)
1x VACANCY**

**Senior
Inspector
Nick Richard**

**WHQS
CoW
Matthew
Phillips**

**Inspectors(4)
CoW (1)
James Crandon
Lee Bennett
Gary Parr
Karen Price
Mark Mellens**

**TLO
(OT)
(New)
1 x VACANCY**

**Comm
Kelsey Watkins**

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CAERPHILLY HOMES TASK GROUP – 2ND JULY 2015

SUBJECT: WHQS PERFORMANCE MONITORING 2014-2015 (FULL YEAR)

REPORT BY: INTERIM CHIEF EXECUTIVE

1. PURPOSE OF REPORT

1.1 Details of the capital expenditure programme for 2014-15 for WHQS works are also included.

2. SUMMARY

- 2.1 The report describes the arrangements that have been put in place to monitor and manage the performance of the WHQS programme for 2014-15. This includes a number of performance 'dashboards' used by a range of staff within the WHQS team. Performance is monitored and managed formally via the WHQS Management Delivery Team meetings, which occur every month.
- 2.2 The WHQS internal works programme for 2014-15 included 889 properties. Within this programme 52 properties were surveyed and found to require no works. Of the remaining 837 properties, work on 556 was undertaken by the in-house workforce, supported by specialist sub-contractors. The remaining 281 properties were planned to be undertaken entirely by the three main outside contractors; Keepmoat (Eastern Valleys); Contract Services (Lower Rhymney Valley); and Vinci (Upper Rhymney Valley). As of 5th June 2015, 439 properties within the in-house contractor programme were compliant in respect of their internal elements (73%). Details of compliance levels for each of the 31 contracts in the internal works programme 2014-15 are included in the report.
- 2.3 Arrangements have now been put in place to measure tenant satisfaction levels and compliance with service standards for the internal works contracts via surveys. A new survey methodology was introduced in 2014-15. The 104 surveys returned in relation to the in house provider reveal that the overall satisfaction level for internal works is 90%. They also reveal that 93% of the standards that we measure within the Charter For Trust document were achieved. An external works survey has been designed and will be implemented in 2015-16.
- 2.4 The WHQS external works programme for 2014-15 included 835 properties. Work on 504 of these properties was planned to be completed by the in-house workforce in the Lower Rhymney Valley, supported by sub-contractors. They were also carrying out external works on 76 properties at Rowan Place in the Upper Rhymney Valley. The majority of the remaining 255 properties were to be completed by outside contractors via small lots contracts in the Eastern Valley, with one small contract on 16 non-traditional construction properties also taking place in Upper Rhymney Valley. Work continues to produce a performance dashboard for external works. Details of works completed on the external works programme 2014-15 have not been entered into the Keystone system, which means that performance information is currently not available.

3. LINKS TO STRATEGY

- 3.1 **National Housing Strategy:** The Welsh Assembly Government's National Housing Strategy 'Better Homes for People in Wales' (2001) has key themes of quality and choice. The WAG vision for housing "*wants everyone in Wales to have the opportunity to live in good quality, affordable housing*".
- 3.2 **The Single Integrated Plan 2013-2017** has a priority to "improve standards of housing and communities, giving appropriate access to services across the County Borough".
- 3.3 **Local Housing Strategy:** Property Theme: "*Providing the opportunity for everyone to live in affordable, sustainable, good quality housing, regardless of tenure.*"
And links specifically to Strategic Aim 6: Housing Management, "*To provide good quality, well-managed homes in communities where people want to live, and offer people housing choices which meet their needs and aspirations.*"

4. THE REPORT

4.1 Performance monitoring and management arrangements

- 4.2 The performance of the WHQS Team is monitored using reports based on data within the Keystone asset management system. This system records information relating to the age of individual components within council homes, along with the estimated costs associated with replacing those components. The system is also used to monitor the contracts within the WHQS programme, and the actual costs associated with those contracts.
- 4.3 Performance is monitored continually via a number of bespoke dashboards that have been created by the Housing Systems and Performance team. The Internal Works Volume Metrics dashboard provides 'real time' information on the progress of all internal works contracts.. The Internal Works Financial Metrics dashboard provides up-to-date information on the costs incurred by all internal works contracts based on a Schedule of Rates used by Savills, as part of the stock condition survey carried out in 2008, together with an 'in-house' Schedule of Rates.
- 4.4 All the dashboards allow staff to drill down to see individual property detail from a high level summary view. Further dashboards will be developed for the external works programme which commenced in April 2014. This work has been delayed because of problems with the implementation of an external works Schedules of Rates and also with the adoption of mobile working. Six external works contracts from the 2015-16 WHQS programme are now operational within the Keystone system which will facilitate performance monitoring and management in the coming year.
- 4.5 Performance is reported formally to the monthly WHQS Management Delivery Team Meetings. Under-performance is challenged during these meetings and performance information is also used to develop forward planning strategy.
- 4.6 **Progress of the internal works programme 2014-15**
- 4.7 Surveying of 889 properties in the internal works programme for 2014-15 is complete. However there remain 14 kitchens; 11 bathrooms; 6 heating systems; and 4 electrical systems that are un-surveyed in a total of 28 properties. 26 of these properties are within the in-house contractor programme; and 2 within the outside contractor programme.
- 4.8 It can be seen from the two tables below that the original internal works programme for 2014-15 has reduced in size, partly due to works being completed early (167), but mainly because of contracts deferred to 2015-16 (565).

