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(Tel: 01443 864210 Email: evansca1@caerphilly.gov.uk)

Date: 28th June 2017

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, 6th July, 2017** at **5.30 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 16th February 2017.

1 - 6

A greener place Man gwyrddach



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

4 Review of Housing Service Charges. 7 - 14

To receive and note the following information items: -

5 Housing Revenue Account Outturn 2016/2017. 15 - 22

6 Well Being Objective WO5 - Investment in Council Homes to Transform Lives and Communities. 23 - 36

7 Year End Performance Report for Caerphilly Homes. 37 - 58

**If a member of the Caerphilly Homes Task Group wishes for the above information report(s) to be brought forward for discussion at the meeting, please contact Charlotte Evans on 01443 864210, by 10a.m. on Wednesday 5th July 2017.*

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

Circulation:

Task Group Members: Mrs Y. Bryant, M. Davies, Miss E. Forehead, L. Harding, A. Hussey, Ms S. Jones, Miss A. Lewis, Mrs D. Moore, Mr J. Moore, L. Phipps, Mrs D. Price and L.G. Whittle,

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, 16TH FEBRUARY 2017 AT 5.00 P.M.**

PRESENT:

A. Lewis – Vice Chair (Presiding)

Task Group Members:

L. Ackerman, Mrs Y. Bryant, C. Davies, Ms J. Gale, K. James, Mrs B. Jones, Mrs S. Jones, Ms A. Lewis, C. Mann, Mrs D. Moore, J. Moore and D.V. Poole.

Officers:

S. Couzens (Chief Housing Officer), M. Lloyd (Deputy Head of Programmes), F. Wilkins (Public Sector Housing Manager), G. Taylor (Tenant Participation Officer), E. Bayliss, M. Betts (Tenant and Community Involvement Manager) and C. Evans (Committee Services Officer)

1. APOLOGIES

Apologies for absence were received from Councillor Miss E. Forehead (Chair).

2. DECLARATIONS OF INTEREST

Councillor Mrs B. Jones and Tenant Representatives Mrs Y. Bryant, C. Davies, Mrs S. Jones, Ms A. Lewis, Mrs D. Moore and Mr J. Moore declared a personal but not prejudicial interest in all agenda items as Council Tenants.

3. MINUTES – 15TH DECEMBER 2016

RESOLVED that the minutes of the meeting held on 15th December 2016 be approved as a correct record and signed by the Chair.

4. RE-PROFILING OF WHQS PROGRAMME AND HRA CAPITAL PROGRAMME 2017/2018.

The report was considered by Caerphilly Homes Task Group (CHTG) on the 16th February 2017 and sought views prior to its presentation to Policy and Resources Scrutiny Committee and Cabinet.

CHTG noted that there has continued to be progress and slippage with the WHQS delivery programme during 2016/17. As such it has been necessary to review and update the current delivery programme. The report sets out the proposed changes. The majority of the internal work changes have resulted in work being brought forward in the programme. In regard to the

external works programme the majority of the changes have resulted in works being moved to future years.

The Sheltered Housing Scheme approach has now altered with the works being delivered by the in-house teams. This work has now been built into the forward works programme.

The HRA Capital Programme budget allocates the necessary resources based on the Savills cost plan. Work is underway to amend this approach so that in future it will be based on actual costs being achieved for works undertaken which provides a more realistic projection in relation to the proposed budget expenditure. These figures will be continually reviewed and assessed to provide the most accurate forecast possible for budget planning.

The Task Group discussed the report at length and sought further information on tenant involvement in future contract recruitment, the DPS process and the risk of poor craftsman being allowed to retender. Officers explained that tenant involvement would come at a later stage in the process and were assured that any contractors that were removed from the process in the past or there are concerns for quality of work, unless they can demonstrate improvement, would not be invited to tender. The Task Group raised serious concerns over the continued use of the Savills Survey, on the basis that the surveys are ineffective and out of date. Officers reassured the Task Group that the Savills survey will shortly be replaced for internal works, as there is sufficient information available from the works conducted to provide estimates for future works. At present, there has not been enough completed external works to provide the same information, however, the Task Group were assured that Savills surveys will no longer be in use after 6 months, should sufficient data be collected.

Following consideration and discussion, it was moved and seconded that the recommendations in the report be approved. 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 note the contents of the report prior to its consideration at Policy and Resources Scrutiny Committee and Cabinet.

5. WHQS ENVIRONMENTAL PROGRAMME

The report provided the Task Group with a detailed overview of the Welsh Housing Quality Standard (WHQS) environmental programme for their information.

It was noted that, following the ballot in February 2012, the Council agreed that it would deliver the promises made in its Offer Document to tenants and deliver the WHQS by March 2020. The Council also agreed that its capital investment in homes would deliver social outcomes to 'transform lives and communities'.

Part of the commitment to deliver the WHQS across all 10,865 homes also included a requirement to comply with Part 6, which aims to ensure that 'all dwellings should be located in an environment to which residents can relate and in which they can be proud to live'. As a result, £10.6m has been set aside in the business plan agreed with Welsh Government specifically for this purpose.

The Task Group noted that three Environmental Officers were recruited to work with the Area Housing teams and local members in order to initially identify environmental maintenance/repair issues. The issues were identified and collated into a single spreadsheet with each project being detailed in a proforma.

Over 300 projects have been identified across the county borough to date and colleagues across several departments have become involved in providing support and advice, with many projects requiring specialist input from Highways, Waste and Parks Services in order to

assess feasibility and options. The Task Group would be provided with a more detailed report in the Spring, following the completion of the consultations.

The Task Group thanked the Officer for the report and discussion ensued. A Tenant Representative expressed their disappointment that the process was only in the research stage, as well as the low level of funding available for projects. Officers explained that additional work is underway to identify funding for projects across the borough, which includes Groundworks and National Lottery Funding.

Clarification was sought on the criteria for the projects and it was noted that the funding has been set aside for areas that fall outside of WHQS scoping, such as car parks, fencing, knee rails etc. It was asked to note that schemes are under consideration for which there would be little to no ongoing maintenance, therefore playgrounds would not meet the criteria.

The Task Group raised their concerns for the lack of consultation with tenants at this point, especially as the projects are aimed to improve the aesthetics of the environment, however, the Task Group were asked to note that the report was for information, however, a more detailed report would be brought to the Task Group for consideration, at a later meeting.

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

6. LEASEHOLDER CHARGES

The report, which was in response to a Member's request for further information on leaseholder legislation, process and good practice, was considered by the Policy and Resources Scrutiny Committee on 17th January 2017.

It was noted that there are currently 417 flats within the Council's housing stock now owned by leaseholders, following their sale under the Right to Buy (RTB) scheme. The Council has continuing responsibilities to maintain the external structure and communal areas of the blocks of flats. The leaseholder procedures in respect of these properties are in line with legislation and national guidance, and are currently being reviewed by Legal Services.

This report covered leaseholder legislation, associated processes including consultation and procurement financial obligations of leaseholders, including charges and payment options, and good practice guidance.

The Task Group thanked the Officer for the report and discussed at length. Further detail was sought on the make up of the Leaseholder Tribunal. It was noted that this is a Public/ external body and is made up of experts in the field from external organisations, and is completely independent of the Council.

Discussions took place around a Leaseholder Forum. It was noted that there isn't one at present, due to limited interest in the past, however it is something that could be reintroduced and would possibly have more success. There is a number of correspondence being sent out, but an informal setting may be more beneficial.

The Caerphilly Homes Task Group noted the report.

7. ROWAN PLACE, RHYMNEY – PROPOSED DEMOLITION OF FLATS – BLOCK 65-68.

The report, which was considered by Cabinet on 18th January 2017, sought Cabinet approval to demolish an additional block of flats in Rowan Place, Rhymney in conjunction with the improvement of the physical condition of the estate.

The Task Group noted that following the identification of severe damp and external defects to the external fabric of the properties in Rowan Place, a major investment programme is currently being undertaken to bring the properties up to the WHQS. Following the demolition of one block of four flats of the remaining 68 Council owned stock, 44 of the properties are 2 bedroom flats comprising 11 blocks. This is a large concentration in a very small area.

It was noted that, following Cabinet approval to demolish one block of flats to reduce the density of the estate, and in recognition that there remain a large number of two bedroom flats, further approval was granted to demolish an additional block due to ongoing low demand in the area, to enhance the environmental aspect of this estate and to achieve financial savings.

The Task Group were informed that whilst Cabinet had endorsed the report, queries were raised regarding the void issues in Rowan Place and it was noted that there has been extensive work undertaken to improve the overall aesthetics of the estate, and a number of events held, such as fun days, open days and barbeques to raise the profile and encourage further lettings, to no avail.

The Task Group thanked the Officer for the report and discussion ensued. A Task Group Member queried the level of advertising in Rhymney and it was noted that there has been one advert posted within the town. Officers highlighted that a number of leaflets and posters have been sent to Local Businesses, as well as the Post Office and Library, however, Officers will look into this.

A Task Group Member sought further information on the lessons learnt as a result of the extensive work conducted within Rowan Place and the difficulties leasing the premises. Officers explained that the estate originally attracted a lot of single people, due to the high density of flats and as a result, there were high levels of crime. Extensive works have been conducted to improve the environment and homes within the estate, with the aim to attract families, as well as single people and provide a more desirable place to live. In addition, the works required were as a result of surveys highlighting damp issues and it is hoped that tenants would be more inclined to report any issues.

Further information was sought on the Leaseholders living within the proposed block, Officers explained that they have agreed to move to an alternative premises within the state.

The Task Group were asked to move that the Welsh Government have also now approved the application to demolish the block of flats.

The Caerphilly Homes Task Group noted the report.

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

1. An update report was requested on the Community Fund and options for going forward.
2. A report was requested on the number of Acceptable Fails and an update on the progress and status?
3. A report was requested on the number of partial works undertaken and number of full works???
4. A Report was sought on the financial- rents/ arrears?
5. An update was requested on the Handheld devices.
6. Training was requested on the Wellbeing and Future Generations Act and how this impacts on Housing.

The meeting closed at 6.44 p.m.

Approved as a correct record subject to any amendments or corrections agreed and recorded in the minutes of the meeting held on 30th March 2017.

CHAIR

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CAERPHILLY HOMES TASK GROUP – 6TH JULY 2017

SUBJECT: REVIEW OF HOUSING SERVICE CHARGES

REPORT BY: CORPORATE DIRECTOR - COMMUNITIES

1. PURPOSE OF REPORT

- 1.1 To obtain the views of the Caerphilly Homes Task Group on the review of how service charges are collected within Sheltered Housing and the need to review service charges for General Needs accommodation, prior to its presentation to Policy and Resource Scrutiny Committee and Cabinet.

2. SUMMARY

- 2.1 This report recommends the introduction of a fair and transparent system for recovering service charges from sheltered housing tenants for services provided.
- 2.2 The Housing (Wales) Act 2014 imposed a new duty for local housing authorities to comply with standards for housing quality, rents and service charges. Local authorities are required to review the way in which charges for services are claimed to ensure that tenants are only charged for services that they receive. Detailed guidance has not been provided but it is required that service charges fairly reflect costs incurred and be transparent with a detailed breakdown provided to tenants so they can see what they are paying for.
- 2.3 The Authority currently recovers its costs for services it provides to tenants in sheltered housing schemes by smoothing the cost of these services between all tenants within all of the schemes. This is contrary to Welsh Government policy. It is proposed that, in future, the Authority recovers from tenants the actual cost of providing services in their individual scheme, based on the calculated cost of providing the services in the previous financial year.
- 2.4 Most general needs service charges are not currently depooled and will not be considered in detail within this report, however, in order to comply with Welsh Government policy, a further report proposing the de-pooling of service charges for general needs tenants will be required.

3. LINKS TO STRATEGY

- 3.1 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'.
- 3.2 The Authority's Local Housing Strategy 'People, Property and Places' has the following aims:- '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'.
- 3.3 The Wellbeing of Future Generations Act 2015 sets out the following wellbeing goals which link with the aims of this report:-

- A resilient Wales
- A prosperous Wales
- A healthier Wales
- A more equal Wales
- A Wales of cohesive communities
- A globally responsible Wales

4. GENERAL – SERVICE CHARGES

- 4.1 The Landlord & Tenant Act 1985 defines a service charge as: ‘*An amount payable by a tenant of a dwelling as part of or in addition to the rent which is payable directly or indirectly for services, repairs, maintenance, improvements or insurance or the landlord’s costs of management and the whole or part of which varies or may vary according to the relevant costs.*’ The Act also advises that services charges, provision of services and/or works, the standard of work and any payments in advance must be reasonable.
- 4.2 A service charge is a payment made by a tenant or leaseholder towards the cost of services and repairs beyond those specifically for their property. For example, for tenants living in a sheltered housing scheme with communal lounge facilities, the cost of providing the communal facilities is covered by a service charge because it is available to all residents of the scheme.
- 4.3 Charges can only be made for services currently being received. Tenants have to be consulted prior to the introduction of any new services. Services covered by such charges may include but are not limited to:
- Staff cover (including sickness/absences)
 - Management/administration charges
 - Employing a Community Environmental Warden
 - Grounds maintenance work
 - Cleaning costs e.g. communal areas
 - Internal/external improvements e.g. car parking
 - Decoration of communal areas
 - Building Managers Health & Safety maintenance checks, e.g. Fire safety, legionella
 - Utility costs
 - Installation, maintenance and/or repairs to:
 - Door entry systems
 - TV aerials
 - Internal, external and emergency lighting
 - White goods, communal furniture, fittings & equipment
 - Laundry services and drying areas
 - Lifts & communal adaptations
 - CCTV
- 4.4 Local authorities have historically included the cost of providing services in the rent charged to all tenants, regardless of whether all tenants receive the service. This pooled approach is easier for local authorities to administer than itemised charges but it is not fair and transparent for tenants. It can result in loss of revenue and some tenants paying for services they do not receive.
- 4.5 The costs of providing services to tenants of sheltered schemes have long been de-pooled from rents and service charged to sheltered housing tenants. Currently these service charges are based on historical actual costs that have been subject to agreed annual percentage increases for a number of years. The costs of all the services are combined and are smoothed across all tenants of all sheltered schemes irrespective of whether or not they receive all of the services. It is recognised that the combining and smoothing of service charges and the imposition of annual percentage increases do not accurately reflect actual annual costs,

resulting in the Authority subsidising any shortfalls.

- 4.6 Through service improvements and the current Welsh Housing Quality Standard (WHQS) sheltered housing programme of work, the Authority continues to seek ways of reducing service charges to tenants and promoting sustainability for the future, for example, energy efficiency initiatives, including improvements to heating systems, insulation and energy efficiency lighting.

