Tenants' Strategic Group – 27th November 2023

2023/24 Housing Performance and Finance Report Quarter 2, July - September 2023

This matter is the responsibility of Councillor Smith, Portfolio Holder for Housing

Report Authors: Shari Hallett (Housing Performance Manager) and Kerry Prisco (Management Accounting and Reporting Lead)

1. Executive Summary / Purpose of the Report

This report provides an update on housing performance through key performance measures and financial information for the second quarter of 23/24 (July-Sept 2023).

2. Recommendations

The Tenants' Strategic Group is asked to note content of the housing performance scorecard and finance report for quarter 2 (July – Sept 2023). Provide feedback in relation to measures that are being reported including "new, amended, deleted measures". Provide feedback on the proposed change to target in average call response times.

3. Background and Full details of the Report

3.1 The Housing Performance Scorecard is a tool to measure our performance in key areas. The scorecard was last presented to Tenants' Strategic Group (TSG) in September 2023 covering the performance in Q1 (April-June 2023). This report covers the second quarter of 2023/24 July to September.

3.2 This report includes the (data) Tenant Satisfaction Measures which the regulator will ask us to submit in March 2024. The total number of measures reported is 35, the breakdown of measures is as follows:

Customer 10 (2 new), Rent Recovery 2, Supported Housing 1, Lettings and Voids 1, Housing Repairs 2, Tenancy Management 6 (1 new), Compliance 10 (3 new), Asset Management 2 (2 new), Development 1.

3.3 27 indicators have targets,16 are green (on target or better), 6 are red (off target but targets are 100%) and 5 are amber.

4. Risk Assessment (if appropriate)

A risk assessment is not required to accompany this report.

5. Are there any Finance / Resource, Legal implications?

There are no financial implications directly to do with the recommendations in this report.

6: Are there any Equality and Diversity Implications?

There are no equality impact assessment linked with this report

7. Are there any Data Protection Implications?

There are no data protection implications linked with this report

Performance Report

8. Customer

8.1 Customer – Complaints

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Customer					
% of stage 1 complaints closed in 10 working days (as per policy HRA)	93%	80%	87%	79%	65%
NEW – All HRA(Housing Revenue Account) Complaints relative to the size of the landlord per 1000 homes.	2.27	3.93	4.47	5.19	5.01
NEW – Complaints responded to within Complaint Handling Code timescales. (CH02)	93%	80%	92%	86%	86%

8.1.1 As part of the Tenant Satisfaction Measures (TSM) introduced by the Social Housing Regulator complaints data is requested in a slightly different format. We have added the two TSM measures alongside the % of complaints closed in 10 working days. TSG requested all three measures be retained in the report (September 2023 meeting).

8.1.2 Customer Resolution team have been capturing monthly data relating to extended complaints since April 2023 and we are confident that our management of complaint extensions and how we communicate these to our residents complies with the Housing Ombudsman's Complaint Handling Code and our Complaints Policy. However, in previous reports, we have not reported the data showing extended complaints as part of our performance indicators. We are therefore reporting statistics at their "worst performance" (not including permitted extensions). Indicator CH02 includes permitted extended complaints, the stage 1 measure does not.

8.1.3 Although our data shows higher numbers of complaints, our targets are based on Pulse 2021/2 data and therefore should be revisited once 2022/3 benchmarking is available. We apply the Housing Ombudsman Code to expressions of dissatisfaction and log complaints strictly which may increase our numbers. The quality and timeliness of our responses to date has resulted in no live Housing Ombudsman investigations since April 2022.

8.2 Customer - Lettable Standard Satisfaction

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Customer					
% of new tenants satisfied with the lettable standard of the property	90%	85%	100%	100%	93%

8.2.1 These surveys are undertaken on the phone. In the March 2022 meeting of TSG the number of new lets each month was requested alongside this satisfaction percentage, see below.

July 2023: 29 properties let, (29 responses, 29 satisfied or very satisfied), 100% satisfaction

August 2023: 28 properties let, (12 responses, 12 satisfied or very satisfied), 100% satisfaction

September 2023: 24 properties let (14 responses, 13 satisfied or very satisfied), % satisfaction

Performance is exceeding target. Comments from surveys in August include how a tenant with depression is feeling much better and how they are "having more good days than bad now they have a family home". Changes we were able to make in the garden have "lightened the house and mood" of the new tenant and finally a tenant who is "very very happy with the property and the positive impact on their lives".