4.9 Table 1: Shows the in-house workforce contracts which were planned for 2014-15, but which were brought forward into 2013-14 and completed ahead of schedule:

Brought forward into 2013/14 Contracts - Contract names	No. Properties
INT13D-E08 CARLYON RD\ROSE CT\CEFN CT-LOWER PANTSIDE	24
INT13D-E09 GLANSHON\LINDEN\WILLOW COURTS-UPPER PANTSIDE	35
INT13D-L08 FIRST AVENUE-TRECENYDD	41
INT13D-U09 TY COCH (1-40)-RHYMNEY NORTH	37
INT13D-U10 TY COCH (41-116)-RHYMNEY NORTH	30
Total:	167

4.10 Table 2: Shows the contracts planned for 2014-15, but which have been deferred to the 2015-16 programme:

Deferred to 2015/16 - Contract names	No. Properties
INT15C-EC04 DYLAN AVENUE/PWLLGLAS ROAD	35
INT15C-EC05 ST MARGARETS AVE/FAIRVIEW	33
INT15C-EC06 CEFN FFOREST AVE/TYNYCOED CRES	23
INT15C-EC07 DAVIES ST/BRYNGOLEU ST/BRYN RD	19
INT15C-EC08 GREENWOOD RD/WHEATLEY PL	24
INT15C-EC09 ADDISON ST/BEVAN CRES	21
INT15C-EC10 WAUNBORFA/TWYNYFFALD/OLD POLICE STATION	27
INT15C-EC11 BEDWELLY ROAD	28
INT15C-EC12 PENCOED AVE - PART 1	25
INT15C-EC13 PENCOED AVE - PART 2	26
INT15C-EC14 PENCOED AVE - PART 3	15
INT15C-EC15 PENYBRYN AVE/MARIANWEN ST	25
INT15D-E16 ELM DRIVE - EVENS PART 1	29
INT15D-E17 ELM DRIVE - EVENS PART 2	31
INT15D-E18 ELM DRIVE - ODDS	19
INT15C-LC04 ALEXANDER COURT	64
INT15C-LC05 BUXTON COURT	57
INT15C-LC06 GRAHAM COURT	64
Total:	565

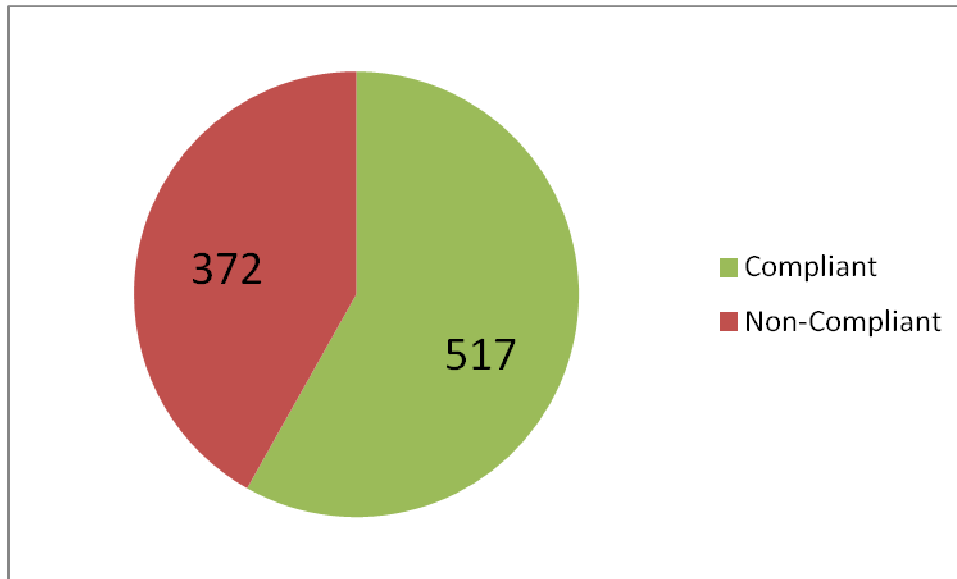
4.11 Internal works undertaken by outside contractors commenced late in 2014. Problems were experienced with the valuations process which has meant that information relating to completions of internal works undertaken by some outside contractors has not been entered into the Keystone system by WHQS Team staff. This means that the performance information within this report is not up-to-date and does not fully represent the amount of work completed by the outside contractors.

4.12 Work is being undertaken to ensure that target work start and target work end dates, together with actual start and end dates are entered into the Keystone system for the internal works programme for 2015-16. Start and end dates will also be entered for each of the four elements within each home (Kitchen, Bathroom, Heating and Electrics). This should improve the availability of performance management information during 2015-16.

4.13 Pie chart 1 (below) shows that at the time of writing 517 properties in the 2014-15 programme were compliant in relation to their internal elements. Upon surveying, 52 of these properties were found to be already compliant or were classed as acceptable fails – no works were therefore required in these homes. ‘Compliance’ indicates that a property meets the WHQS internally because:

- We have carried out works to renew one or more elements to achieve compliance.
- One or more elements within a property were already compliant.
- The tenant refused the renewal of one or more elements (this is classed as an acceptable fail – resident choice).
- Or any combination of the above reasons.