5. SHELTERED HOUSING

- 5.1 Sheltered Housing comprises groups of unfurnished units of accommodation (bungalows, flats or bedsits) designed to meet the needs of older people. The aim of sheltered housing is to enable older people to live as independently as possible with the added security of support from dedicated Sheltered Housing staff. It also gives residents the opportunity to make friends and to socialise through the use of communal facilities and activities. There are 34 sheltered housing schemes comprising of 987 units of sheltered housing in the Caerphilly Borough, 15 of these are under one roof and one is an 'extra care' scheme.
- 5.2 For the majority of Council tenants in sheltered housing, the cost of meeting most service charges is covered by housing benefit, either in part or in full. There are currently 215 sheltered tenants who are not in receipt of any housing benefit, with 710 tenants on part or full housing benefit. The findings of the recent UK government's 'Supported Housing Review' are potentially significant for the future funding of all types of supported housing in Wales. It is proposed that from April 2019 all tenants will receive Housing Benefit only up to the Local Housing Allowance limit. Any additional top-up funding required, such as that for service charges, will be devolved to Welsh Government. Arrangements are yet to be determined so there is still significant uncertainty and until these changes have been confirmed we are unable to accurately assess the potential impact on tenants of sheltered housing schemes.
- 5.3 Throughout the County Borough utility charges in sheltered accommodation have also been de-pooled. Utility charges for communal facilities in sheltered housing and for units of accommodation that do not have individual metering are smoothed across each specific scheme against actual usage and shown as a separate charge on the tenant's rent account. Notification is provided annually by letter to tenants at the end of August/beginning of September. Through the WHQS programme of works for sheltered accommodation we are continuing to increase the number of schemes with individual utility metering for units of accommodation which will further reduce incidences of smoothing.
- 5.4 As detailed in 4.5, other than utility charges, management services for sheltered housing tenants are combined and smoothed across the tenants of all sheltered housing schemes. These tenants do not get a breakdown of this service charge as it is detailed as one payment in addition to their rent charge on their rent account. For 16/17 all sheltered housing tenants were charged £23.49 per week. Point 4.3 above provides examples of services that are charged.
- 5.5 Many tenants have expressed frustration that they are not able to have a clear breakdown of their service charges to compare with the services that they receive.
- 5.6 It is recognised that smoothed charges can result in:
- Under and over charging of tenants across schemes
 - Tenants contributing towards a service they do not receive, and that may be neither available nor necessary within their scheme
 - Tenants being unaware that they are paying for a service
 - Services provided and the quality of services may not reflect the needs and aspirations of tenants
 - The cost to the landlord being unclear, with the possibility of under or over recovery of costs.

- Difficulty demonstrating that a particular service provides value for money

5.7 Basing charges on actual costs per scheme gives the opportunity to:

- Become more fair, transparent and equitable in our provision of services to tenants
- Better evidence the cost of provision of services
- Improve the quality of the services provided to tenants
- Increase levels of satisfaction of the tenants
- Consult tenants on individual service charges
- Become more responsive to the needs and aspirations of tenants within individual schemes
- Better support those tenants applying for, or in receipt of, Universal Credit

5.8 Extensive work has recently been undertaken to identify those services provided to individual sheltered schemes and the accurate expenditure costs of providing services to those who receive them. We have undertaken a cost analysis per scheme for the past two years. This has provided an actual cost per scheme which can be compared against the charges made to tenants to evidence not only the range of costs between schemes but also the level of subsidy funded within the service.

| | Weekly service charge to tenant | Lowest actual weekly cost | Highest actual weekly cost | Average weekly cost | Average weekly subsidy | Total subsidy per annum |
|---------|--|----------------------------------|-----------------------------------|----------------------------|-------------------------------|--------------------------------|
| 2014/15 | 22.58 | 22.34 | 48.74 | 29.66 | 7.08 | 326,926 |
| 2015/16 | 23.03 | 20.93 | 42.24 | 26.47 | 3.44 | 158,845 |

5.9 As can be seen in the table above the range of costs between schemes varies year on year depending on what is provided at each scheme and previous charges are not necessarily an indicator of charges for future years (e.g. cyclical refurbishments). The table demonstrates that actual costs have reduced by some 10% on average, but there is still a significant under-recovery of costs, as demonstrated by the levels of subsidy. This ranges from 31% in 2014/15 to 15% in 2015/16. The above costs per scheme are unlikely to accurately reflect the costs going forward, and it is difficult to predict with certainty what the likely impact for tenants each year is in advance.

5.10 It has been established that the Authority currently has the capacity to charge for services based on the actual costs incurred in the previous financial year. It has also been established that, as with utility charges, notification can be provided annually to tenants during August/September. The cost of the yearly service would be divided into equal amounts based on the number of rent collection weeks and the number of tenant households receiving the service.

5.11 As charges would be calculated on the actual costs of services provided for each sheltered scheme, these charges will vary for each scheme due to the variation in the size of the scheme, and the nature and number of services provided. This proposal would be a significant change in the approach to recovery of service charges. Whilst some tenants will benefit from a reduction in charges, it will also result in increased costs to tenants of some schemes.

5.12 As a preliminary forecast for charges in 2017/18, using the most up to date actual costs currently available (2015/16 costs rather than the 2016/17 costs which are not yet available) and the current service charge of £23.49, 72% of tenants could be subjected to an increase in service charges, with 28% having a reduction. The average tenant increase would be £3.89 with a potential maximum increase of £18.75 in one scheme. The average reduction would be £1.03 with maximum reduction of £3.99.

- 5.13 It is proposed that transitional arrangements will initially be introduced for two years following implementation of the changes, to assist existing tenants in adjusting to them, following which their continuation will be subject to review by officers. It is further proposed that during the transition period service charge increases will be capped so as not to exceed the agreed annual rent increase by more than £1, therefore, the maximum service charge for 2017/18 will be £27.35 per week, an increase of £3.86. It is also proposed that if capped charges within a scheme reach actual costs, the transitional arrangements for that scheme will end.
- 5.14 It is recognised that some tenants will be concerned about future affordability but there will be options available for tenants, in addition to practical support from officers in relation to income maximisation. This could include the possibility of a move to alternative accommodation with lower or no service charges, or a review of existing services that may result in a reduction in levels of services provided, subject to full consultation at the individual schemes. It may also be possible to meet any requests for enhanced services, albeit for an increased cost, for example to return to full time Sheltered Housing Officer cover.
- 5.15 As mentioned in 4.6 above, the sheltered housing WHQS programme is now underway so consideration is being actively given to improvements that have the potential to reduce service charges for tenants. Such initiatives could include new energy efficient heating systems, independent utility supplies and meters, review of laundry facilities, energy efficiency lighting and other efficiency measures.
- 5.16 A communication and information plan is in place for raising awareness in preparation for the implementation of any agreed changes following the service charge review. Sheltered Housing Officer awareness sessions have been completed and tenants meetings were held in February/March at each scheme. The meetings included a discussion around the service charges review to raise the awareness of tenants and to respond to any questions or concerns they may have. Feedback from tenants was largely positive and tenants welcomed the opportunity to have a breakdown of their service charges based on actual expenditure. There will be further communication to tenants through a range of media sources prior to implementation of any changes.
- 5.17 Tenants will not be able to opt out of paying any element of service charges for their scheme if they do not use a service, for example the laundry room, however, consultation with tenants for future service provision, such as the opportunity to receive enhanced or reduced services will be the standard approach for the future.

6. GENERAL NEEDS

- 6.1 The term 'General Needs Housing' is used to describe housing for rent that is suitable for anyone over the age of 16 including single people, couples or families. In common with many other Local Authorities this Authority has traditionally included the cost of providing additional services to tenants of general needs accommodation in the rent charged to all tenants, regardless of whether or not they benefit from a particular service. Services commonly provided for general needs accommodation include but are not limited to:
- Installation, maintenance and repairs to door entry systems
 - Communal lighting
 - Cleaning of communal areas and employment of Community Environmental Wardens
 - Maintenance of grounds and communal facilities
- 6.2 This traditional approach to service charges is no longer considered to be acceptable moving forward, following the introduction of the Housing (Wales) Act 2014 as the current Welsh Government policy for social housing rents requires Local Authorities to disaggregate, or de-pool, service charges from rents. Also, whilst under current housing benefit regulations most service charges are covered by Housing Benefit, with the introduction of Universal Credit tenants are increasingly required to provide information on the breakdown of rents and service charges as part of their application for assistance. Authorities, therefore, need to separate and

show these costs.

For these reasons, and also for reasons of fairness and transparency, most stock retaining Local Authorities in Wales have now completed or are working towards the de-pooling of service charges across all of their accommodation.

- 6.3 The Authority has already begun to introduce service charges for new services provided to new tenants, and has also consulted with some existing tenants on the possibility of introducing service charges for new services, however, the introduction of service charges for existing tenants and services will be the subject of a future report to Members in the near future. As the introduction of service charges for existing tenants would require a review of the Tenancy Agreement it is currently planned to coincide this review with the review that will be required to implement the Renting Homes (Wales) Act 2016.

7. WELL-BEING OF FUTURE GENERATIONS

- 7.1 This report contributes to the Well-being Goals as set out in Links to Strategy above. It is consistent with the five ways of working as defined within the sustainable development principle in the Act in that:

Long Term – improving and future proofing our properties; providing affordable housing for tenants; providing a fair and transparent service to tenants

Prevention – providing well maintained, safe, warm and secure homes; preventing disrepair and promoting low maintenance for the future

Integration – improved standards of housing and community environments

Collaboration – joined up working arrangements within in-house teams and cost effective procurement arrangements

Involvement – tenant meetings, consultation and information updates to obtain the views of the residents

8. EQUALITIES IMPLICATIONS

- 8.1 An Equalities Impact Assessment is not needed as this report is recommending changes to the manner in which existing charges are calculated, therefore the Authority's full EIA process does not need to be applied.

9. FINANCIAL IMPLICATIONS

- 9.1 Despite a willingness to review the appropriateness and level of service charges within schemes there is a risk of an increase in the number of low demand properties and higher rent and service charge arrears.
- 9.2 There will be a reduction in the likelihood of under recovery of the costs of providing services and any requirement to subsidise the provision of some services.
- 9.3 The rationale for, and costs associated with, the provision or removal of any subsidy will be better evidenced.
- 9.4 The proposed transitional arrangements will lead to under recovery of costs from some existing tenants during the transitional period, resulting in a loss of income, necessitating subsidy of the service provision.

10. PERSONNEL IMPLICATIONS

- 10.1 There will be resource implications for managing and administering the calculation and recovery of service charges based on actual costs.
- 10.2 Current service delivery will be affected if existing resources are unable to sustain the increased responsibilities. Any additional resources would be service charged to the tenants.

11. CONSULTATIONS

- 11.1 All responses from consultees have been incorporated in the report.

12. RECOMMENDATIONS

- 12.1 The Caerphilly Homes Task Group is asked to consider and give a view on the following recommendations which will be presented to Policy and resources Scrutiny Committee on the 18th July 2017:
- 12.2 The proposal to charge tenants of sheltered housing schemes the actual costs of providing them with services per scheme is approved.
- 12.3 The proposal to introduce transitional arrangements for two years, prior to review, and to cap service charges in line with the rent policy during the transitional period is approved.

13. REASONS FOR THE RECOMMENDATIONS

- 13.1 To comply with Welsh Government rent setting policy.
- 13.2 To provide a fair and transparent system to tenants.
- 13.3 To provide assistance to those tenants most affected by any increase in charges while they adjust to the changes.

14. STATUTORY POWER

- 14.1 Housing Act 1985
- 14.2 Landlord & Tenant Act 1985

Author: Fiona Wilkins, Public Sector Housing Manager
Angela Hiscox, Older Persons Housing Manager

Consultees: Christina HARRY, Corporate Director Communities
Councillor David Poole, Leader of the Council
Councillor Lisa Phipps, Cabinet Member for Homes and Places
Shaun Couzens, Chief Housing Officer
Stephen R Harris, Interim Head of Corporate Finance
Nicole Scammel, Acting Director of Corporate Services S151
Lesley Allen, Principal Accountant
Karen Newton, Finance Officer
Todd Rawson, Solicitor
Sandra Isaacs, Rents Manager
Mandy Betts, Tenant and Community Involvement Manager
Debbie Bishop, Area Housing Manager

Julie Reynolds, Area Housing Manager
Karen James, Neighbourhood Housing Manager
Tracy Lundy, Neighbourhood Housing Manager
Alyson Colman, Senior Sheltered Housing Team Leader



CAERPHILLY HOMES TASK GROUP – 6TH JULY 2017

SUBJECT: HOUSING REVENUE ACCOUNT OUTTURN 2016/2017

REPORT BY: ACTING DIRECTOR OF CORPORATE SERVICES & SECTION 151 OFFICER

1. PURPOSE OF REPORT

- 1.1 To inform members of the outturn expenditure for the Housing Revenue Account (HRA) for the 2016/17 financial year.

2. SUMMARY

- 2.1 Members will be aware of the distinction between the HRA, which is funded by rental income received from council tenants, and General Fund Housing and Private Housing, which fall under the General Fund and is funded via the Council taxpayer. Although there is a clear separation of these funds, the majority of council tenants rent is funded from housing benefits which is derived from the tax payers purse and therefore value for money must always be sought.
- 2.2 The report outlines the final outturn for the HRA based upon the expenditure and income for the full financial year.
- 2.3 The HRA budget for 2016/17 was £47.3m which mainly includes £16m of salaries, £7.9m of capital financing charges, £7.9m of response repairs, and £15.6m of revenue contributions to fund the WHQS programme. The underspend in 2016/17 totalled £3.98m and the main reason for the underspend is detailed below.

3. LINKS TO STRATEGY

- 3.1 The content of the report is in accordance with the budget strategy agreed by Council at its meeting of 24th February 2016. Cabinet approved the 2016/17 Housing Revenue Account on the 3rd February 2016.
- 3.2 Budget management itself is in accordance with the Corporate theme of Delivering the Strategies.
- 3.3 The Wellbeing of Future Generations Act 2015 sets out the following wellbeing goals which link with the aims of this report:
- A sustainable Wales
 - A prosperous Wales
 - A healthier Wales
 - A more equal Wales
 - A Wales of cohesive communities
 - A Wales of vibrant culture and thriving Welsh language
 - A globally responsible Wales.

4. THE REPORT

4.1 Introduction

4.1.1 The following paragraphs highlight the major budget variances.

4.2 HRA (£3.98m underspend)

4.2.1 The HRA outturn was a £3.98m under-spend, which represents 8% of the total HRA budget. The main variances are summarised below and full details are provided in Appendix 1.

4.3 Salaries & Mileage (£180k underspend)

4.3.1 Salaries and associated costs within the HRA generated savings of some £180k, which represents around 2% of the total salary budget. There are a variety of reasons for this given the volume of staff, but the main causes are staff turnover of £448k, which includes savings such as long term sickness, opted out pension savings and vacant posts, offset by an overspend within the Housing Response Operations team of 198k which also includes staff turnover to address the increase in work experienced during the year, particularly in relation to WHQS related elements. The HRO team installed approximately 140 kitchen and bathrooms, over 80 rewires, 139 heating installations and 469 IG doors to support the WHQS programme. Offsetting the salary saving is a £69k overspend for other salary related budgets such as mileage allowances and agency staff.

4.4 Capital Financing charges (£366k underspend)

4.4.1 This underspend relates to a slightly lower interest rate than projected, which resulted in lower interest charges on the HRA debt.

4.5 Service Specific Related and Office Related (£1.6m underspend)

4.5.1 Non pay related budgets (which include office running costs, one-off projects and tenant related expenditure) have spent £1.6m less than budgeted. There are numerous variances within this category but an example of some of the savings are, Bad Debt Provision (£280k), provision for office relocation (£19k), DHP top up (£100k), Utility charges (£88k), Central Recharges and SLA's (£58k), IT systems and equipment (£74k), Projects (£136k), Local Employment Fund (£45k), Training (£14k), Energy Performance certificates (£17k), Decoration Allowances (£33k) and security of void properties (£13k).