8.3.1 Customer - Repair Satisfaction

8.3.1 This matter was discussed in the TSG meeting September 2022 where it was felt the electronic survey method was not robust enough. We are investigating a software and telephone survey solution. A software solution will ideally integrate with our housing system and carry out repair surveys however we are also we are discussing costs and feasibility of telephone surveys through an independent company.

8.3.2 Satisfaction with repairs formed part of the pilot Tenant Satisfaction Measures survey completed in May 2022, November 2022, May 2023 by an independent company. The TSM question focuses on repairs in last 12 months. 76% of customers surveyed in May 2022 and 81% surveyed in November 2022 were satisfied with the repair carried out in their home in the last 12 months. The combined result was 79% which is above median of 75% (comparison with other landlords by Acuity). Results were reported to TSG in January 2023. The most recent survey May 2023 reports 76% satisfaction which repeats the result obtained in May 2022.

8.4 Customer – compliments

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Customer					
Number of compliments received	n/a	n/a	5	5	2

8.4.1 We have been receiving compliments and the total for the year to date ending September 2023 is 31. The average is 5 per month and September and April are the lowest months to date.

8.5 Customer – Overall Satisfaction

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Customer					
Overall tenant satisfaction (TSM Results)	77%	75%	76% from May 2023	76% from May 2023	76% from May 2023

8.5.1 During 2022 we have surveyed twice using an independent company, (as a TSM "tenant satisfaction measure" pilot), once in May and again in November to obtain our statistical sample. The combined May and November results indicate an overall satisfaction at 77% during 2022-23.

8.5.2 Results from the first survey in 2023-24 were obtained in May 2023, 76% satisfaction. This will be combined with the result in November 2023 to give the result for the year. To provide context, the Housemark Pulse results for the first quarter of the year show 70% a median and 80% as upper quartile. A report presenting all TSM survey results was presented to TSG in September 2023 and will be reported again after the next survey.

8.6 Customer – Call Statistics

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Customer					
Average wait time in the repairs queue	00:01:00	00:05:00	00:02:18	00:02:10	00:03:08
% of abandoned calls in the repairs queue	10%	13%	7.10	5.90	9.10
Average wait time in the housing estates and tenancy queue	00:01:00	00:05:00	00:05:19	00:06:27	00:03:27
% of abandoned calls in the housing estates and tenancy queue	10%	13%	20.10%	24.60%	10.90%
NEW % of calls answered within two minutes	80%	75%	N/a	N/a	N/a

8.6.1 Following a request in the January 2023 TSG meeting, the statistics for call handling on repairs and housing estates call queues were included in this report from Quarter 3 2022-23. In September 2023 TSG agreed to include a new measure to allow benchmarking with HiS (target of 80% calls answered in two minutes), this will be reported from Q3 of 2023-24.

8.6.2 . The organisation's (Somerset Council) agreed target for calls waiting to be answered is 5 minutes and for no more than 10% calls to be abandoned, we were unable to achieve this target in July and August due to increased volumes of flooding and Council Tax recovery calls. We have however made significant improvements during September. The 1 minute target was previously set under Somerset West and Taunton Council and is not a target the Somerset Council call centres are currently resourced to meet. To bridge the gap between the 1 minute target previously applied and the 5 minute target currently applied we suggested the additional benchmarking measure referred to in paragraph 8.6.1 above. Overall customer satisfaction from our in call surveys is at 84% with 75% of calls being resolved at the first point of contact.

8.6.3 Customer Service Performance over the last quarter has improved despite several challenges due to the formation of the new Council, the Customer Services and Housing management teams meet regularly to review performance and identify training needs. The Housing phone lines are given priority over general calls to ensure the standard or performance remains within target as much as possible.

8.7 Rent Recovery

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Rent Recovery					
True current tenant arrears at the end of the month%	2%	2.2%	1.84%	1.85%	1.84%
Total number of all evictions			0	1	0

8.7.1 The performance in rent arrears is now being measured by the Housemark indicator "true current arrears". Performance in this area has improved since June 2023. Current performance is "top quartile" and on target (Housemark Pulse Q1 2023 2.2).

8.8 Supported Housing

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Supported Housing					
Sheltered housing - % of tenants receiving annual reviews of support plans	98%	97%	98.6%	98.6%	98.6%

8.8.1 Our performance is on target.

8.9 Lettings and Voids

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Lettings and Voids					
Average re-let time in calendar days (key to key)	45.9	50.5	48	58	44

8.9.1 Our void turn-around times are back on target in September.

Lettings team staffing remains very stable, we have lost our Home Move plus officer (HMP) Paul Hadley at the end of August, the downsizing is a service we still offer our tenants however that is being done by the team who are already working to capacity. Recruitment into the HMP role is to go through the recruitment process. The project is on target and remains in budget.