4.14 Pie chart 1: Internal works compliance (2014-15)



4.15 Contract work is delivered and managed in three geographical areas; Eastern Valleys; Lower Rhymney Valley; and Upper Rhymney Valley. Table 3 (below) reports on compliance levels within each of the 31 contracts within the 2014-15 WHQS programme. It reveals that overall 58% of the properties in the programme are now compliant. Where contracts have a low level of compliance, typically it indicates that works have not yet commenced, or have not yet been completed, or have been completed but not yet entered into the Keystone system by WHQS Team staff.

4.16 Table 3: Internal works compliance per contract (2014-15 programme)

Contractor	Area	Contract	Compliant	Non-Comp.	Grand Total	% Compliant
Keepmoat	Eastern Valleys	EC01 PERTH COURT/ADELAIDE COURT	0	25	25	0%
		EC02 MELBOURNE COURT/SYDNEY COURT	0	27	27	0%
		EC03 BRISBANE COURT/CWRT Y WAUN	0	27	27	0%
Contract Services	Lower Rhymney Valley	LC01 HALDANE COURT	22		22	100%
		LC02 ATTLEE COURT	42	12	54	78%
		LC03 GREENWOOD COURT	8	12	20	40%
Vinci	Upper Rhymney Valley	UC01 MOUNTBATTEN/RAMSDEN/JENKINS/HAVARDS ROW	2	41	43	5%
		UC02 BEULAH/DUFFRYN/FORGE/THOMAS FIELDS	4	31	35	11%
		UC03 BROOKFIELD AVE/EGLWYS FAN/BRYNHYFRYD	0	37	37	0%
Outside Contractor Sub Total (Includes 9 homes that were already compliant)			78	212	290	27%
In-House	Eastern Valleys	E10 ELM/LIME/OAK/PENYCAEAU COURT	31	2	33	94%
In-House		E11 HIGH MEADOW - PART 1	23	3	26	88%
In-House		E12 HIGH MEADOW - PART 2	14	2	16	88%
In-House		E13 CENTRAL AVENUE - PART 1	7	6	13	54%
In-House		E14 CENTRAL AVENUE - PART 2	15	2	17	88%
In-House		E15 CLYTHA/PENRHIW/TWYN PLACE	14	10	24	58%
In-House	Lower Rhymney Valley	L09 WEST AVENUE/TY ISAF BUNGALOWS	15	1	16	94%
In-House		L10 SECOND AVENUE	26	4	30	87%
In-House		L11 THIRD AVENUE/TEGFAN	30	5	35	86%
In-House		L12 GRANGE CLOSE	26	7	33	79%
In-House		L13 THE CRESCENT TRECENYDD	29	1	30	97%
In-House		L14 HEOL FACH/PEN Y FFORDD/EAST AVE	19	3	22	86%
In-House	Upper Rhymney Valley	L15 BRYNCENYDD	14	19	33	42%
In-House		U11 BRYN CARNO	32	6	38	84%
In-House		U12 GOLWG Y MYNYDD/HIGH ST/TWYN CARNO	16	5	21	76%
In-House		U13 BRYNMYNACH AVE/COED YR HAF	19	4	23	83%
In-House		U14 CENTRAL/EDWARD/GRIFFITHS/HILL/PANTYCELY	19	6	25	76%
In-House		U15 CEFN RD/HEOL CELYN/DERW/DEWI/UCHAF/HILL	21	6	27	78%
In-House		U16 ASHGR/BEECH/BRYNGL/MYRTLE/ACACIA/HENGOED	23	6	29	79%

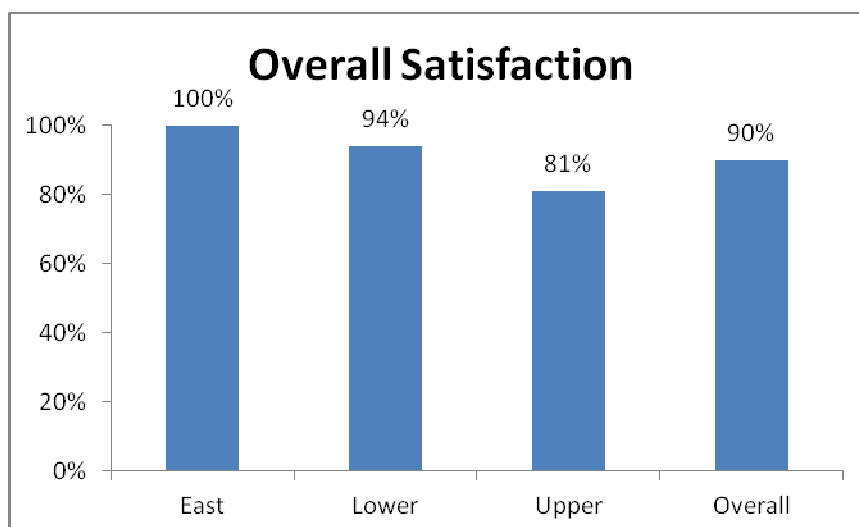
In-House		U17 CHAPEL TERRACE/HAWTHORN AVENUE	26	10	36	72%
In-House		U19 ROWAN PLACE	11	25	36	31%
In-House		U20 ROWAN PLACE	9	27	36	25%
In-House Contractor Sub Total (Includes 43 homes that were already compliant)			439	160	599	73%
Grand Total			517	372	889	58%