4.6 Building Maintenance (£1.9m under-spend)

4.6.1 The HRA is utilised to fund the maintenance of the public housing stock which is undertaken by the Housing Repair Operations team.

4.6.2 Response Repairs sub accounts (£553k underspend) - In previous years this category would include the cost of response repairs which was charged via the Building Maintenance DLO. However, due to the merger of the DLO with the HRA, there is now an allocated budget for the Housing Repairs Operations (HRO). These costs are now split over salaries and non pay elements (as staff and materials are charged direct to the HRA) and are therefore shown elsewhere in this report. However, as part of the merger some budgets were streamlined more effectively to fit with the HRO service which included the Non-DLO budget which is typically used to contract works out that the HRO are unable to complete. This budget has underspent by £667k and is as a result of more work being undertaken in-house and the externally contracted work being controlled more efficiently within the in house workforce in lieu of appointing external contractors on a framework arrangement. This has been offset by an overspend on damp proofing works of some £168k. Further savings of £54k have also been achieved on asbestos surveys where the budget incorporated an element for planned programmes. This is now charged directly to the WHQS programme.

- 4.6.3 Revenue Projects (£579k under-spend) – this category mainly includes budgets that fall outside of the other budgets remits (i.e. not planned, cyclical or in house responsive). The under-spend mainly relates to the contingency budget (£258k) where a small provision is set each year for any unforeseen repairs. Projects for sheltered complexes have underspent by £147k and the infrastructure works budget of £128k has not been fully utilised this year, as a consequence of work being picked up in the WHQS Programme.
- 4.6.4 Planned Cyclical (£775k under-spend) – this relates to costs associated with our statutory servicing and maintenance obligations, e.g. heating, electrical, and legionella testing. Underspends in this area relate to Alarm & Light Servicing (£101k), Gas & solid fuel remedial works (£634k), Gas & Solid Fuel Servicing (£75k), Fire safety doors (£73k), Legionella testing (£9k), and electrical testing (£35k). There were also some overspends in Fire Safety Equipment Servicing for Complexes (£11k) and Lift repairs (£150k) that reduced the overall underspend. Whilst our statutory obligations continue to be met, the underspends are partly due to works being completed under the WHQS Programme and revised contractual arrangements.
- 4.6.5 As part of the merger of the Building Maintenance DLO with the HRA, the WHQS holding account was set up to monitor the in house workforce costs that would be recharged to the WHQS capital programme. A budget of £8.8m was allocated in 2016/17 along with an income recharge to the capital programme so that the HRA had a nil cost. The same principle applied to the WHQS management team responsible for delivery of the WHQS programme where £2.1m budget was allocated with an associated income recharge to capital.
- 4.6.6 The in house workforce for WHQS overspent its budget by some £900k (10%) and the WHQS Delivery team costs overspent by £50k (2%). The in-house workforce completed 882 properties in 2016/17 of which 208 were catch up from the previous financial year and 183 were properties brought forward from 2017/18 in advance of the programme.

4.7 Revenue Contribution to Capital (RCCO) (nil variance)

- 4.7.1 The HRA allowed for some £13.5m of revenue contributions towards the WHQS programme (not including delivery fees which are covered in 4.6.7 above).
- 4.7.2 The total expenditure on the WHQS capital programme was £31.4m against a budget of £38.6m. The HRA RCCO was therefore fully utilised to fund this spend in addition to the £7.3m Major Repairs Allowance (MRA) from Welsh Government and £8.4m from HRA balances earmarked for WHQS. The remaining balance was the funding of the delivery team fees from the HRA of £2.1m.

4.8 HRA Working balances

- 4.8.1 Working balances at the beginning of 2016/17 stood at £20m. This has been reduced by the £8.4m funding required for the WHQS programme but has increased by the £3.9m underspend from the HRA this year. The total working balances as at the 1st April 2017 (unaudited) is therefore £15.6m. The majority of this funding is earmarked to fund the WHQS programme. To date no borrowing has been undertaken to fund the WHQS programme.

5. WELL-BEING OF FUTURE GENERATIONS

- 5.1 Effective financial management is a key element in ensuring that the well-being goals within the Well-being of Future Generations Act (Wales) 2016 are met.

6. EQUALITIES IMPLICATIONS

- 6.1 There are no potential equalities implications of this report and its recommendations on groups or individuals who fall under the categories identified in Section 6 of the Council's Strategic Equality Plan. There is no requirement for an Equalities Impact Assessment Questionnaire to be completed for this report.

7. FINANCIAL IMPLICATIONS

- 7.1 The overall underspend is some 8% of the total budget and whilst close monitoring is regularly carried out throughout the year, the scale of the HRA budget inevitably leads to variances throughout the year due to the large volume of staffing required to manage and operate the service, the reactive nature of the response repairs service, fluctuation in void properties and changes to interest rates to name but a few.
- 7.2 It is intended that the £3.98m underspend be earmarked towards the WHQS Programme and added to the HRA working balances where it will be utilised within the WHQS funding requirement for 2017/18.

8. PERSONNEL IMPLICATIONS

- 8.1 There are no personnel implications.

9. CONSULTATION

- 9.1 There are no consultation responses, which have not been reflected in this report.

10. RECOMMENDATIONS

- 10.1 Members are requested to note the contents of this report.

11. REASONS FOR THE RECOMMENDATIONS

- 11.1 To inform Members of the financial position of the Housing Revenue Account.

12. STATUTORY POWER

- 12.1 Local Government Acts 1972 and 2003 and the Councils Financial Regulations.

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Nicole Scammell - Acting Director of Corporate Services & Section 151 Officer
Christina Harray – Corporate Director Communities
Shaun Couzens – Chief Housing Officer
Fiona Wilkins - Public Sector Housing Manager
Paul Smythe – Housing Repairs Operations Manager
Stephen Harris – Acting Head of Corporate Finance
Marcus Lloyd – WHQS Infrastructure and Strategy Manager

Appendices

Appendix 1 HRA financial plan outturn 2016/17

| HOUSING | Page | Revised Budget | Projected Outturn | Variance |
|--|------|-----------------------|--------------------------|------------------|
| | No | 2016/2017 | 2016/2017 | 2016/2017 |
| <u>HOUSING REVENUE ACCOUNT</u> | | £ | £ | £ |
| <u>SUMMARY</u> | | | | |
| GENERAL MANAGEMENT | | 911,406 | 555,459 | 355,947 |
| CAPITAL FINANCING | | 7,919,873 | 7,553,311 | 366,562 |
| CENTRAL RECHARGES | | 2,178,519 | 2,147,811 | 30,708 |
| STRATEGY AND PERFORMANCE | | 1,498,870 | 1,243,219 | 255,651 |
| PUBLIC SECTOR HOUSING | | 5,238,583 | 4,431,395 | 807,188 |
| SUPPORTED HOUSING | | 0 | 0 | 0 |
| BUILDING MAINTENANCE SERVICES | | 29,523,645 | 27,306,555 | 2,217,090 |
| GROSS EXPENDITURE | | 47,270,895 | 43,237,750 | 4,033,145 |
| INCOME | | (47,270,895) | (47,214,155) | (56,740) |
| (SURPLUS)/DEFICIT CONTRIBUTION (TO)/FROM WORKING BALANCES | | (0) | (3,976,405) | 3,976,405 |
| <u>HOUSING REVENUE ACCOUNT</u> | | £ | £ | £ |
| <u>GENERAL MANAGEMENT</u> | | 911,406 | 555,459 | 355,947 |
| <u>CAPITAL FINANCING COSTS</u> | | | | |
| Interest Charge | | 5,621,634 | 5,253,530 | 368,104 |
| Principal | | 2,332,190 | 2,330,231 | 1,959 |
| Debt Management | | 23,730 | 27,231 | -3,501 |
| Resheduling Discount | | (57,681) | (57,681) | 0 |
| EXPENDITURE TO HRA SUMMARY | | 7,919,873 | 7,553,311 | 366,562 |
| <u>CENTRAL RECHARGES</u> | | | | |
| Central Recharges | | 1,736,652 | 1,705,944 | 30,708 |
| Grounds Maintenance recharge to HRA | | 441,867 | 441,867 | 0 |
| EXPENDITURE TO HRA SUMMARY | | 2,178,519 | 2,147,811 | 30,708 |

| <u>HOUSING REVENUE ACCOUNT</u> | | £ | £ | £ |
|---------------------------------------|--|------------------|------------------|----------------|
| STRATEGY & PERFORMANCE | | 85,169 | 22,300 | 62,869 |
| PERFORMANCE DEVELOPMENT | | 623,238 | 504,386 | 118,852 |
| COMMUNICATIONS & ENGAGEMENT | | 96,867 | 89,993 | 6,874 |
| TRANSFORMING LIVES & COMMUNITIES | | 693,596 | 626,540 | 67,056 |
| EXPENDITURE TO HRA SUMMARY | | 1,498,870 | 1,243,219 | 255,651 |
| <u>HOUSING REVENUE ACCOUNT</u> | | | £ | £ |
| <u>PUBLIC SECTOR HOUSING</u> | | | | |
| Landlord General | | 168,457 | 140,239 | 28,218 |
| Sheltered Accommodation | | 1,434,092 | 1,216,875 | 217,217 |
| Holly Road Community support | | 1,866 | 3,416 | -1,550 |
| Lower Rhymney AHO | | 22,135 | (2,732) | 24,867 |
| Eastern Valley AHO | | 642,690 | 568,006 | 74,684 |
| Upper Rhymney AHO | | 776,535 | 710,909 | 65,626 |
| Gilfach NHO | | 0 | 0 | 0 |
| Lansbury Park NHO | | 332,579 | 281,898 | 50,681 |
| Graig Y Rhacca NHO | | 270,314 | 222,756 | 47,558 |
| Allocations | | 141,285 | 130,351 | 10,934 |
| TENANTS & COMMUNITIES INVOLVEMENT | | 474,813 | 347,588 | 127,225 |
| LEASEHOLDERS MANAGEMENT | | 49,038 | 55,044 | -6,006 |
| Tenancy Enforcement | | 271,266 | 247,043 | 24,223 |
| Rents | | 697,844 | 548,140 | 149,704 |
| Community Wardens | | (44,329) | (38,138) | -6,191 |
| EXPENDITURE TO HRA SUMMARY | | 5,238,583 | 4,431,395 | 807,188 |

| <u>HOUSING REVENUE ACCOUNT</u> | | | £ | £ |
|---|--|-------------------|-------------------|------------------|
| <u>SUPPORTED HOUSING</u> | | | | |
| Dispersed Alarms | | 0 | 0 | 0 |
| Telecare Centre | | 0 | 0 | 0 |
| Ty Croeso Hostel | | 0 | 0 | 0 |
| EXPENDITURE TO HRA SUMMARY | | 0 | 0 | 0 |
| <u>HOUSING REVENUE ACCOUNT</u> | | | £ | £ |
| <u>RESPONSE REPAIRS & MAINTENANCE</u> | | | | |
| Employee Expenses net of recharges | | 1,325,382 | 1,239,347 | 86,035 |
| Repairs & Maintenance on Housing Stock | | | | |
| Responsive Repairs | | 7,977,713 | 7,742,068 | 235,645 |
| Revenue Contribution to Capital - WHQS Programme | | 15,615,928 | 15,656,537 | -40,609 |
| Group/Planned Repairs (priorities 5 & 8) | | 0 | 0 | 0 |
| Void Repairs (priority 6) | | 0 | 0 | 0 |
| Revenue Projects | | 2,234,000 | 1,101,599 | 1,132,401 |
| Planned Cyclical | | 2,176,000 | 1,400,628 | 775,372 |
| Planned Programme | | 0 | (2,614) | 2,614 |
| | | 28,003,641 | 25,898,218 | 2,105,423 |
| Transport Related | | 25,270 | 16,208 | 9,062 |
| Supplies & Services | | 169,352 | 152,782 | 16,570 |
| EXPENDITURE TO HRA SUMMARY | | 29,523,645 | 27,306,555 | 2,217,090 |

| <u>HOUSING REVENUE ACCOUNT</u> | | | £ | £ |
|---|---------------------|---------------------|-----------------|---|
| <u>INCOME</u> | | | | |
| <u>Rents - Dwelling</u> | | | | |
| Gross Rent - Dwellings | (40,682,689) | (41,464,552) | 781,863 | |
| Gross rent - Sheltered | (4,530,468) | (3,710,485) | -819,983 | |
| Gross Rent - Hostel | 0 | 0 | 0 | |
| Voids - General Needs Dwelling/Sheltered | 600,000 | 675,284 | -75,284 | |
| Voids - Hostel | 0 | 0 | 0 | |
| Net Rent | (44,613,157) | (44,499,753) | -113,404 | |
| <u>Rents - Other</u> | | | | |
| Garages | (360,120) | (369,249) | 9,129 | |
| Garage Voids | 144,354 | 145,668 | -1,314 | |
| Shop Rental | (58,250) | (68,459) | 10,209 | |
| | (274,016) | (292,040) | 18,024 | |
| <u>Service Charges</u> | | | | |
| Sheltered - Service Charges | (1,421,134) | (1,315,078) | -106,056 | |
| Sheltered - Heating & Lighting | (158,230) | (197,172) | 38,942 | |
| Sheltered & Dispersed- Alarms | 0 | 0 | 0 | |
| Catering Recharge - Sheltered Accommodation | (53,657) | (39,552) | -14,105 | |
| Voids Schedule Water | 51,022 | 61,899 | -10,877 | |
| Non Scheduled Water Rates | (47,899) | (43,178) | -4,721 | |
| Welsh Water Commission | (705,624) | (703,297) | -2,327 | |
| Leaseholder - Service Charges | (10,000) | 1,661 | -11,661 | |
| | (2,345,522) | (2,234,717) | -110,805 | |
| <u>Government Subsidies</u> | | | | |
| Housing Subsidy | 0 | 0 | 0 | |
| | 0 | 0 | 0 | |
| <u>Interest Receivable</u> | | | | |
| Mortgage Interest | (1,200) | (523) | -677 | |
| Investment Income | (7,000) | (172,177) | 165,177 | |
| | (8,200) | (172,700) | 164,500 | |
| <u>Miscellaneous</u> | | | | |
| Miscellaneous | 0 | 0 | 0 | |
| Private Alarms | 0 | 0 | 0 | |
| Ground Rent | (30,000) | (14,945) | -15,055 | |
| | (30,000) | (14,945) | -15,055 | |
| INCOME TO HRA SUMMARY | | | | |
| | (47,270,895) | (47,214,155) | -56,740 | |



CAERPHILLY HOMES TASK GROUP – 6TH JULY 2017

SUBJECT: WELL BEING OBJECTIVE WO5 – INVESTMENT IN COUNCIL HOMES TO TRANSFORM LIVES AND COMMUNITIES

REPORT BY: CORPORATE DIRECTOR - COMMUNITIES

1. PURPOSE OF REPORT

- 1.1 To update progress against Well Being Objective (WO5) – Investment in Council homes to transform lives and communities for 2016/17.