Work demand in the team is very high, the North Taunton flats to be allocated through Home Finder Somerset have recently been advertised - 16 flats attracted over 800 applications. Having shortlisted the new properties a viewing day was arranged when 16 flats were viewed the over whelming response was very positive with good feedback being received on the standard size and general quality of the flats. Sadly, the reletting of these flats has been delayed due to a “highways” issue which has caused additional works and delays to the incoming tenants.

Void turnaround times have remained a focus for the voids/lettings team. The figures are in line with the year-on-year average. They do fluctuate month to month and this can be due to a small number of complex voids. This month performance is better, but we know returns in October to similar levels to August due to work related to the new homes. Customer satisfaction with both the lettable standard and the standard of the process being administrated is very high.

A report is being taken to HSMT on 21st November to propose focus for improvement work on Lettings and Voids, and we are finalising a specification for a new contractor to pick up extra work which will help address capacity to tackle the volume of voids we receive.

8.10 Housing Repairs

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Housing Repairs					

Completion of housing emergency repairs within 24 hours	100%	99%	100%	100%	100%
Completion of housing non-emergency repairs within timescale agreed with tenant (TSM RP02)	93%	90%	93.4%	96.0%	97.9%

8.10.1 Our performance is on target in both emergency and non-emergency repairs this quarter.

8.11 Tenancy Management

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Tenancy Management					
Total New ASB cases in the month	No target	No target	11	14	19
Total number of ASB cases that were closed in the month	No target	No target	16	2	12
Number of ASB cases open on the last day of the month	No target	No target	73	85	92
Number of new ASB cases reported per 1,000 properties	2.08	3.5	1.97	2.5	3.4
NEW Anti-social behaviour cases that involve hate incidents per 1,000 properties	No target	No target	0.36	0.54	0.54
Number of safeguarding referrals	No target	No target	8	19	15

8.11.1 ASB - We would like the numbers to be as low as possible. Housemark Pulse benchmarking data shows top quartile in Q1 is 2.07 number of “new ASB cases reported per 1000 properties for English Councils and ALMO (the top quartile for the sector is 1.87 for the sector). Our performance is therefore top quartile for July for English Councils and ALMO. The increase in cases in September is due to more low level neighbour and noise nuisance being reported. Two factors have contributed to this increase. We have encouraged staff to log cases within the ASB module rather than through other routes, September was a warmer month which normally increases the noise nuisance cases reported.

8.11.2 It should be noted that an error was identified in the numbers reported last month when the data was not picking up cases that were opened and closed in the same month (so under-reporting cases and closed cases). This has been rectified and we have corrected previous months data.

8.11.3 Definition of Hate Crime was requested at the last meeting of TSG. A working definition is “Any criminal offence which is perceived by the victim or any other person, to be motivated by hostility or prejudice towards someone based on a personal characteristic”. A hate incident is when the victim or anyone else thinks an incident, such as bullying or abuse, was motivated by hostility or prejudice based on disability, race, religion, sexual orientation or gender identity.

8.11.4 Safeguarding – We currently raise low numbers of safeguarding referrals to Somerset Council. This quarter we have made 19 referrals. Since August, we have seen an increasing number of referrals from our Homelessness Teams in relation to safeguarding, the Homelessness Team are managing these cases. There is also greater awareness and reporting of these concerns which is important.

8.12 Compliance

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Compliance					
% of housing dwellings with a valid gas safety certificate (LGSR) (TSM BS01)	100%		100%	99.98%	100%
NEW – % of housing dwellings with a valid electrical safety certificate (EICR)	100%		92.39%	93%	94%
% of housing communal areas with a valid electrical safety certificate (EICR)	100%		100%	100%	100%
% of communal areas with all asbestos safety checks complete	100%		100%	100%	100%
% of communal areas with a Fire Risk Assessment (FRA) in place and FRA Review complete (where applicable)	100%		100%	100%	100%
% of communal areas with periodic water safety equipment checks complete	100%		100%	100%	100%
% of passenger lifts and through floor lifts with annual and 6 monthly service and inspection complete (TSM BS06)	100%		100%	100%	50%
NEW – Proportion of homes for which all required fire risk assessments have been carried out. (TSM BS02)	100%		100%	100%	100%
NEW – Proportion of homes for which all required legionella risk assessments have been carried out. (TSM BS04)	100%		100%	100%	100%
Carbon Monoxide Alarms	100%		100%	100%	100%

8.12.1 We are pleased to report 100% compliance for the indicators above, except for electrical safety and through floor lifts.