4.17 **Tenant satisfaction with the internal works programme 2014-15**

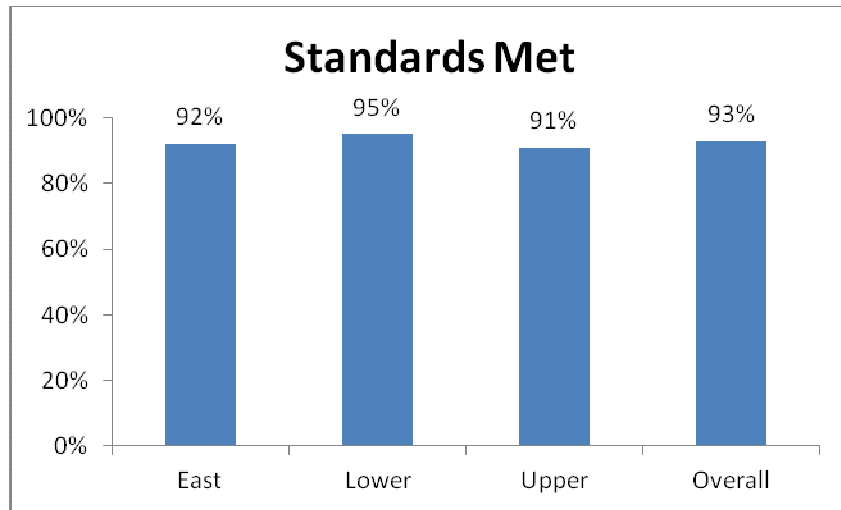
- 4.18 Tenant satisfaction levels and compliance with service standards for internal works are measured via surveys which are sent to tenants after a contract has been completed. The Housing Systems and Performance section administer this service and send surveys out when prompted by managers within the WHQS following full contract completion. This procedure had led to delays in survey cards being sent out and surveys have only recently been sent in relation to contracts in the internal works programme for 2014-15. This was an unsatisfactory surveying method as tenants should receive a survey shortly after the works have been completed when the experience is still fresh in their minds. During 2014-15 a new method of sending out survey forms was introduced based on the date of the sign-off meeting held between tenants, tenant liaison officers and foremen to improve these returns.
- 4.19 This new procedure should have improved the efficiency of the survey process and ensured that timely satisfaction data was produced. However, insufficient completion data has been entered into the Keystone system for a number of properties. The number of surveys sent out for 2014-15 contracts is therefore below the number that should have been sent out. A total of 329 surveys were sent out and 104 were completed which represents an overall return rate of 32%. Of the 104 completed surveys, 10 were completed by tenants within their homes with the assistance of tenant representatives (CSIMs).
- 4.20 Table 4 below provides a summary and breakdown of the returned surveys for each of the WHQS Team operational areas within the County Borough. It shows that the overall satisfaction level for internal works is 90%. It also shows that we are achieving 93% of the standards that we measure within the Charter For Trust document. Charts 1 and 2 display these two measures for each of the WHQS Team operational areas.
- 4.21 Table 4: Satisfaction levels and standards met by WHQS Team operational areas (2014-15).

Area	Surveys Returned	Overall Satisfaction	Standards Met
East	14	100%	92%
Lower	51	94%	95%
Upper	39	81%	91%
Overall	104	90%	93%

4.22 Chart 1: Overall satisfaction levels by WHQS Team operational areas (2014-15).



4.23 Chart 2: Standards met by WHQS Team operational areas (2014-15).



4.24 Table 5 below summarises satisfaction levels and standards met by contractor. Only Contract Services contracts have been surveyed because of the lack of completion data within the Keystone system for the other two contractors. Table 6 below provides survey results per contract where surveys have been undertaken.

4.25 Table 5: Overall satisfaction levels and standards met by contractor (2014-15).

Contractor	Surveys Returned	Overall Satisfaction	Standards Met
Keepmoat (East)	0	N/A	N/A
Contract Services (Lower)	17	88%	94%
Vinci (Upper)	0	N/A	N/A
In-House	87	90%	93%

4.26 Table 6: Overall satisfaction levels and standards met for individual contracts (2014-15)

Contract	Surveys Returned	Overall Satisfaction	Standards Met
LC01 HALDANE COURT	8	100%	95%
LC02 ATTLEE COURT	8	88%	93%
LC03 GREENWOOD COURT	1	0%	92%
E11 HIGH MEADOW - PART 1	8	100%	88%
E12 HIGH MEADOW - PART 2	4	100%	100%
E15 CLYTHA/PENRHIW/TWYN PLACE	2	100%	92%
L09 WEST AVENUE/TY ISAF BUNGALOWS	3	100%	100%
L10 SECOND AVENUE	7	100%	91%
L11 THIRD AVENUE/TEGFAN	1	100%	92%
L12 GRANGE CLOSE	7	100%	99%
L13 THE CRESCENT TRECENYDD	13	91%	98%
L14 HEOL FACH/PEN Y FFORDD/EAST AVE	3	100%	94%
U11 BRYN CARNO	11	50%	88%
U12 GOLWG Y MYNYDD/HIGH ST/TWYN CARNO	6	83%	89%
U13 BRYNMYNACH AVE/COED YR HAF	1	100%	100%
U14 CENTRAL/EDWARD/GRIFFITHS/HILL/PANTYCELY	6	100%	100%
U15 CEFN RD/HEOL CELYN/DERW/DEWI/UCHAF/HILL	5	100%	85%
U16 ASHGR/BEECH/BRYNGL/MYRTLE/ACACIA/HENGOED	4	75%	85%
U17 CHAPEL TERRACE/HAWTHORN AVENUE	4	100%	93%
U18 MISC CATCH UP	2	100%	100%
Overall	104	90%	93%