2. SUMMARY

- 2.1 It is acknowledged that good quality, well managed homes in safe and attractive communities contributes to tenants' health, education and wellbeing. This report covers the period April 2016 to March 2017 and looks at the contribution that Caerphilly Homes has made to WO5 as part of its major investment programme to bring the council's housing stock up the Welsh Housing Quality Standard by 2020. Such an investment has also been used to target support for local businesses, training, employment and the local economy as a whole.
- 2.2 The internal works have achieved 2171 completions against a target of 2352 (92%). The external completions have achieved 921 completions against a target of 3395 (27%). The total number of properties that are fully compliant with WHQS for 2016/17 stands at 270.
- 2.3 Although some progress has been made in relation to the completion of external works, this remains significantly behind programme and requires further improvements to be made as a matter of urgency.
- 2.4 Works in relation to energy efficiency and adaptations to meet tenants specific needs have progressed well during the year.
- 2.5 A number of 'core' community benefits have been delivered.
- 2.6 There has been limited progress in relation to the environmental programme.
- 2.7 Tenant satisfaction levels remain high with extremely low levels of complaints.
- 2.8 The programme remains challenging, but improved progress has been made and new arrangements introduced to ensure momentum is improved to deliver the standard by 2020. During the period covered by this report it is assessed that achievement against the Well Being Objective WO5 is partially successful.

3. LINKS TO STRATEGY

- 3.1 The delivery of the Welsh Housing Quality Standard (WHQS) programme is coterminous with the aims of the Wellbeing of Future Generations (Wales) Act 2015 which requires public bodies to work towards a shared vision comprising 7 goals and adopt the 5 “Ways of Working”. The goals and the 5 Ways of Working will underpin the delivery of the programme and include planning and acting for the long term, integration, involvement, collaboration and prevention.
- 3.2 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. It is a Welsh Government requirement that the WHQS is achieved by 2020.
- 3.3 The Caerphilly Delivers - Single Integrated Plan 2013-2017 has a priority to “improve standards of housing and communities, giving appropriate access to services across the County Borough”.

4. THE REPORT

Background

- 4.1 The Council has a housing stock of 10,822 properties comprising approximately 13,000 tenants and is investing over £200m in bringing all homes up to the Welsh Housing Quality Standard by 2020. Since embarking on the delivery of the programme, it has always been our intention to utilise this investment, not just to improve homes, but to also transform peoples lives and the communities in which they live.
- 4.2 The approach taken was in accordance with W.G. guidance and included consultation with tenants, which resulted in the programme being delivered by undertaking internal and external works separately and in different communities. The programme set out the number of properties that were required to be completed within each community for each year, in order to achieve the standard by 2020.
- 4.3 Due to the scale of the project, work was to be undertaken by the in-house workforce and external contractors and was structured to provide opportunities for local business in order to maximise support for the local economy. In addition, the contracts included core requirements for the contractors to provide community benefits, particularly in relation to providing opportunities for work placements, training, apprenticeships and jobs.
- 4.4 An environmental programme was also agreed in order to meet the WHQS requirements that properties be located in attractive and safe environments. This is programmed to be delivered over the next three years, with the work predominantly being undertaken by various in-house services including Housing Repair Operations Team, Highways Operations Group and Grounds Maintenance. Resources are also being used across Caerphilly Homes to assist in identifying projects through local knowledge, tenant and member enquiries, as well as consultation with various community groups.
- 4.5 The WHQS requires properties to meet the specific needs of the household which aims to not only assist with individuals health and wellbeing, but also helps to reduce accidents within the home. To deliver on this requirement a number of Occupational Therapists have been appointed and work alongside our surveyors to provide a needs assessment. This has resulted in 430 specific adaptations being made to tenants homes to help with any medical or physical conditions they may have.
- 4.6 To date the WHQS Team have delivered internal improvements to 5,874 properties, which leaves a total of 4,955 required to be completed over the next three years, which have been broken down as follows:-

| | | |
|---------|---|-------|
| 2017/18 | - | 2,505 |
| 2018/19 | - | 1,754 |
| 2019/20 | - | 696 |

- 4.7 With regards to external works, at the end of 2016/17 only 1,320 properties have been completed. Whilst this is significantly behind the numbers initially programmed, there has been a significant improvement recently following the introduction of new contractual arrangements. In order to deliver the standard over the remaining years, the following profile has been established:-

| | | |
|---------|---|-------|
| 2017/18 | - | 4,675 |
| 2018/19 | - | 2,579 |
| 2019/20 | - | 2,001 |

- 4.8 It is accepted that the external works programme is challenging, but with changes to the contractual arrangements, improvements made in surveying, efficiencies introduced through mobile working and increased capacity, the target of 2020 is still considered to be deliverable.

Current Position

- 4.9 Work has progressed during 2016/17 based around the amended WHQS programme approved by Cabinet in February 2016 plus the subsequent slippage that resulted at year end. Specific details in relation to progress and performance are highlighted further within the report and the attached appendix.
- 4.10 Internal works completions to the end of Q4 was 2171 properties against a target of 2352. This provides a completion rate of 92% against target for the financial year. There are a number of reasons why there is currently a slight under achievement. Some of this slippage is as a result of "no access". This is where staff and/or contractors have failed to gain access to properties to undertake works. There are numerous reasons why this may result such as ill health of tenants, tenants not prepared to engage, programme time slot does not suit tenant. In order to improve access, tenants are offered appointments and these are now confirmed with a letter and text messages, with a further message sent nearer the appointment date as a reminder. As tenants are able to 'opt-out' of the WHQS works unless health and safety is an issue, continued no access will then recorded as an acceptable fail. The property will then benefit from the WHQS works when there is a change of tenancy or if there is a change in other circumstances. There have also been some issues with external contractors' performance where they have not achieved the targets set and this is currently being managed through tighter contractual control and increased resources being provided by the contractors concerned. It should be noted that the in-house DLO performed exceptionally well during the year completing 183 properties from the 2017/18 programme early. At present the internal works are projecting to be completed by the 2020 deadline, with only a small number of properties required to be completed in the financial year.
- 4.11 External works completions are currently lagging well behind target. To the end of Q4 only 921 properties have been completed against a target of 3395. This does compare favourably when compared to the previous year, 2015/16, where only 299 completions were recorded, but remains an area of concern. The main reason for this level of performance has been that the Lower Rhymney Valley (LRV) did not have contractual arrangements in place to undertake external works. It was originally envisaged that this work would be undertaken by the in-house DLO. However, resources were reallocated to Rowan Place and are now being targeted at the Sheltered Housing schemes. Alternate contract arrangements are now in place and available to utilise from April 2017. A number of tender packages under this new contract arrangement have recently been put out to tender and currently work for 1,800 properties are ongoing.

- 4.12 In the East and Upper Rhymney Valley area external works contracts have not progressed as quickly as anticipated. This has predominantly been the result of limited contractor availability within the small lots process in the East and the framework arrangement in the North. The arrangement now in place for the LRV is a more flexible process with contingency built in to allow its use in the other areas if needed. It is anticipated that this will assist in addressing the backlog moving forward as it will provide a larger pool of contractors. The external works programme will be given priority for 2017/18 which is reflected in the forward work programme.
- 4.13 It should be noted that there have been significant works undertaken in relation to external wall insulation (EWI) to the vast majority of the Council's non-traditional housing stock. During 2016/17 a further 229 properties have benefited from installation of EWI at Pontllytyn, Gilfach and Gelligaer. These works transform the appearance of properties as well as assisting to address fuel poverty and reduce tenants energy bills. Recently further EWI works have commenced at Lansbury Park. The initial phase 1 works is targeting 320 council owned properties with phase 2 to follow improving the remainder of the council owned properties at Lansbury Park (188no).
- 4.14 Whilst the slippage situation needs to be minimised it is unlikely to be completely eradicated as there will inevitably be issues affecting individual properties and as far as practicable consideration is given to the tenants when work is planned. The slippage in relation to the internal works is primarily due to access issues and the productivity of the contractors, but this has been estimated and projected forward and there is capacity within the programme to accommodate this. Slippage in relation to external works is mainly due to capacity and arrangements have now been put in place to address this.
- 4.15 The Housing Revenue Account (HRA) garage programme was planned to be complete by April 2017. Unfortunately in order to comply with procurement legislation, new contract arrangements have had to be put in place to avoid potential claims of disaggregating the contract, which will delay completion until 2018 which is well within the overall programme timeline.
- 4.16 Survey work commenced in relation to sheltered housing schemes. Good progress has been made in this area since the decision was made to undertake these works in-house utilising a full property approach. A programme of works has been agreed and issued to the tenants within the schemes and individual scheme meetings have been held with those included within the 2017/18 programme to raise awareness of the extent of works and provide tenants with the opportunity to raise any concerns they may have. Physical works to the first two schemes commenced in April 2017. Members will be aware that agreement was reached to look at the remodelling of 6 sheltered schemes which may be completed after the 2020 deadline, due to the fact that they are deemed not to be fit for purpose and cannot be made WHQS compliant.
- 4.17 The Environmental Programme has now made some progress with over 100 small local schemes spread across the borough being approved and a number have already been completed with many more in progress. Tenant consultations are ongoing to identify further schemes which include various tenant & resident groups, community groups and partnerships. The programme has been developed to deliver the environmental improvements over the next three years
- 4.18 Based on the performance during 2016/17 along with a further re-profiling exercise that has been undertaken (previously reported to CHTG on 16th February 2017, Policy and Resource Scrutiny committee on 28th February 2017 and approved by Cabinet on 15th March 2017), there remains sufficient flexibility in the programme to achieve completion by March 2020.
- 4.19 Customer satisfaction levels remain high with an average of 90% of tenants being satisfied with the completed works undertaken to their homes against a target of 80%. In relation to standards met this is still high at 85% although it is slightly below the target of 90%. Overall

performance can be considered good. There have been some recent organisational issues with one of the contractors, which has resulted in complaints on the timescales taken to complete the works and the lack of customer care by some of their workforce. This is currently being addressed in line with improved management control and the terms of the contract.

- 4.20 Compliments/complaints are being regularly monitored. During 2016/17 the WHQS team have received 22 stage 1 complaints and 8 stage 2 complaints. In addition there have also been 11 cases of compliments/praise received in writing from tenants. This identifies that there is a balance between views and it should be noted that generally tenants are more likely to raise a concern than provide written praise. This all needs to be balanced against the number of property completions during 2016/17 so far which stands at 2171 properties for internal works and 921 for external works. Given this volume of work the number of complaints received is considered to be extremely low.
- 4.21 The Council made a commitment in 2012 at the outset of the programme to ensure that its investment in homes delivered more than simply new kitchens and bathrooms. Its ambition to transform homes, lives and communities has been realised through adaptations to meet the specific needs of tenants and by incorporating community benefit obligations as a core requirement into all internal works contracts and its supply partner contract. During 2016/17 430 homes were adapted to meet the specific needs of the household resulting in a total of 768 homes being adapted to date. In addition, the inclusion of community benefits into WHQS contracts has delivered 69 permanent full time opportunities with contractors and 106 full time opportunities within the Council. 20 apprenticeships have been created with contractors and 43 apprenticeships within the Council. As a result of linking the delivery of work placements for unemployed people aged 16+ with the Welsh Government's LIFT programme which is delivered in partnership with Communities First, 46 work placements have been delivered since the start of the programme. Further benefits relating to the creation of community funds to support local activities, attendance at community events, sponsorship of Caerphilly Homes Awards and projects linked with local schools have also been delivered.
- 4.22 As mentioned previously, 229 properties benefitted from external wall insulation which contributes towards addressing fuel poverty as well as improving the internal and external environment.

5. WELL-BEING OF FUTURE GENERATIONS

- 5.1 The delivery of the WHQS improvement programme is coterminous with the aims of the wellbeing of Future Generations (Wales) act 2015, in particular:-
- **Long Term:** the report includes the continued investment and performance to achieve WHQS by 2020. This investment provides long term improvements to the property, community and to the tenants well being.
 - **Integration:** The programme looks to integrate property and environmental improvements that will benefit and transform lives and communities throughout the borough. It further brings together a variety of stakeholders to deliver long term sustainable benefits for lives and communities.
 - **Involvement:** Tenants and local residents are being consulted on the proposed property improvements, environmental works along with various initiatives that are part of the WHQS programme delivery.
 - **Collaboration:** The programme delivery is focussed on internal collaboration, partnerships with suppliers and contractors, joint working with the community and various groups. The delivery of community benefits and tenant engagement by all involved with the WHQS programme is a key focus and is clearly demonstrable within its delivery.

- **Prevention:** The works to improve lives and communities will help tackle local unemployment. It will further improve the look and feel of the environment and help prevent anti social behaviour.

6. EQUALITIES IMPLICATIONS

- 6.1 An Equalities Impact Assessment is not required as the report is for information.

7. FINANCIAL IMPLICATIONS

- 7.1 The Capital Programme for 2016/17 was £38.6M. The outturn capital expenditure was £31.4M resulting in an under-spend of approximately £7M. The under-spend will be utilised to fund the future years programme.
- 7.2 Officers will continue to seek alternative funding to support energy efficiency schemes for the Council's housing stock, as this will supplement the current investment being utilised to bring the stock up to the WHQS.

8. PERSONNEL IMPLICATIONS

- 8.1 The timetable pressure is increasing and there has to be the capacity within the staff resources to cope with the volume of work. Staff movement and recruitment difficulties remain a risk to the programme and have continued to be an issue during 2016/17.
- 8.2 Continued close management and monitoring of performance of the programme is essential to ensure that its delivery is not compromised in any way. There will be an increase in workload for the in-house team due to the sheltered housing schemes commencing and additional resources will be required to ensure performance in achieving the objective is maintained.

9. CONSULTATIONS

- 9.1 All responses from consultations have been incorporated in the report

10. RECOMMENDATIONS

- 10.1 Members are asked to note the content of the report and to agree or challenge the judgement of partially successful at year end.

11. REASONS FOR THE RECOMMENDATIONS

- 11.1 To advise Members of the progress made in 2016/17, in delivering the improvement objective and to gain agreement on the judgement of the service as to progress made.

12. STATUTORY POWER

- 12.1 Housing Acts 1985, 1996, 2004, Local Government Measures 2009 and the Well-being of Future Generations (Wales) Act 2015.

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Consultees: Cllr L Phipps - Cabinet Member for Homes and Places
Cllr B Jones - Deputy Leader and Cabinet Member for Finance,
Performance and Governance
Christina HARRY - Corporate Director – Communities
Nicole Scammell - Acting Director of Corporate Services & S151 Officer
Shaun Couzens - Chief Housing Officer
Ros Roberts - Performance Manager
Ian Raymond - Performance Management Officer

Background Papers: Welsh Housing Quality Standard (WHQS)
The Council's Local Housing Strategy Housing
The Caerphilly Delivers - Single Integrated Plan 2013-2017

Appendices:
Appendix 1 - WO5 Investment in Council homes to transform lives and communities

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2016/17 Wellbeing Objective

WO5 - Investment in Council homes to transform lives and communities

Outcomes:

The Welsh Government and this Council believes that everyone in Wales should have the opportunity to live in a good quality home within a safe and secure community. To help achieve this, the physical standard and condition of existing housing must be improved and maintained to the Welsh Housing Quality Standard (WHQS).