4.27 **The capital expenditure programme for WHQS works (2014-15)**

- 4.28 The total expenditure on the WHQS capital programme for 2014/15 was £15.3m against an intended budgeted spend of £28.8m.
- 4.29 The high level of underspend, (which equates to 47% of the budget) was predicted throughout the year and reported previously to CHTG. As in 2013/14, previously achieved works were identified on approximately 36% of the total properties in the programme, and a small percentage for refusals. Delays on awarding the internal works contracts and issues with the small lots contract in the Eastern Valley, as well as recruitment problems for appropriately qualified trade and technical staff have also contributed to the shortfall.
- 4.30 To address the anticipated underspend and to maintain the workflow for the in-house team, the 2015/16 WHQS programme has been revised to reflect the slippage coming forward.
- 4.31 Additional works were also identified that were outside of the WHQS programme which could not be delayed to fit into future work programmes, such as heating installations, which accounted for £1.1m of the total spend. Furthermore, WHQS works picked up as part of the response operations which included properties as they become void accounted for £574k.
- 4.32 The valuations that take place throughout the year on the works completed to date are based on the Savills Schedule of Rates (SOR) which has been used to cost up the programmes of work in Keystone. These valuations allow for the costs of the work to be charged to the WHQS capital programme. As part of the merger of the Building Maintenance DLO with the HRA, a WHQS holding account was set up so that the actual costs of the in-house workforce

could be compared with the SOR used to evaluate the work. After the valuations were completed there was some £3.7m of costs in the holding account that had not been recharged to the programme via the valuation process. There are a number of reasons for this variance such as the single source supplier management fee and the in-house workforce bearing higher costs than a private provider which are outside of the teams' control, but also the SOR rates used to undertake the valuation are out of date and do not reflect the full cost of the work being carried out. A new SOR version is imminent which will reflect additional works and up to date prices and should close the variance gap.

4.33 Funding for the 2014/15 programme was met from the Major Repairs Allowance (MRA) given by WG of £7.3m, and revenue contributions from the HRA of £8m. The HRA allowed for the high level of revenue contributions and remained viable at the end of the year.

4.34 The Councils Business Plan (which is required for scrutiny from WG each year and is relied upon to release the MRA funding), allows for the expenditure mentioned in this report and forecasts for the next 30 years. The plan remains viable at this stage.

5. EQUALITIES IMPLICATIONS

5.1 An Equalities Impact Assessment is not needed because the issues covered are for information purposes only, therefore the Council's full EIA process does not need to be applied.

6. FINANCIAL IMPLICATIONS

6.1 There are no direct financial implications arising from this report.

7. PERSONNEL IMPLICATIONS

7.1 There are no direct personnel implications arising from this report.

8. CONSULTATIONS

8.1 Comments received have been incorporated within the report.

9. RECOMMENDATIONS

9.1 The report is for information.

10. REASONS FOR THE RECOMMENDATIONS

10.1 To inform the CHTG of progress in the implementation of the WHQS Programme.

11. STATUTORY POWER

11.1 Housing Acts 1985, 1996 & 2004.

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Consultees: Cllr Dave Poole – Deputy Leader & Cabinet Member for Housing
Cllr Barbara Jones, Deputy Leader & Cabinet Member for Corporate Services
Cllr Keith Reynolds - Leader
Chris Burns – Interim Chief Executive
Shaun Couzens – Chief Housing Officer
Nicole Scammell – Acting Director of Corporate Services & S151 Officer
Colin Roden – WHQS Implementation Project Manager
Alan Edmunds – WHQS Implementation Project Manager
Steve Greedy – WHQS Implementation Project Manager
Jane Roberts-Waite – Strategic Co-ordination Manager - WHQS Programme
Marcus Lloyd – Deputy Head of Programme (WHQS)

Appendices:
Appendix 1 - WHQS budget monitoring report 2014/15

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WHQS PROGRAMME - 2014/15	2014/15 Programme	Location	No of Properties	Start Date	Anticipated End Date	Allocated Estimate (Savills data)	Actuals as Period 12	Commitments	Actual Outturn	Variance to Estimate (Savills data)	Variance to Programme	
7901 UPPER VALLEY INTERNAL WORKS - Contract 1 (INT14D-U11) - Contract 2 (INT14D-U12) - Contract 3 (INT14D-U13) - Contract 4 (INT14D-U14) - Contract 5 (INT14D-U15) - Contract 6 (INT14D-U16) - Contract 7 (INT14D-U17) - Contract 9 (INT14D-U19) - Contract 10 (INT14D-U20) - Contract 8 (INT14C-UC01) - Contract 9 (INT14C-UC02) - Contract 10 (INT14C-UC03) - recharge from Response for WHQS works - Heating Systems outside of contract - Catch Up (2014/15) - (INT14D-U18) - Catch Up (2013/14)	2,625,200	Bryn Carno Golwg Y Mynydd/High St/Twyn Carno Btynmynach Ave/Coed Yr Haf Ystrad Mynach Central/Edward/Griffiths/Hill/Pantycelyn Cefn Rd/Heol Celyn/Derw/Dewi/Uchaf/Hill Hengoed Ash Gr/Beech/Bryngl/Myrtle/Acacia/Hengoed Chapel Tce/Hawthorn Ave Rowan Place - 1 Rowan Place - 2 Mountbatten/Ramsden/Jenkins/Havards Beulah/Duffryn/Forge/Thomasfields Brookfield Ave/Eglwysfan/Brynhyfyrd	38	Nov		-						
			21	Nov		187,250	213,938	157,529	371,467	184,217		
7902 LOWER VALLEY INTERNAL WORKS - Contract 1 (INT14D-L09) - Contract 2 (INT14D-L10) - Contract 3 (INT14D-L11) - Contract 4 (INT14D-L12) - Contract 5 (INT14D-L13) - Contract 6 (INT14D-L14) - Contract 7 (INT14D-L15) - Contract 8 (INT14C-LC01) - Contract 9 (INT14C-LC02) - Contract 10 (INT14C-LC03) - Contract 11 (INT14C-LC04) - Contract 12 (INT14C-LC05) - Contract 13 (INT14C-LC06) - recharge from Response for WHQS works - Heating Systems outside of contract - Catch Up (2014/15) - (INT14D-L16) - Catch Up (2013/14)	3,836,650	West Ave/Ty Isaf Bungalows Second Ave Treceynydd Third Ave/Tegfan Treceynydd Grange Close Treceynydd The Crescent Treceynydd Heol Fach/Pen Y Fford/East Ave Treceynydd Brynceynydd Haldane Ct Lansbury Pk Attlee Ct Lansbury Pk Greenwood Ct Lansbury Pk Alexander Ct Lansbury Pk Buxton Ct Lansbury Pk Graham Ct Lansbury Pk	16	Apr	complete	-						
			30	May		129,250	43,298	31,882	75,180	54,070		
7903 EASTERN VALLEY INTERNAL WORKS - Contract 1 (INT14D-E10) - Contract 2 (INT14D-E11) - Contract 3 (INT14D-E12) - Contract 4 (INT14D-E13) - Contract 5 (INT14D-E14) - Contract 6 (INT14D-E15) - Contract 7 (INT14D-E16) - Contract 8 (INT14D-E17) - Contract 9 (INT14D-E18) - Contract 10 (INT14D-E19) - Contract 6 (INT14C-EC01) - Contract 7 (INT14C-EC02) - Contract 8 (INT14C-EC03) - Contract 9 (INT14C-EC04) - Contract 10 (INT14C-EC05) - Contract 11 (INT14C-EC06) - Contract 12 (INT14C-EC07) - Contract 13 (INT14C-EC08) - Contract 14 (INT14C-EC09) - Contract 15 (INT14C-EC10) - Contract 16 (INT14C-EC11) - Contract 17 (INT14C-EC12) - Contract 18 (INT14C-EC13) - Contract 19 (INT14C-EC14) - Contract 20 (INT14C-EC15) - Contract 21 (INT14C-EC016) - Contract 22 (INT14C-EC017) - Contracts b/fwd - Heating Systems outside of contract - Catch Up (2013/14)	4,969,750	Elm/Lime/Oak/Penycaeau Court High Meadow - Part 1 High Meadow - Part 2 Central Ave - Part 1 Lower Pantside Central Ave - Part 2 Lower Pantside Clytha/Penrhwi/Twyn Pl Llanfach Elm Drive - Evens part 1 - Upper Ty Sign Elm Drive - Evens part 2 - Upper Ty Sign Elm Drive - Odds Upper Ty Sign Lower Pantside Perth Ct/Adelaide Ct Upper Trelyn Melbourne Ct/Sydney Ct Upper Trelyn Brisbane Ct/Cwrt Y Waun Upper Trelyn Dylan Ave/Pwllglas Rd Cefn Fforest St Margarets Ave/Fairview Cefn Fforest Cefn Forest Ave/Tynnycoed Cres Davies St/Bryngoleu St/Bryn Rd Greenwood Rd/Wheatley Place Addison S/Bevan Cres Waunborfa/Twynyffald/Old Police Station Bedwelty Rd Pencoed Ave - Part 1 Pencoed Ave - Part 2 Pencoed Ave - Part 3 Penybryn Ave/Marianwen St Central Ave/Craiglas/Derwendeg Ty Bedwelty	26	May		175,300	206,120	151,773	357,893	182,593		