The standard has seven main parts:

- In a good state of repair.
- Safe and secure.
- Adequately heated, fuel efficient and well insulated.
- Contain up-to-date kitchens and bathrooms.
- Well managed (for rented housing).
- Are located in attractive and safe environments.
- Meet and suit the specific requirements of the household (as far as reasonable and practicably possible). For example, catering for specific disabilities.

We will aim to ensure all council homes meet the WHQS, helping to improve the quality of life for the people who live in those homes. The programme of work will create long-term arrangements, which will help sustain local jobs, offer skills development and training opportunities, and deliver wider community benefits.

By 2020, we want our communities to know:

- We delivered the best quality home improvements scheme to our tenants.
- We did it with them and not to them.
- Their homes created real jobs in our communities.
- We delivered the whole project on time and in budget

These ambitions can only be achieved with the entire Council and tenants and other key stakeholders working together and we are confident that with their support this programme will transform council homes, the lives of our citizens and our communities.

2016/17 Wellbeing Objective

WO5 - Investment in Council homes to transform lives and communities

For the year 2016/17 the overall level of progress to date on this objective is deemed to be **partially successful**.

Throughout the following report pages, there is reference to relevant performance, actions and proposals to manage, monitor and improve performance and outputs.

There has been steady progress across all elements of this objective, which has led to the following highlights:

- * Overall customer satisfaction levels are at 90%.
- * Overall satisfaction levels against standards met are at 85%.
- * Expenditure is currently £31.4M against the budget of £38.6M for the year 2016/17
- * There have been 430 properties in 2016/17 that have had specific tenant need adaptations against a total of 2171 properties receiving completed internal works (~20% of targeted properties receiving adaptations).
- * External Wall Insulation (EWI) has been completed to 229 properties.
- * Internal and external works surveying is now ahead of programme with surveys for 2017/18 works already well underway.
- * Internal works completions are progressing well, whilst external works needs to improve.
- * Rowan Place works are substantially complete to properties with finishing works and an environmental improvement scheme currently ongoing.
- * Lansbury Park external wall insulation works have recently commenced on site and will be ongoing into the next financial year (phase 1 = 320 and phase 2 =188 properties).
- * Works to the garages are well advanced in the east area. New contract arrangements are being finalised to progress further works in the north and south of the borough.
- * Surveying work has commenced for the sheltered housing stock in readiness to commence improvements works from April 2017.

Key: The following Action RAG status, shows delivery to date as





| | |
|--|-------------------|
| | Un-successful |
| | Partly successful |
| | Fully successful |

WO5 - Investment in Council homes to transform lives and communities**Actions**

| Title | Comment | RAG | Overall Status | % Complete |
|--|---|-----|---------------------|------------|
| 1. Implement the environmental improvements to meet Part 6 of the standard of attractive and safe communities. | <p>Part 6 (WHQS 2008) states: All dwellings should be located in an environment to which residents can relate and in which they can be proud to live and all opportunities should be taken to make improvements to the immediate environment (within the property boundary) of individual dwellings and to the general environment.</p> <p>Safety and privacy of the property is being considered as part of the external works surveys and works undertaken to address any concerns noted in accordance with the WHQS requirements. Works have been slow to progress to date due to contract arrangements not being in place to undertake the external works throughout the borough. Alternative contract arrangements and contingency measures are currently being developed.</p> <p>The environmental programme is now commencing to look to improve the wider general environment. Again work in this area has been slow to commence. Some quick wins have been implemented such as new fences, walls, bollards, etc. have been installed at some locations.</p> <p>The Environmental Programme has now made some progress with over 100 small local schemes spread across the borough being approved and a number have already been completed with many more in progress. Tenant consultations are on-going to identify further schemes.</p> | ● | Partially Completed | 7 |
| 2. The continued delivery of the capital investment programme in respect of internal and external repairs and improvements | <p>Despite the delivery programme experiencing some slippage at the start of the year, work has progressed reasonably well during 2016/17 based around the amended WHQS programme approved by Cabinet in February 2016. Internal works are being well delivered and progressed, but, external works are somewhat slower in delivery pace and completions. Work profiles are continuously being monitored with delivery and progress periodically reported to the Caerphilly Homes Task Group (CHTG), P&R Scrutiny and Cabinet.</p> <p>During 2016/17: The number of property completions stands at 2171 for internal works and 921 for external works.</p> <p>Additionally, survey work has commenced in relation to sheltered housing schemes. Good progress has been made in this area since the decision was made to undertake these works in-house utilising a full property approach. Construction works to the first two schemes commenced in April 2017.</p> <p>Also during the year, the WHQS Team received 11 cases of compliments/praise received in writing from tenants and 22 stage 1 complaints and 8 stage 2 complaints. This identifies that there is a balance between views and it should be noted that generally, tenants are more likely to raise a concern than provide written praise. Given the volume and diversity of work being delivered the number of complaints received is considered to be extremely low. From the performance to date, and continuous review and consideration of the forward workload, a further stepped change is needed to improve the external work outputs. Work is on-going to put appropriate arrangements in place for 2017/18 and these improvements will ensure that the work and spend required to deliver the programme by March 2020 will be achieved.</p> | ● | In Progress | 60 |

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WO5 - Investment in Council homes to transform lives and communities**Actions**

| Title | Comment | RAG | Overall Status | % Complete |
|--|---|--|----------------|------------|
| 3. The continued pursuit of external funding opportunities to support energy improvement measures | During 2016/17 - 229 properties have benefited from installation of External Wall Insulation (EWI) at Pontlottyn, Gilfach and Gelligaer. These works transform the appearance of properties as well as assisting to address fuel-poverty and reduce tenants energy bills. Recently further EWI works have commenced at Lansbury Park. The initial phase 1 works is targeting 320 council owned properties with phase 2 to follow improving the remainder of the council owned properties at Lansbury Park (188no). A Warm Homes bid was unsuccessful during Q3. Further Warm Home bids and ECO funding opportunities will be progressed when they become available. |  | In Progress | 90 |
| 4. The understanding and importance of carrying out timely and sensitive adaptations that meet specific needs of certain individual households | Timely and sensitive adaptations are continually being identified and progressed as part of the internal and external works programme. During 16/17 - adaptations equate to 430 properties during the year against an internal completion figure of 2171. Which equates to approximately 20%. During the last financial year (2015-16) OT and surveying resources were increased to ensure tenants needs were identified and fully assessed. This work has continued during 2016-17. Further improvements in service delivery and efficiency are currently being implemented with the utilisation of mobile technology and an appointment process overseen by a dedicated planner. |  | Complete | 100 |
| 5. Adhere to the standards set out in the Charter for Trust. This applies to both the in house workforce and contractors | The Charter for Trust is a key document to provide tenants with confidence that the works to their homes will be undertaken with respect. This is measured via a customer satisfaction survey sent to each property on completion of the works. Currently the overall level for all contractors in relation to standards met is 85% which is slightly below the target of 90%. There are currently some minor variances in performance between the contractors with the in-house DLO performing slightly better than the external contractors. The in-house provider is achieving the target of 90%. Some external contractors are slightly below target, pulling the overall average down. There are on-going progress meetings with all contractors to try and further improve on the performance figures going forward. |  | Complete | 100 |
| 6. Achieve and maintain the high levels of tenant satisfaction with the work undertaken to their homes | A customer satisfaction survey is sent to all tenants on completion of works to their property. Currently the average target is being exceeded but there is scope for improvement in certain areas and with specific contractors. These concerns are actively being addressed. Current overall performance figures are 90% with only a concern with one contractors performance. On-going dialogue with this contractor is currently taking place to improve their performance. |  | Complete | 100 |

WO5 - Investment in Council homes to transform lives and communities**How much did we do?**

| Title | Actual | Target | Intervention | RAG | Result 12 months ago | Comment |
|---|---------|---------|--------------|-----|----------------------|--|
| Number of homes compliant with WHQS in respect of their external elements | 950.00 | 3395.00 | 3056.00 | | 299 | This years target includes an element of b/f slippage from previous year. This does compare favourably when compared to the previous year, 2015/16, where only 299 completions were recorded. The main reason for this level of performance has been that the lower Rhymney valley (LRV) did not have contractual arrangements in place to undertake external works. In addition there was a shortfall in contractor availability in both the north and east of the borough. The LRV contractor is now in place for commencement in April 2017 and also provides contingency to assist in other areas of the borough as and when needed. Further the DLO has been instructed to undertake external works to the sheltered schemes and private sector housing are assisting in delivering external works to leaseholder properties. |
| Number of homes compliant with WHQS in respect of their internal elements | 2171.00 | 2352.00 | 2117.00 | | 1415 | This years target includes an element of b/f slippage from previous year. Reasons why there is currently a slight under achievement include no access to tenants' properties and there have also been some issues with the performance of external contractors where they have not achieved the targets set. A new "No Access" procedure was introduced during 2016/17. This has identified that there have been 217 properties that tenants have failed to engage to allow works to progress. These properties have now been deferred to the end of the programme. |
| Number of homes in local authority ownership brought to WHQS as recorded on annual return to Welsh Government (The number of houses that have achieved WHQS standard in the year) | 270.00 | 1263.00 | 1010.00 | | 252 | This result is accumulative to date (provisional) - not yet fully validated by the service. Due to the way in which the programme is configured (internal and external works undertaken in different sequence) the compliance rate for whole property completion will not materialise until later in the programme. During 2017/18 there are 26 community areas where either internal or external works are planned and there have previously been WHQS improvements made i.e. the works are now overlapping. As such these community areas are planned to achieve full WHQS compliance by March 2018. This will further increase in the following years and achieve full compliance of all properties by 2020. |

WO5 - Investment in Council homes to transform lives and communities**How well did we do it?**

| Title | Actual | Target | Intervention | RAG | Result 12 months ago | Comment |
|--|--------|--------|--------------|-----|----------------------|---|
| Charter for Trust Standards - The Charter for Trust developed in consultation with tenants and staff sets out the standards that tenants can expect when work is being undertaken in their homes, which will be assessed by specific questions on the customer satisfaction survey | 85.00 | 90.00 | 83.00 | | 83 | Reasonable performance achieved. However, work is being undertaken with the contractors to ensure that performance in this area is improved. The Charter for Trust is key to ensuring tenants are at the centre of the successful delivery of the programme. This performance will be specifically targeted for action and improvement throughout the year within the monthly progress meetings undertaken with contractors. |

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Is anyone better off?

| Title | Actual | Target | Intervention | RAG | Result 12 months ago | Comment |
|---|--------|--------|--------------|-----|----------------------|--|
| Number of tenants whose homes have been adapted as part of the WHQS works to meet their specific needs | 430.00 | | | | 105 | This activity is dependent on the needs identified when delivering and progressing the WHQS programme. Therefore, no specific targets are set, as it is only from the surveys that you can identify if there are any specific tenant needs. If identified, these works are implemented. Recent records show for; 2013/14 = 120 2014/15 = 233 2015/16 = 105 and 2016/17 = 430 |
| The % of tenants whose homes have been improved internally through the WHQS programme are satisfied with the completed works (The percentage of tenants who's house meets the WHQS standard that are satisfied) | 90.00 | 80.00 | 72.00 | | 84 | Overall performance is good, with tenant expectations exceeding the targets set. This measure captures tenants views on completion of the works to their property. The tenants generally reflect their satisfaction with the overall approach to the whole delivery of the improvements along with the final product. |



CAERPHILLY HOMES TASK GROUP – 6TH JULY 2017

SUBJECT: YEAR END PERFORMANCE REPORT FOR CAERPHILLY HOMES

REPORT BY: CORPORATE DIRECTOR COMMUNITIES

1. PURPOSE OF REPORT

- 1.1 The purpose of this report is to provide members with an update on the performance of Caerphilly Homes during 2016/17, to set out the key service objectives for 2017/18 and highlight any potential challenges that may affect delivery of these objectives.

2. SUMMARY

- 2.1 This report provides members with an overview of the performance of Caerphilly Homes by section during 2016/17.
- 2.2 The report also sets out a range of objectives to be undertaken in 2017/18 that will deliver further service improvements and identifies a number of potential challenges that may affect delivery of these objectives.
- 2.3 The performance of Caerphilly Homes for 2016/17 is considered to be good overall, although, it is accepted that there are some aspects of the service which require improvement. In addition, a number of challenges have been identified that have resulted in action plans being developed, which have been incorporated into the 2017/18 service plan. The main challenge moving forward relates to our continued ability to provide a high quality service that meets the needs and aspirations of our service users, whilst continuing to satisfy medium term financial plan priorities and changing legislation. The service is regarded to be well placed to respond to this challenge.

3. LINKS TO STRATEGY

- 3.1 ***The Well Being of Future Generations (Wales) Act 2015*** contains 7 well-being goals. When making decisions the act requires public bodies in Wales, including local authorities, to take into account the impact they could have on people living their lives in the future.
- 3.2 ***Improving Lives and Communities: Homes in Wales (Welsh Government, 2010)*** which sets out the national context on meeting housing need, homelessness, and housing-related support services.
- 3.3 ***Caerphilly Delivers (Single Integrated Plan, 2013-2017): P2: "Improve standards of housing and communities, giving appropriate access to services across the county borough."***
- 3.4 ***Anti-Poverty Strategy (CCBC)*** which sets out a range of priorities to tackle poverty in the borough.

4. THE REPORT

4.1 Caerphilly Homes consists of four main sections:

1. Housing Repair Operations;
2. Private Sector Housing;
3. Public Sector Housing; and
4. Welsh Housing Quality Standard.

4.2 The Caerphilly Homes is responsible for providing good quality, well managed, affordable homes both in the public and private sector. The aim is to provide balanced communities of mixed tenure and homes that meet the specific needs of the household, as well as being well maintained and improved via various initiatives to achieve good standards of living.

4.3 As part of the corporate service improvement process, each year Caerphilly Homes undertakes a self-evaluation exercise. This exercise allows us to evaluate the performance of the service against seven pre-defined areas, and assists in identifying aspects of the service that require improvement together with any challenges facing the delivery of the service. The self-evaluation exercise informs the development of the service plan.

4.4 The performance of each section will be considered separately in turn in the following paragraphs:

Housing Repair Operations

4.5 The section provides a responsive repairs and maintenance service to the council's housing stock of 10,828 properties, completing approximately 30,000 repairs per annum, in addition to supporting the Welsh Housing Quality Standard (WHQS) section with both the internal and external capital investment programme. It consists of 175 members of staff (FTE), including multi-trade maintenance operatives, with an annual turnover of £8m. There is a further budget of some £5.5m, relating to planned and cyclical projects, utilising external contractors that support the in-house workforce with the service and repair of all heating & hot water systems, stair lift and hoist lifting equipment in addition to the statutory maintenance of 34 sheltered housing schemes.

4.6 Overall, the section continues to strive towards improving the way it delivers its services. Significant cost savings have been generated through improved productivity brought about by the extension of mobile working, the multi skilling of operatives, reducing the necessity to travel, and a reduction in administration and overhead costs. Repair performance and customer satisfaction levels have also remained high in comparison with the previous year (2015/16). See table under item 4.8.

Performance in 2016/17

4.7 Examples of achievements in 2016/17 include:

- In December 2016 the section was awarded the status of the Best Performing Authority in the UK for Building Maintenance by the Association of Public Services Excellence (APSE) Performance Networks.
- In the same Performance Network award ceremony, the section was also finalists in the Most Improved Performer in Building Maintenance, which is based on the number of improvements that had been made to various performance measures throughout the year including repair appointments, repair response targets, cost of providing the repairs service and customer satisfaction.
- In addition to providing the repairs and maintenance services, the section also supported the WHQS programme by completing over 138 kitchens replacements, 143 bathroom replacements, 84 electrical rewires, 139 central heating upgrades, 469 IG door replacements, 59 fibreglass flat roofs.

- Took responsibility for the management and monitoring of statutory maintenance services and established new contractual arrangements for their delivery.

Areas for improvement:

4.8 Areas that require improvement were identified as:

- The winter months can often create high levels of external repairs with the increased level of roof and chimney stack leaks along with the removal of cavity wall insulation to address problems of dampness. In order to increase resources, given that the number of extreme wet weather events is increasing, we have established a sub-contractor framework whereby external contractors can provide assistance to meet changes in demand.
- Improve performance and contract arrangements for statutory maintenance.
- Reduce the number of material collections from our supplier by reviewing van stocks to improve efficiency
- Introduced a text facility to provide tenants with confirmation of their repair being recorded and to provide a reminder for their agreed appointment.

| Key Performance Indicators | Previous Year 2016/17 | | Progress / Comments |
|---|-----------------------|--------------------------|--|
| | Target | Actual | |
| The average end of tenancy voids costs. | £4,500 | £7,430 | <p>2015/16 - £3,944.60 (However this cost was miss calculated as void clearances were included as a separate cost, where these should have been included to the actual void property).</p> <p>HRO completed 729 voids during 2016/17 and are now undertaking high numbers of WHQS elements on void properties which has significantly increased the costs. If one element is identified on the pre-inspection then all 4 are completed, i.e. kitchen, bathroom, electrical rewires central heating, plus the topping up loft insulation hence this has significantly increased the costs where the target will need to be adjusted to reflect this. These voids are then classified as being internally compliant with WHQS standards.</p> |
| Number of WHQS works completed by HRO by category of works. | N/a | 144 Internally compliant | <p>This number is broken down as follows: (2015/16 totals)</p> <ul style="list-style-type: none"> • 143 bathrooms; (93) • 138 kitchens; (98) • 84 rewires; (44) • 139 Central Heating Upgrades (new measure) • 469 IG Doors; (284) • 59 Fibreglass roofs; (28) <p>Increased WHQS works completed in 2016/17.</p> |
| Number of backlog repairs | N/a | 1,336 | Repairs are prioritised and allocated a |

| | | | |
|---|----------|-------------|---|
| pending at year end. | | | completion target, depending on the nature of the repair, ranging from 1-66 days. This means there will always be a continual work in progress backlog of pending repairs within appointment diaries, which increases and decreases throughout the year. (None outside target). |
| Number of confirmed complaints received. | N/a | 21 | This number represents complaints received on the numbers of repairs completed (27,605). These related to quality of service, standard of work and timeliness of undertaking the work. |
| Number of repairs carried out to tenant's homes. | N/a | 27,605 | This is a slight reduction from 2015/16 figures where 28,698 repairs carried out to tenants homes. This is due to improved weather conditions on the previous year and the possible impact of WHQS works. |
| % of repairs undertaken as appointments within specific categories(Qtly accum - Year to date) | 97% | 99.95 | 2015/16 - 95.32 Appointments offered to tenants have increased by 4.63%. |
| Average number of working days taken to complete a planned repair (08) | 66 | 51 | Defined as priority 8 = 66 days completion target. Increase level of planned works including WHQS has increased since 2015/16 where performance confirmed as 39.99 day. Target to be reduced for 2017/18. |
| Average number of working days taken to complete a routine repair | 25 | 10 | Defined as priority 3, 4 & 5 = 2, 25 & 50 days completion target. 2015/16 - 9.99. Target to be reduced for 2017/18. |
| Average number of working days taken to complete an emergency repair (02) | 1 | 0.11 | 2015/16 – 0.98. Improvement made on previous year. Defined as priority 2 = 1 day completion target. |
| Percentage of emergency jobs completed on time (within 24 hours) (02) | 100% | 100% | |
| Percentage of non emergency jobs not subject to call back/complaint (right first time) (03-05-08) | 98% | 98.43% | 2015/16 - 98.50%. |
| Percentage of planned repairs completed on time (08) | 90% | 84.96% | 2015/16 - 92.50%. Completion time reduced as a result of the volume of renewals carried out rather than repairs to contribute towards WHQS compliance. |
| Percentage of routine repairs completed on time (03/05) | 95% | 97.10% | 2015/16 – 96.26%. Improvement made on previous year. |
| Tenant Survey: % of customers satisfied with the Repairs Services they receive | 100% | 99.67% | 2015/16 – 100%. Satisfaction levels, although, not 100% still high based on 20% of customers surveyed. |
| Percentage of Materials Recycled | 80% | 86.5% | 2015/16 – 85.67%. Small improvement on previous year. |
| Total Fuel Used by the HRO fleet (Yrly) | £215,000 | £163,079.95 | 177,882 litres. 2015/16 - £164,765.46 – 164,412 litres. |
| Number of vehicles per operational employee (Yrly) | 0.63 | 0.60 | Number of vehicles = 76. Number of employees = 126. Previous year 2015/16 – 0.62. |
| Percentage of voids completed on time | 96.50% | 95.16% | Previous year 2015/16 – 94.34%. Although additional elements of work are carried out internally to bring an increased number of voids up to the WHQS, there has been a marginal improvement on the |

| | | | |
|--|-------|-------|---|
| | | | previous year's performance due to an overall reduction in void numbers i.e. 729 for 2016/17 compared to 851 for 2015/16. |
| Refurbishment voids turnaround (average number of calendar days keys held by in-house workforce) | 60 | 62.88 | Target marginally over due to the additional volume of WHQS work completed. Previous year figure 2015/16 - 57.61. |
| Routine voids turnaround (average number of calendar days keys held by in-house workforce) | 11.50 | 11.73 | Target marginally over due to the additional volume of work completed. Previous year figure 2015/16 - 11.40. |

Key objectives for 2017/18

4.9 The key objectives for the section contained in the 2017/18 service plan:

- Replace mobile working devices used by HRO surveyors with improved devices. The new devices have improved coverage and will facilitate improved management of appointments, taking photographs, using forms and folios, raising jobs and drawing up specifications.
- Improve performance of statutory maintenance, particularly in relation to gas servicing.
- Undertake a review of the no access procedure to support improvements to statutory maintenance services.

4.10 Other priorities for 2017/18 include:

- Continue to support the WHQS section in all elements of work to ensure the programme is completed on time.
- Finalise review of the "no access" procedure and implement changes.

Main risks

4.11 The key risks identified for 2017/18 are:

- Increase in void properties could lead to prolonged void periods, increased costs in addition to rent loss.
- Failure to comply with our statutory requirements could have severe implications for our tenants and put the authority at risk.

Private Sector Housing

4.12 The section is responsible for the provision of major and minor works of adaptation for disabled persons living in the public and private sectors, improving the condition of homes in the private sector through individual grants, area renewal schemes, home improvement loans and regulation and also the return to use of long term empty homes in the private sector. The section maintains the Common Housing Register and is responsible for the delivery of homelessness services. It is also assisting in the delivery of the WHQS programme, by project managing external works to leasehold blocks of flats throughout the borough.

4.13 The section consists of 65 members of staff (FTE) with a budget of £6.2m (£3.3m capital (for grants), £1.1m capital (for loans) and £1.8m (net) revenue.

4.14 Analysis of performance and customer satisfaction information tells us that, despite ongoing budget pressures, overall, the section continues to provide a wide range of good quality services.

Performance in 2016/17

4.15 Examples of achievements in 2016/17 include:

- Worked in partnership with Cartrefi Hafod to increase access into the private rented sector for those people who are either homeless or threatened with homelessness.
- Utilised an under-occupied residential block of flats in Rhymney to provide a supported housing options scheme for predominantly single people aged 16 plus.
- Worked in partnership with the local churches and a contracted support provider, over the winter months, to provide shelter and support in the borough to 19 rough sleepers.
- Undertaken the necessary preparatory work to successfully introduce the common housing register.
- Undertaken a range of activities to increase awareness of the (Rent Smart Wales (RSW) service) Housing Act 2014 requirements in relation to the mandatory registration and licensing of private rented sector landlords and agents, which included newspaper adverts, posters/flyers, merchandise, etc.
- Signed the Memorandum of Understanding between the Single Licensing Authority and all councils in Wales in relation to service standards and roles associated with the Rent Smart Wales initiative.
- Increased the number of long term empty private sector homes brought back in to beneficial use by direct action and produced an electronic database.
- Completion of Area Renewal Scheme at Senghenydd.
- High level of customer satisfaction for the delivery of adaptations.
- Support the delivery of WHQS works to leasehold properties.

Areas for improvement:

4.16 Areas that required improvement for 2016/17 were identified as:

- Increasing the number of long-term empty properties in the private sector returned to beneficial use by direct action of the council, including improved communication, marketing, loans, etc. (estimated to be over 900 properties), given that we are currently below the national average in respect of empty property activity.
- Improving performance in relation to the provision of adaptations following the proposal for new performance measures being suggested by Welsh Government which will ensure standardised, consistent reporting by all Authorities.
- Reduce reliance on the use of B&B establishments for the temporary accommodation for homeless persons.

| Key Performance Indicators | Previous Year 2016/17 | | Progress / Comments |
|--|-----------------------|--------|---|
| | Target | Actual | |
| The average number of calendar days taken to deliver a Disabled Facilities Grant (Annual). N.B in this PI "average" reflects the inclusion of all schemes of adaptation in excess of £1000 irrespective of the size of the schemes which will range from as little as £1500 for something like a stair lift installation to as much as £50,000 in respect of the more complex schemes involving lifting, hoisting and where bedroom/bathroom extensions are necessary. | 280 | 282 | Officer workload pressures due to new contract framework arrangements being required, as well as extra grant funding to be expended and the additional duties taken on by the Team Leader following the deletion of the Principal Housing Officer (Agency) post contributed to being just outside our target. Following staff changes, procedures are now also being reviewed which will take into account the performance measure changes being introduced by W.G. |
| The average number of days taken to deliver a LA tenant adaptation other than a DFG N.B in this PI "average" reflects the inclusion of all | 175 | 221 | Officer workload pressures due to new contract framework arrangements being required, as well as extra grant funding to be expended and the additional duties taken on by the Team Leader following the |

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| schemes of adaptation in excess of £1000 irrespective of the size of the schemes which will range from as little as £1500 for something like a stair lift installation to as much as £14,000 in respect of the more complex schemes. | | | deletion of the Principal Housing Officer (Agency) post have contributed to this level of performance. Redeployment of Technical Support from the Renewal Team was not practicable however, any urgent adaptations are expedited. Processes will be reviewed to ensure this is addressed for the future. |
| The average number of calendar days taken to deliver low cost adaptation works in private dwellings where the Disabled Facilities Grant process is not used | 36 | 34 | Low cost adaptations are those costing less than £1000 e.g. small ramps, handrails, grab-rails, key-safes etc. During 2016/17, across both public and private sectors, we undertook approximately 1500 schemes of this nature. |
| The average number of calendar days taken to deliver a disabled facilities grant of less than £5k | 250 | 248 | During 2016/17 we delivered 103 schemes of this nature. |
| Enquiry to approval times - Disabled Facilities Grants (days) | 145 | 163 | This figure relates to the average amount of time that housing staff take to approve and award work for a Disabled Facilities grant following receipt of the recommendation from Social Services. Officer workload pressures due to long term sickness absence and the additional duties taken on by the Team Leader following the deletion of the Principal Housing Officer (Agency) post have resulted in failure to meet our target. Redeployment of Technical Support from the Renewal Team was not practicable but processes will be reviewed to ensure this is addressed for the future. |
| Enquiry to approval times Public Sector Adaptations (days) | 63 | 131 | This figure relates to the average amount of time that housing staff take to approve and award work for an adaptation following receipt of the recommendation from Social Services. Officer workload pressures due to new contract framework arrangements being required, as well as extra grant funding to be expended and the additional duties taken on by the Team Leader following the deletion of the Principal Housing Officer (Agency) post have contributed to this level of performance. Redeployment of Technical Support from the Renewal Team was not practicable, however processes are being reviewed to ensure this is addressed for the future. |
| Enquiry to approval times Minor Works Grants (days) | 255 | 298 | The key officer relating to the processing of this type of grant has been on long-term sickness absence and has recently ended their employment with the Authority. Redeployment of Technical Support from the Renewal Team was, unfortunately, not practicable, however, the post is currently being advertised to find a suitable replacement. |
| Percentage of grant recipients who stated they | 96% | 99% | This figure reflects the provision and activities of an effective in house Agency |

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| were satisfied with the conduct of the builders. | | | Service who oversee adaptations schemes on the clients' behalf. |
| Percentage of grant recipients who stated they were satisfied with the length of time it took to complete the grant work. | 92% | 97% | This figure reflects the provision and activities of an effective in house Agency Service who oversee adaptations schemes on the clients' behalf. This level of satisfaction also reinforces the national opinion that the statutory performance indicator for waiting times for DFG's is extremely misleading and is no longer fit for purpose. |
| Percentage of grant recipients who stated they were satisfied with the quality of the grant work. | 96% | 99% | This figure reflects the provision and activities of an effective in house Agency Service who oversee adaptations schemes on the clients' behalf. |
| % of social housing applicants whose formal application to the Common Housing Register is suspended. | 10% | 8.42% | These figures relate to those housing applicants whose applications on the Common Housing Register are suspended generally as a result of them being incomplete and where we are awaiting further information before being able to make their application "live." |
| % of New Tenants who found completing Housing Application Form easy - Tenant Survey. | 85% | 88.95% | |
| The number of new affordable housing units provided during the year as a percentage of all new housing units provided during the year | 45% | 47.36% | 2015/16 data shown. 162 out 342 properties were affordable. 2016/17 data is not prepared until July 2017. |
| Percentage of the houses in multiple occupation known to the local authority that are subject to enforcement activity | N/a | 0% | All non compliance matters identified during programmed inspections were effectively dealt with via informal means resulting in no enforcement action being necessary. |
| Percentage private sector dwellings returned to occupation that had been unoccupied for more than 6 months due to direct action from CCBC (Qtly accum) | 4.30% | 6.40% | Improved communication including a mail shot was undertaken to all relevant empty home owners, which improved performance for 2016/17. This PI is no longer National Strategic PI and so comparison nationally is no longer available. |
| Houses in Multiple Occupation (Properties occupied by more than one household)- Number of assessments carried out under the Housing Act 2004, by property type | N/A | 70 | These properties are inspected against a risk based programme. This figure is compliant with the CCBC Houses in Multiple Occupation Risk Assessment Inspection Programme. |
| Owner occupier - Number of dwellings improved via private housing loans, by tenure | N/a | 16 | This figure will increase over time as home improvement loans continue to become an alternative option to grant for many homeowners. |
| Single Occupancy - Number of Housing Health and Safety Rating assessments carried out under the Housing Act 2004, by property type | N/A | 468 | This figure is reflective of the high number of service requests undertaken as part of their duties by the 3 District Environmental Health Officers based within Private Sector Housing. |
| The average number of days that all homeless households spent in bed and breakfast accommodation. | 30 | 17.32 | This indicates that we have become more effective at moving people into either more appropriate temporary accommodation or into secure accommodation because they |