			16	Jun		115,300	96,192	70,829	167,021	51,721		
7904 UPPER VALLEY EXTERNAL WORKS (CR) - Contract 1 (EXT14C-U01)	7,088,065	Phillipstown	160			1,011,790			0	-1,011,790		
						5,403,237	2,203,030	636,850	2,839,880	2,563,357	2,129,870	
		Various - heating installations		-	-	0	294,255	294,255	294,255		294,255	
		Various/Misc catch up/(2014/15)		30	-	-	203,950	109,582	80,689	190,271	13,679	
		Various/Misc catch up/(2013-14 appendix 1a)		-	-	-	0	280,638	206,643	487,281	487,281	
							3,458,848	2,449,455	1,394,902	3,844,357	385,509	1,219,157
		Various - heating installations		-	-	0	186,668	186,668	186,668		186,668	
		Various/Misc catch up/(2014/15)		-	-	-	27,050	18,129	13,349	31,478	4,428	
		Various/Misc catch up/(2013-14 app 1a)		-	-	-	0	98515	72,540	171,055	171,055	
							3,862,800	1,919,637	926,840	2,846,477	1,016,323	990,173
		Various - heating installations		-	-	0	2,561	2,561	2,561		2,561	
		Various/Misc catch up/(2014/15)		-	-	-	0	186,668	186,668	186,668	186,668	
		Various/Misc catch up/(2013-14 app 1a)		-	-	-	0	98515	72,540	171,055	171,055	
							3,862,800	1,919,637	926,840	2,846,477	1,016,323	990,173
		Elm/Lime/Oak/Penycaeau Court		33	Apr		266,350	304,860	224,478	529,338	262,988	
		High Meadow - Part 1		26	May		175,300	206,120	151,773	357,893	182,593	
		High Meadow - Part 2		16	Jun		115,300	96,192	70,829	167,021	51,721	
		Central Ave - Part 1 Lower Pantside		13	Jul		143,800	10,156	7,478	17,634	126,166	
		Central Ave - Part 2 Lower Pantside		17	Aug		162,100	18,099	13,327	31,426	130,674	
		Clytha/Penrhwi/Twyn Pl Llanfach		24	Apr		182,300	3,985	2,934	6,919	175,381	
		Elm Drive - Evens part 1 - Upper Ty Sign		29	Apr		76,000	-	-	-	76,000	
		Elm Drive - Evens part 2 - Upper Ty Sign		31	Apr		85,250	-	-	-	85,250	
		Elm Drive - Odds Upper Ty Sign		19	Apr		51,250	-	-	-	51,250	
		Lower Pantside		8	Nov		38,687	19,861	-	19,861	18,826	
		Perth Ct/Adelaide Ct Upper Trelyn		25	Nov		265,250	206,082	-	206,082	59,168	
		Melbourne Ct/Sydney Ct Upper Trelyn		27	Nov		281,950	220,322	-	220,322	61,628	
		Brisbane Ct/Cwrt Y Waun Upper Trelyn		27	Nov		284,550	218,169	-	218,169	66,381	
		Dylan Ave/Pwllglas Rd Cefn Fforest		35	Nov		331,250	37,397	-	37,397	293,853	
		St Margarets Ave/Fairview Cefn Fforest		33	Nov		285,250	-	-	-	285,250	
		Cefn Forest Ave/Tynnycoed Cres		23	Nov		222,850	-	-	-	222,850	
		Davies St/Bryngoleu St/Bryn Rd		19	Nov		175,550	-	-	-	175,550	
		Greenwood Rd/Wheatley Place		24	Nov		212,450	-	-	-	212,450	
		Addison S/Bevan Cres		21	Nov		209,400	-	-	-	209,400	
		Waunborfa/Twynyffald/Old Police Station		27	Sep		282,750	-	-	-	282,750	
		Bedwelty Rd		28	Oct		288,050	-	-	-	288,050	
		Pencoed Ave - Part 1		25	Nov		184,129	-	-	-	184,129	
		Pencoed Ave - Part 2		26	Nov		191,494	-	-	-	191,494	
		Pencoed Ave - Part 3		15	Nov		110,477	-	-	-	110,477	
		Penybryn Ave/Marianwen St		25	Sep		239,700	-	-	-	239,700	
		Central Ave/Craiglas/Derwendeg		27	Oct		273,050	-	-	-	273,050	
		Ty Bedwelty		25	Nov		268,750	-	-	-	268,750	
		Various - heating installations		-	-	-	0	636,303	-	636,303	636,303	
		Various/Misc catch up/(2014-15)		-	-	-	0	225484	166,031	391,515	391,515	
		Various/Misc catch up/(2013-14 app 1a)		-	-	-	0	225484	166,031	391,515	391,515	
							5,403,237	2,203,030	636,850	2,839,880	2,563,357	2,129,870