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| | | | are spending less time in B&B We are, however, constantly striving to reduce our reliance on the use of B&B accommodation for emergency accommodation. At the time of writing we have only one client in B&B, although there was a short period during early 2017 when we were forced to place 15 persons into B&B. The B&B position is therefore, extremely hard to predict. |
| The number of people provided with financial assistance by the homelessness team to access accommodation in the private rented sector (excluding temporary accommodation). | N/a | 231 | We utilised WG transitional homelessness funding to assist households to access accommodation prior to them getting into a homelessness crisis situation. This type of intervention prevents homelessness from occurring and reduces the actual number of people to whom the council may later owe a duty towards. Therefore, the higher this number is, the fewer households need to be accepted under the subsequent duties in the 3 PIs below. |
| Cases who have had homelessness prevented (linked to a national PI Table 1.3 – Eligible, threatened with homelessness, prevention assistance provided (Section 66)). | N/a | 73.27% (447 out of 610) | The number of people we assisted in preventing their homelessness under Section 66, as a percentage of the total number of people entitled to receive our assistance. 78% of these are single persons. |
| Cases who have had their risk of homelessness relieved by providing alternative accommodation (linked to a national PI Table 1.4 – Eligible, homeless, subject to duty to help to secure (Section 73)). | N/a | 46.2% (243 out of 525) | The number of people assisted into accommodation as a percentage of the total number owed this duty (section 73) 'RELIEF DUTY'. This number is reflective of applicants withdrawing their applications, loss of contact with applicants, refusing assistance. 89% of these are single persons. |
| The number of people determined as homeless as a percentage of the number of people threatened with homelessness who approach the Council for assistance (linked to a national PI Table 1.5c – Eligible, unintentionally homeless and in priority need (Section 75)). | N/a | 81% (67 out of 82) | The number of people we successfully assisted into secure accommodation as a percentage of the total number owed this duty. These households are eligible, unintentionally homeless and in priority need (Section 75)). 90% of these are single persons. |

Key objectives for 2017/18

4.17 The key objectives for the Private Sector Housing section contained in the 2017/18 service plan are:

- To participate in the “Your Money Your Home” project coordinated by the Wales Cooperative Centre, in an attempt to prepare private rented sector tenants from the removal of housing benefit safeguarding arrangements.
- Establish a working group of key stakeholders to consider a range of solutions to mitigate the impact of welfare reform on the under 35s as affordability is going to be a key factor for single person accommodation in particular.

- Pursuing registration and / or licensing compliance by private sector landlords / letting agents in all identified instances of non compliance to ensure the statutory demands of the Housing (Wales) Act 2014 are met. We also need a quality and compliant PRS to enable us to utilise this sector for our wider housing needs.
- Further awareness raising initiative with regard to Rent Smart Wales requirements. The exact nature and extent of the initiative will, however, be dependant on the level of grant funding received from Welsh Government to support our activities.
- Continue to seek improvements in the provision of the adaptations service in line with the demands of the recently introduced ENABLE scheme.

4.18 Other priorities for 2017/18 include:

- Improved partnership working to maintain impetus with regards to the number of long-term empty properties in the private sector returned to beneficial use by action of the council.

Main risks

4.19 The key risks identified for 2017/18 are:

- Single people aged under 35 reliant on benefits for their housing costs will be at risk of homelessness. The Authority needs to work with all housing sector partners to find sustainable housing solutions. The Authority is at risk of a substantial increase in homeless presentations without any affordable housing solutions available to assist them, which is a legal requirement.
- Our ability to influence property conditions/standards and compliance rates for private sector landlords/letting agents would be compromised by an ineffective Rent Smart Wales awareness raising initiative.
- Our ability to successfully deliver the Enable initiative will be compromised without a further review of staff resources and current operational practices within the Adaptations Team.
- Demand for temporary accommodation needs to be continually monitored due to potential changes in demand for homeless persons/households.

Public Sector Housing

4.20 The section is responsible for the day-to-day delivery of the landlord services function to council tenants (10,828 council owned houses and 994 garages) in accordance with all statutory requirements and council policies. It consists of 108.5 members of staff (FTE) with a budget of £6m p.a. and income collection of £51m p.a.

4.21 In the absence of available published benchmarking data from other Welsh local authorities with retained stock our ability to compare our performance against housing management services in other areas is very limited. Although, our performance information compared against our targets shows that we are generally sustaining high standards of service delivery. There are some areas of weakness that we are aware of, such as low demand for certain property types and areas, and are actively working to address. It is becoming increasingly more challenging in the current environment with significant legislative changes to sustain and maintain standards.

Performance in 2016/17

4.22 Examples of achievements in 2016/17 include:

- Completed preparatory work regarding the replacement of the Capita Housing Management IT system.
- Completed a consultation exercise with affected tenants before deciding to pilot the introduction of service charges for certain new services in Holly Road flats.

- Carried out an assessment to confirm that Universal Credit will not affect our current ambitions to introduce service charges for all tenants that receive eligible services, due to the nature of service charges currently being considered for general needs tenants.
- Determined the actual cost of services provided for each sheltered housing scheme, allowing us to undertake consultation with tenants before a new recovery system is introduced based on actual costs incurred by a scheme.
- Undertaken research to establish how other local authorities recoup the cost from leaseholders of providing the leaseholder services management function.
- Agreed a programme to bring our sheltered housing schemes up to the WHQS and commenced feasibility studies on 6 schemes identified for potential remodelling.

Areas for improvement:

4.23 Areas that require improvement were identified as:

- Some of our sheltered housing accommodation suffers from low demand and is not suitable to meet the needs and expectations of current and future tenants. We need to consider options to improve the quality and accessibility of this accommodation to increase demand, or consider alternative uses.
- Rent loss from void properties remains high, as does the number of tenants requesting a transfer. We need to increase demand for our properties, particularly in some of our lower demand areas in the north of the borough and sheltered schemes.
- We do not equality monitor the delivery of our services to tenants and, therefore, we do not know who our customers are and are unable to fully tailor services to meet their individual needs. Improvements are needed to IT systems to enable equality monitoring to be mainstreamed across the service.
- There are some areas of the service where we do not know what our customers think because tenant or leaseholder satisfaction surveys have not been undertaken. Opportunities for completion of customer satisfaction surveys that can add value to services need to be identified.
- We do not fully recoup the cost of providing the leaseholder services management function which results in a reduction in income to use on maintaining existing or developing new services. The service charge needs to be increased to ensure it better reflects the cost of administering the Leaseholder service.

| Key Performance Indicators | Previous Year 2016/17 | | Progress / Comments |
|---|-----------------------|--------|--|
| | Target | Actual | |
| The average number of calendar days taken to let lettable units of accommodation during the financial year for permanent accommodation (Annual) | 46 | 64.26 | <p>This PI reflects the total void time for a property in debit, from end of one tenancy to commencement of a new tenancy.</p> <p>Over the course of the year a number of low demand properties were let, in part due to the development and implementation of a marketing strategy. This is a positive housing management outcome but it adversely affects the overall re-let time. The average re-let time for properties that are not classed as low demand is 58.58 days, against a target of 46 days, however, the average re-let time for low demand properties is 138.71 days. This has a negative impact on the overall average re-let time. 49 of 692 properties allocated were classed as 'low demand'. Demand for properties north of Aberbargoed is limited and some of our sheltered housing schemes that comprise bedsits are also low demand Six sheltered schemes comprising bedsits have been</p> |

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| | | | identified for consideration for remodelling and are pending the outcome of ongoing feasibility studies. The HRO team are increasingly carrying out comprehensive WHQS works to void properties rather than repairs, which improve the outcome to new tenants but, of necessity, is leading to longer void durations. Of the 729 properties, 144 were improved to WHQS standard by HRO. In addition to WHQS and the associated environmental programme, a Hard to Let Working Group is implementing a marketing strategy, utilising decorating allowances and the use of property guardians is being considered. Consideration is also being given to the re-designation of some low demand stock with a view to increasing demand. |
| Percentage of Council Housing Stock that is Empty (Qtly - Yr to date) | 1.80% | 1.88% | Stock = 10,821. Number of voids on 31/03/2017 = 203. This is in line with 1.9% of vacant social housing stock across Wales (both LAs and RSLs) in 15/16 (latest available data). This includes 35 low demand properties in sheltered schemes where remodelling options are being considered, and 11 properties in Rowan Place, Rhymney, where we are allocating in accordance with a sensitive lettings policy in an effort to create a new sustainable community. |
| The number of Council tenants who are affected by welfare reform and under-occupying that successfully downsized to alternative Council accommodation. | N/a | 16 | In total 1900 tenants are under occupying their properties and are affected by welfare reform. Applications for assistance via Discretionary Housing Payments are considered by Corporate Finance. Only approximately 15% want to consider down sizing. Most affected tenants have lived in these properties for many years and consider them their home and are very reluctant to move. These tenants continue to be assisted by our Tenant Support Officers. |
| Percentage of tenants satisfied with visit by a TSO. | 97% | 99% | Relates to council tenants only. 2183 tenants were visited and over the year 600 telephone surveys completed (28% surveyed). |
| The total amount of rent arrears owed by former tenants in permanent accommodation which were written off as unrecoverable during the financial year as a percentage of the total rent collectable for the financial year (Qtly accum - Year to date) | 0.50% | 0.51% | Value written off as unrecoverable - £267,833. Outturn slightly above target but lower than last year (0.54%). We actively pursue recovery of debts from former tenants when able to locate them, including the use of debt collection agencies. If recoverable and non statute barred debts are written off we retain a record of the debt and are able to write them back into debit if we subsequently locate the former tenant or they reapply for housing. |
| The total amount of rent lost | 1.90% | 1.93% | Rental void loss - £995,286. |

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| due to lettable units of permanent accommodation being empty as a percentage of the total rent debit for the financial year (Qtly accum - Year to date) | | | The increase in the average number of calendar days to let units of accommodation has a consequential impact on the void loss. The sensitive lettings policy in Rowan Place, which is due to be reviewed in August 2017, consideration of remodelling proposals for some sheltered schemes and increase in WHQS works for void properties, are all appropriate management interventions but each contributes to rent losses. The introduction of the new Common Housing Register, Common Allocations Policy and associated procedures have also been recognised as having an impact on rent loss in Q4 as officers and tenants adapt to the new system. Losses will be closely monitored in 17/18 with the interventions above subject to review. |
| The total amount of rent arrears owed by current tenants as a percentage of the total rent collectable for the financial year - Permanent Accommodation (Qtly accum - Year to date) | 3.00% | 2.73% | Value of rent arrears - £1,436,000. Rent arrears have been maintained at the same level as the previous year. |
| The number of council tenants affected by welfare reforms who were visited in their own homes and provided with advice and support to minimise the impact of the changes | 2,000 | 2,183 | Encompasses tenants affected by any of the changes to the welfare benefits system including the bedroom tax. |
| The number of council tenants referred for money and debt advice as a direct result of face to face support on the impact of welfare reforms | 150 | 197 | |
| The value of financial savings generated for tenants as a direct result of face to face support on the affect of welfare reforms | £300,000 | £338,143 | This includes additional Housing Benefit and welfare benefit savings, together with assistance with water costs. |
| The number of people supported by tenancy support officers to access benefits they are entitled to [council housing only] | 600 | 1,965 | Promotion of the Welsh Water tariff <i>Help U</i> has led to a very large number of tenants having a reduction on their water rates saving on average £350.00 per year |
| Legal action resulting in a Court Order will be reasonable and proportionate to the number of ASB referrals | 2% | 1.27% | 8/628 referrals for anti-social/nuisance behaviour with links to the housing management function, including noise (244 cases), verbal abuse/harassment/intimidation (188 cases), drugs (71 cases). The 8 cases included 5 injunctions and 3 Suspended possession Orders. |
| Maximise the use of the VIP to support tenants at risk of losing their homes | 8 | 10 | Target exceeded. Refers to number of referrals to the Valleys Inclusion Project. |
| Satisfaction with the way ASB complaints are handled by the TES. | 90% | 87.5% | A response rate of 22.2% (32/144) |

Key objectives for 2017/18

4.24 The key objectives for the section contained in the 2017/18 service plan:

- Seek member approval for selective re-designation of older persons' accommodation to general needs.
- Carry out a review of the wider housing stock to identify other opportunities to re-designate council housing stock to meet changing demands.
- Report on the de-pooling of service charges for sheltered accommodation from rents to be presented to P&R scrutiny committee in July 2017.
- Introduce a new charging system for sheltered housing and inform tenants of their new charges.
- Complete an on-going option appraisal, assessing the potential to remodel or redevelop (6 schemes), and possible re-classification of some older persons accommodation generally.
- Learn the lessons from the roll out of universal credit in Torfaen county borough in relation to housing costs for 18-21 year olds.
- Seek membership of and learn lessons from the Welsh Government led review of funding for supported accommodation.
- Provide training for frontline housing staff on welfare reform and the impact on tenants. Consider joint training with the housing associations and keep tenants informed.
- Carry out a review of the affordability checks undertaken by the council for new tenants.
- Prepare the business case for the replacement of the existing Capita Housing IT system.
- Introduce tablet devices to pilot the introduction and development of mobile working opportunities for officers, with a view to improving efficiency and effectiveness.
- Undertake an exercise to identify costs that need to be considered as part of the management charge for leaseholders.
- Consider the need for a local lettings policy in Lansbury Park, Caerphilly by preparing a clear evidence base.

Main risks

4.25 The key risks identified for 2017/18 are:

- Incurred rent loss through low demand if we fail to secure member support to re-designate stock to meet changes in demand.
- Legislative and financial risk will occur if members fail to support new charging system for sheltered housing, however, its introduction could result in reduced levels of customer satisfaction and an increase in complaints received.
- Failure to identify or implement viable remodelling options or alternative uses for sheltered housing schemes could result in continued rent loss. Also, the preferred option for remodelling may be cost prohibitive to implement.
- Increased rent arrears and evictions could occur if we do not carry out appropriate affordability checks on prospective tenants.
- Insufficient resources to complete the business case for the replacement of the existing Capita Housing IT system would hinder our ambitions to improve the efficiency and effectiveness of services and introduce equality monitoring.
- An inability to recoup 100% of the cost of providing the leaseholder services management function will result in a reduction in income to use on maintaining existing or developing new services, due to the need to subsidise the function from our sources of funding.

Welsh Housing Quality Standard

4.26 The Council has a housing stock of 10,822 properties comprising 13,000 tenants and will be investing over £200m in bringing all homes up to the Welsh Housing Quality Standard by 2020. Since embarking on the delivery of the programme, it has always been our intention to utilise this investment, not just to improve homes, but to also transform peoples lives and the communities in which they live.

- 4.27 The approach taken was in accordance with W.G. guidance and included consultation with tenants, which resulted in the programme being delivered by undertaking internal and external works separately and in different communities. The programme set out the number of properties that were required to be completed within each community for each year, in order to achieve the standard by 2020.
- 4.28 Due to the scale of the project, work was to be undertaken by the in-house workforce and external contractors and was structured to provide opportunities for local business in order to maximise support for the local economy. In addition, the contracts included core requirements for the contractors to provide community benefits, particularly in relation to providing opportunities for work placements, training, apprenticeships and jobs.
- 4.29 An environmental programme was also agreed in order to meet the WHQS requirements that properties be located in attractive and safe environments. This is programmed to be delivered over the next three years, with the work predominantly being undertaken by various in-house services including Housing Repair Operations Team, Highways Operations Group and Grounds Maintenance. Resources are also being used across Caerphilly Homes to assist in identifying projects through local knowledge, tenant and member enquiries, as well as consultation with various community groups.
- 4.30 The WHQS requires properties to meet the specific needs of the household which aims to not only assist with individuals' health and wellbeing, but also helps to reduce accidents within the home. To deliver on this requirement a number of Occupational Therapists have been appointed and work alongside our surveyors to provide a needs assessment. This has resulted in specific adaptations being made to tenants' homes to help with any medical or physical conditions they may have.
- 4.31 The WHQS section consists of 65 members of staff (direct delivery) charged to the WHQS programme (£2.6m) and 38 dedicated support staff funded by the HRA (£1.5m). The key areas of work are the delivery of a multi million pound annual capital programme (2017/18 - £53.5m). There are also WHQS related works managed through the revenue response budget and charged to the WHQS programme in relation to WHQS voids and heating installations (circa £2m). In addition, there is circa 174 in-house workforce assigned to the WHQS programme with a profile of £12m spend in 2017/18 to include the internal and external WHQS works to our sheltered schemes in addition to the general stock works.

Performance in 2016/17

- 4.32 Examples of achievements in 2016/17 include:
- Delivery of the 2016/17 capital investment programme (£31.4m) in respect of internal and external repairs and improvements.
 - Completion of internal improvement works to 2171 properties against a target of 2242.
 - Completion of external improvement works to 950 properties against a target of 3395.
 - Monitoring of standards set out in the Charter for Trust by both the in-house workforce and contractors. Standards met during the year was 85% against a target of 90%.
 - Delivery of a customer focussed programme with high levels of satisfaction recorded. Satisfaction levels achieved were 90% against a target of 80%.
 - Meet the requirements of Part 7 of WHQS by undertaking adaptations recommended by OT officers. There were 430 specific tenant adaptations made to properties during the year for WHQS works.
 - Implementation of the Environmental Programme Engagement Plan in accordance with the timetable agreed with WHQS Project Board, including minor wall repairs, installation of fencing, benches and bollards along with general tidying up of areas and carpark maintenance and repair.

Areas for improvement:

- 4.33 Areas that require improvement were identified as:

- Re-profiling and delivery of the internal works programme. Improved target of 2505 property completions has been set for 2017/18.
- Re-profiling and a stepped change in the delivery of the external works programme. A target of 4675 property completions has been set for 2017/18.
- Effective delivery of sheltered scheme programme. 11 number sheltered schemes have been prioritised for improvements for 2017/18.
- Focussed consultation, identification and delivery of environmental programme to ensure achievement by 2020.
- Resource review to meet stepped increased in WHQS programme delivery. Targeted recruitment to be undertaken from review to ensure capacity to deliver the programme is available and allocated.
- IT utilisation/innovation to improve efficiency. This will be achieved by further development of Keystone interfaces and reporting along with a roll out of more mobile working and wider use of appointment processes utilising DRS (Dynamic Resource Scheduling).
- Additional procurement options to ensure contingency with contractor availability. This will predominantly be focussed on the use of the DPS (Dynamic Purchasing System) arrangement that is being put in place for utilisation in the LRV with consideration of its wider use elsewhere in the borough as and when required.

| Key Performance Indicators | Previous Year 2016/17 | | Progress / Comments |
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| | Target | Actual | |
| Number of homes brought to WHQS as recorded on annual return to Welsh Government (The number of houses that have achieved WHQS standard in the year) | 1,263 | 270 | Due to the way in which the programme is configured (internal and external works undertaken in different sequence) the compliance rate for whole property completion will not materialise until later in the programme. During 2017/18 there are 26 community areas where either internal or external works are planned and there have previously been WHQS improvements made i.e. the works are now overlapping. As such these community areas are planned to achieve full WHQS compliance by March 2018. This will further increase in the following years and achieve full compliance of all properties by 2020. |
| Number of homes compliant with WHQS in respect of their external elements | 3,395 | 950 | The main reason for this level of performance has been that the lower Rhymney valley (LRV) did not have contractual arrangements in place to undertake external works. In addition there was a shortfall in contractor availability in both the north and east of the borough. The LRV contractor is now in place for commencement in April 2017 and also provides contingency to assist in other areas of the borough as and when needed. Further the DLO has been instructed to undertake external works to the sheltered schemes and private sector housing are assisting in delivering external works to leaseholder properties. |
| Number of homes compliant with WHQS in respect of their internal elements | 2,242 | 2,171 | Reasons why there is currently a slight under achievement include no access to tenants' properties and there have also been some issues with the performance of external contractors where they have not achieved the targets set. A new "No Access" procedure was introduced during 2016/17. This has |

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| | | | identified that there have been 217 properties that tenants have failed to engage to allow works to progress. These properties have now been deferred to the end of the programme. |
| Charter for Trust Standards | 90% | 85% | Reasonable performance achieved. However, work is being undertaken with the contractors to ensure that performance in this area is improved. The Charter for Trust is key to ensuring tenants are at the centre of the successful delivery of the programme. This performance will be specifically targeted for action and improvement throughout the year within the monthly progress meetings undertaken with contractors. |
| No of homes adapted as part of WHQS works to meet specific needs of household. | N/a | 430 | There are no targets set as it is only from the surveys that you can identify if there are specific tenant needs. If identified these works are implemented. Since the start of the programme there have been 768 specific tenant property adaptations undertaken. |
| The % of tenants whose homes have been improved internally through the WHQS programme are satisfied with the completed works. | 80% | 90% | Overall performance is good with tenant expectations exceeding the targets set. This measure captures tenants' views on completion of the works to their property. The tenants generally reflect their satisfaction with the overall approach to the whole delivery of the improvements along with the final product. |

U Key objectives for 2017/18

4.34 The key objectives for the WHQS section contained in the 2017/18 service plan:

- Delivery of the 2017/18 capital investment programme in respect of internal and external repairs and improvements. The internal properties identified for improvements during 2017/18 are 2505 and for externals are 4675.
- Delivery of a customer focussed programme with high levels of satisfaction. Satisfaction levels have been set at 80% which is consistent with the approach identified at the start of the WHQS programme.
- To meet the requirements of Part 7 of WHQS by undertaking adaptations where these are identified.
- Implement environmental improvements to meet part 6 of the standard to create attractive and safe communities through direct engagement and consultation with communities throughout the borough. Over 200 minor improvement and repair schemes have already been identified during 2016/17 and will be delivered throughout 2017/18. Throughout 2017/18, work will concentrate primarily on identifying fewer, higher impact projects that seek to deliver wider benefits to local communities. It is impossible to determine how many individual projects will be delivered during 2017/18 until the consultation and engagement process has been undertaken however, it is anticipated that the environmental officers will deliver consultation and engagement events in a minimum of 18 communities during 2017/18.
- Identification and pursuit of external funding opportunities to support energy efficiency measures. This will be achieved by working closely with Welsh Government on the implementation of the ARBED scheme and or other energy efficiency measures that are to become available.
- Create a Coalition for Change (as per the Deep Place Study undertaken by Dr Mark Lang and Professor Dave Adamson) to oversee and guide the transformation of Lansbury Park specifically.

- Develop an appropriate governance structure and action plan to underpin the work of the Coalition for Change which sets out an initial framework for transformation over the next 3-5 years and which acknowledges that transformation is a long term commitment and may not be realised for a further 10-20 years.
- Develop a cohesive and sustainable place plan to identify a portfolio of physical improvements to Lansbury Park over the next 3-5 years.
- Ensure that the residents of Lansbury Park are engaged and involved in decisions affecting their community.
- Developing a cohesive and sustainable proposal to build a resilient community in Lansbury Park in readiness for a new WG regeneration programme in 2018/19.
- Deliver EWI and enhanced improvement programme to 320 Council homes and 76 privately owned homes as part of phase 1 in Lansbury Park.
- Deliver EWI and enhanced improvement programme to 200 Council homes and 98 privately owned homes as part of phase 2 (subject to receipt of ARBED funding) in Lansbury Park.

4.35 Other priorities for 2017/18 include:

- Continue to maximise the delivery of community benefits resulting from the WHQS supply partner, internal works and external works contractual arrangements.
- Monitor standards set out in the Charter for Trust by both the in-house workforce and contractors. Ensure that the target of 90% satisfaction with standards met is achieved by closely monitoring and liaising and challenging contractors in monthly progress meetings.
- Completion of the Rowan Place improvement project. This was a £4.2M investment to transform Rowan Place which had Anti Social Behaviour issues and hard to let properties. The properties also suffered from extreme damp issues that needed resolution. Both the properties and the local environment have been transformed as a result of the investment.
- Support the Wales Audit Office with the pending review of the WHQS delivery programme.

Main risks

4.36 The key risks identified for 2017/18 are:

- A range of factors may result in an inability to achieve WHQS programme objectives. Some of the key factors are detailed below. The programme is wide ranging in its remit and complex in the arrangements required for its delivery.
- Challenge to contract documentation/management/volumes/values leading to potential contractual disputes.
- Insufficient capacity to complete annual WHQS investment programme. There have been recruitment issues over previous years in both technical staff and workforce trades. This is predominantly down to an industry skills shortage and a buoyant market place. This could impact on the external works programme and the DLO Delivery teams.
- Changes to the business plan. (The council may not receive the major repairs allowance and/or the programme may have to be reviewed if the business plan became unviable). Although this is recognised as a risk it is considered a very low risk and extremely unlikely of occurring.
- Unforeseen costs could affect viability of the business plan and/or result in the programme being reviewed. This is a result of the Savills stock condition survey only being undertaken to 15% of the stock as a sample. However, existing in-house surveying is now significantly advanced and there are increasing levels of confidence in the data available. Further knowledge has also been gained from the works already undertaken. Taking into account both the works completed and the advanced in-house survey data any risk in relation to unforeseen costs is being minimised where possible.
- Our plans to carry out improvements in the Lansbury Park area may be compromised by a lack of funding to include the privately owned properties. However, there is ongoing

work being undertaken with Welsh Government to try and identify potential funding sources that will allow this work to be funded and progressed.

- Our efforts to facilitate the transformation of Lansbury Park may be hampered through a lack of multi agency support. However, the risk is minimal as a result of receiving support and endorsement from the PSB (Public Service Board) and also the creation of the Coalition for Change which is chaired by the Director of Communities and includes high level senior representatives from all key partner organisations.
- We may not be able to carry out the planned improvement programme in Lansbury Park if Welsh Government funding is not forthcoming. If this is the case the authority will need to consider any other options available to ensure the much needed transformation of Lansbury Park is not compromised.
- The EWI + Programme (phase 1 or 2 in Lansbury Park) may be delayed if we are unable to gain access to the properties when required. Experience to date identifies that this appears to be a low risk with works already being undertaken on site.
- Insufficient resources to identify, plan, organise and oversee works contracts. Alternate staffing arrangements have already been implemented to reduce this risk. Other Council service area's such as Building Consultancy, Engineering, Grounds Maintenance, Private Sector Housing and HRO are already being utilised to ensure sufficient resources are available. In addition job descriptions have been amended in some cases to make recruitment and utilisation of staff across roles more flexible such as combining the surveyor/Clerk of Works role.
- Contractor availability to undertake works may impact on delivery of the WHQS programme. This risk has been reduced by the introduction of the DPS contract for the LRV. This contract has the flexibility to be utilised anywhere in the borough and for internal works, external works and assistance with DLO works.

Monitoring arrangements

4.37 The delivery of the objectives outlined in this report will be monitored through the following methods:

| Frequency | MONITORING ARRANGEMENT |
|------------------|--|
| Weekly | Review financial & operational performance reports Consider weekly workloads |
| Monthly | WHQS Project Board Performance data review meetings Service plan review meetings Financial and operational performance and strategy review meetings. Financial monitoring meetings (capital) |
| Bi-monthly | Financial monitoring meetings (revenue) |
| 6 weekly | Caerphilly Homes Task Group (WHQS) Housing management team meeting |
| Quarterly | Aspireview updated and reviewed Performance management meetings Performance management unit review support meeting Performance management reports – Aspireview Progress reports to chief officer |
| 6 monthly | Reports to Policy and Resources scrutiny committee and Cabinet Progress reports to head of service Performance management meeting |
| Annually | Performance development reviews for all staff Benchmarking (APSE) Aspireview updated and reviewed Year end report to head of service Year end report to P&R scrutiny committee WHQS programme review (please see attached current community based programme in Appendix 1). |

Conclusion

Having assessed the outcomes and performance for 2016/17 as well as considering the challenges that Caerphilly Homes face, the following key priorities have been identified within the 2017/18 service plan, with the aim of delivering continuous improvement:-

The following priorities were identified in the 2017/18 service plan:

1. Improve delivery of the WHQS capital investment programme.
2. Investment in homes to transform lives and communities (Wellbeing Objective 5).
3. Undertake a number of initiatives to address low demand in council housing.
4. Complete the de-pooling of service charges from rents exercise in sheltered housing.
5. Carry out an options appraisal into the remodelling of a number of our sheltered housing schemes, including assessing the potential for redevelopment.
6. Consider the potential impact of further welfare reforms, including local housing allowance, on existing and prospective council, housing association and private rented sector tenants and identify solutions to mitigate the impact of such reforms.
7. Reviewing our ICT requirements including replacement of the Capita system, taking into consideration the collection, use and maintenance of data from the customer profiling exercise, and mobile working.
8. Implement a new management charge schedule for leaseholders.
9. Full operational implementation of the Rent Smart Wales scheme.
10. Contribute towards addressing the issues which resulted in Lansbury Park being identified as the most deprived area in Wales (WIMD 2014).

5. WELL-BEING OF FUTURE GENERATIONS

- 5.1 The provision of a highly performing housing service is coterminous with the 7 well-being goals contained within the Well-being of Future Generations Act (Wales) 2015.

6. EQUALITIES IMPLICATIONS

- 6.1 An equality impact assessment is not required as the report is for information purposes only.

7. FINANCIAL IMPLICATIONS

- 7.1 There are no financial implications to this report, although, there may be in respect of the individual actions.

8. PERSONNEL IMPLICATIONS

- 8.1 There are no personnel implications to this report, although, there may be in respect of the individual actions.

9. CONSULTATIONS

- 9.1 Comments received following consultations during the course of preparing this report have been reflected within the content.

10. RECOMMENDATIONS

- 10.1 Members are asked to consider the content of this report and, where appropriate, question and challenge the performance presented.

11. REASONS FOR THE RECOMMENDATIONS

- 11.1 Performance management scrutiny affords members the opportunity to challenge, inform and shape the future performance of the housing service and the priorities presented within this report for 2017/18.

12. STATUTORY POWER

- 12.1 Local Government Measure 2009.

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