- Contract 2 (EXT14C-U02)		Tir Phil/New Tredegar	195			0			0	0	
- Contract 3 (EXT14C-U03)		Aneurin Bevan Ave/Heol Cattwg	73			407,705			0	-407,705	
- Contract 4 (EXT14C-U04)		Claerwen/Gaer Place/Dan Y Gaer	95			338,790			0	-338,790	
- Contract 5 (EXT14C-U05)		Church Rd/Heol Ed Lewis/Penallda/Penywry	64			297,820	6031		6,031	-291,789	
- Contract 6 (EXT14C-U06)		Heol y Waun/Sr Cattwgs/Waunyrhydd	49			246,600			0	-246,600	
- Contract 7 (EXT14C-U07)		Greenhill Pl/Haman Pl	55			289,940			0	-289,940	
- Contract 8 (EXT14C-U08)		Brynglas/Brynhyfyd	94			91,370			0	-91,370	
- Contract 9 (EXT14C-U09)		Pontlloftyn Phase 1	65			265,940			0	-265,940	
- Contract 10 (EXT14C-U10)		Pontlloftyn Phase 2	95			248,231			0	-248,231	
- Contract 11 (EXT14C-U11)		Rowan Place				436,010			0	-436,010	
- Contract 12 (EXT14D-U01)		Various/Misc catch up/(2013-14 app 1a)				0	547020	402,789	949,809	949,809	
						0	1660	0	1,660	1,660	
						3,634,196	554,711	402,789	957,500	-2,676,696	6,130,565
7905 LOWER VALLEY EXTERNAL WORKS (AE)	1,511,890										
- Contract 1 (EXT14D-L01)		Abertridwr	120			391,970	471007	346,818	817,825	425,855	
- Contract 2 (EXT14D-L02)		Nantddu	54			124,400	5000	3,682	8,682	-115,718	
- Contract 3 (EXT14D-L03)		Heol Trecestell	53			160,250	10000	7,363	17,363	-142,887	
- Contract 4 (EXT14D-L04)		Bedwas	216			1,045,920			0	-1,045,920	
- Contract 5 (EXT14D-L05)		Machen	63			317,080			0	-317,080	
- Contract 6 (EXT14D-L06)		Rudry/Trapwell	29			97,290			0	-97,290	
- Contract 7 (EXT14D-LC01)		Bronmynydd painting	11			14,750			0	-14,750	
- Contract 8 (EXT14D-LC02)		Ilan Road painting	48			125,750			0	-125,750	
									0		
						2,277,410	486,007	357,863	843,870	-1,433,540	668,020
7906 EASTERN VALLEY EXTERNAL WORKS (CR)	2,832,408										
- Contract 1 (EXT14C-E01)		Markham/Hollybush - Phase 1	83			490,450	397656		397,656	-92,794	
- Contract 2 (EXT14C-E02)		Oakdale	73			499,310			0	-499,310	
- Contract 3 (EXT14C-E03) A,B,C & D		Blackwood	285			565,008			0	-565,008	
- Contract 4 (EXT14C-E04)		Newbridge/Westend	69			912,175			0	-912,175	
- Contract 5 (EXT14C-E05)		Morrisville/Wattsville	63			521,600			0	-521,600	
- Contract 6 (EXT14C-E06)		Argoed	30			154,625			0	-154,625	
- Contract 6 (EXT14C-E07)		Markham/Hollybush - Phase 2	53			451,175			0	-451,175	
- Contract 6 (EXT14C-E08)		Persondy/Westend	22			9,750			0	-9,750	
- Contract 6 (EXT14C-E09)		Ynysddu/Cwmfelinfach	42			254,665			0	-254,665	
		Various/Misc catch up/(2013-14 app 1a)							0	0	
						3,858,758	397,656	0	397,656	-3,461,102	2,434,752
7907 WHQS FEES & CONSULTANCY	1,800,000										
						1,800,000	1683	1,434,736	1,436,419	-363,581	363,581
7908 ADAPTATIONS	1,000,000										
						1,000,000	927,924		927,924	-72,076	72,076
7909 LARGE SCALE VOIDS	500,000										
						500,000	496,259		496,259	-3,741	3,741
7910 GARAGES/OTHER ASSETS	500,000										
		Ty Sign				500,000	234294		234,294	-265,706	265,706
7911 CONTINGENCY & INITIATIVES											
- Community Safety Initiatives	50,000					50,000	33350		33,350	-16,650	
- Community Investment Fund	50,000					50,000	5000		5,000	-45,000	
- Sheltered fund	50,000					50,000	0		-	50,000	
- Contingency	1,000,000					1,000,000	259214	-	259,214	-740,786	
		CCTV install £23k plus pre WHQS costs				1,150,000	297564	0	297,564	-852,436	852,436
						1,000,000	30107.99	-	30,108	-969,892	969,892
7912 ENERGY CONSERVATION	1,000,000										
7913 ALL AREAS - INT/EXT - IN HOUSE											
- Non Trads (NON13D-E01)		Trinant - Trinant & Meadow Rd				10,100	101082		101,082	90,982	
						10,100	101082	0	101,082	90,982	101,082
7914 ALL AREAS - INT/EXT - CONTRACTOR											
- Non Trads (NON13C-L01)		Bedwas - Brynglas/B.Goleu/B.Trig/B. Tirion/Rectory Rd				360,160	90686		90,686	-269,474	
- Non Trads (NON13C-U01)		Hengoed - The Bungalows/Heol Dewi /Hengoed Rd				532,180	0	0	-	532,180	
						892,340	90686	0	90,686	-801,654	90,686
TOTAL PROGRAMME	28,813,963					29,347,689	10,190,096	5,153,980	15,344,076	-14,003,613	-13,469,887
							35%				-46.75%

FUNDED BY:											
MRA	7,300,000								7,330,000	-	30,000
RCCO WHQS (inc b/fwd cap balances)	19,713,963								6,579,340		13,134,623
RCCO DELIVERY TEAM	1,800,000								1,434,736		365,264
	28,813,963								15,344,076		13,469,887

WHQS (in-house) holding account

Salaries (Inc Agency & Mileage)	3,671,775
Materials	2,987,613
Sub Contractors	1,138,391
Overheads	1,307,243
Income	-
	<u>336,087</u>
	8,768,935

Total valuations

VAL 1	806,560
VAL 2	889,738
VAL 3	272,254
VAL 4	361,610
VAL 5	278,423
VAL 6	844,671
VAL 7	343,980
VAL 8	980,672
VAL 9 (wip)	271,785
VAL 10 (year end adj)	3,719,243
	<u>8,768,936</u>

Difference -

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