8.12.2 Electrical safety certificates show month on month improvements and a programme is on track to achieve 100% compliance during this financial year.

8.12.3 The 50% result in lift service and inspection is due to two properties with through floor lifts and not passenger lifts. One property was appointed beyond its anniversary date. This is now complete (11/10/2023). The other property is part of North Taunton project and the tenant is being decanted so the lift is to be removed ahead of demolition.

8.13 Asset Management

Indicator	Target 2023-24	Amber	July-23	Aug-23	Sept-23
Asset Management					
NEW – Target % Non-Decent Homes Compliance (TSM)	1%	4%	6% (94%)		5.93% (94.07%)

NEW – Percentage of properties EPC C or above	100% by 2030		68%	N/a	68%

8.13.1 The Decent homes measure will be reported as part of the TSM measures to the regulator at the end of the year. Decent homes percentage has improved slightly by 0.07% this represents 15 properties. Contracts for the replacement of components are being finalised and those with decent homes elements will be prioritised.

8.13.2 The % of properties with EPC C or above will remain targeted at 100% EPC C by 2030 as per the strategy. There is no need for milestones until circa 2025/2026 when the final waves of grants will start to emerge, our data will be much more accurate, our capital programme will be making inroads into SAP scores through better 'U' value specifications of replacement heating, windows, doors and loft insulation. We are also not clear on the future requirements of the new decency standard which is pending release, and which may require social landlords to achieve a certain rating, and by default the government will need to enable this through subsidy or rent setting freedoms.

8.14 Development

Indicator	Target 2023-24	Amber Threshold	July-23	Aug-23	Sept-23
Development					
Number of SWT/Inhouse service HRA new home completions since April 2019 (inc new HRA homes RSAP/LAHF)	1000 by 2049	20 per year	74	78	81

8.14.1 There have been 81 new home completion April 2019 to 30th September 2023. The number of acquisitions is set to increase significantly as a result of Rough Sleeper Accommodation Funding and Local Authority Housing Fund. The Local Authority Housing Fund will increase the HRA stock by 31 units over two years and at no cost to the HRA. In 2023/2024 NTWP has completed 6 properties and will complete a further 47.

The development of 54 new homes in Minehead is progressing well with some handovers anticipated this year. The demolition contractor for NTWP phase B&Ci and Wordsworth Drive and Coleridge Cresent Flats has been selected and is proceeding to formal contract appointment.

9. Executive summary of the Housing Revenue Account (HRA) Finance report (2023/24 Housing Revenue Account Financial Monitoring as at Quarter 1).

Executive Summary

9.1 This report provides an update on the projected outturn financial position of the Council's Housing Revenue Account (HRA) for the financial year 2023/24 (as at 30th September 2023).

9.2 The headline estimates for **revenue** costs are:

Revenue Budget	Forecast overspend of £2.44m	Red
General Reserves	£12.049m forecast balance = favourable compared to £3.722m minimum requirement	Green
Earmarked Reserves	£258k opening balance	Green

9.3 The HRA is a ring-fenced account which must abode by the accounting regulations and ensure that cross subsidy does not occur. Whist self-financing has provided some flexibilities, the HRA is heavily regulated which restricts income growth and increase cost pressures.

9.4 The HRA has set a balance budget for 2023/24 however areas of risk for the will year relate to **economic operating environment** and the impact this may have on any variation from the forecasts assumed when setting the budget, for example the cost of borrowing for the refinancing of debt, pay awards, cost of materials and utilities, etc.

9.5 In addition, there are risks associated with **regulatory and compliance** requirements. For example, changes are expected during the year in relation to the Regulator of Social Housing's decent home standard where the cost impact is unknown, as well as a new Act which places new emphasis on customer safety, quality of accommodation, engagement, communication and greater evidence of listening to our tenants. New tenant satisfaction measures are now established and reported on.

9.6 From an **operational** perspective, the risk here relates to the levels of demand from our tenants for support and service, for example for debt and benefit advice, repairs and maintenance on their properties, and the number and condition of void properties. This is a very reactive service based on the needs of the tenants.

9.7 The headline estimates for **capital** costs are:

1.8 The Housing Revenue Account (HRA) Capital Programme for 2023/24 onwards is £122.606m. This consists of £32.208m of new schemes approved for 2022/23 plus £90.397m approved budget carry forward.

1.9 The current forecast outturn is an underspend of c£4.6m for the Major & Improvement Works. The Social Housing Development schemes will be delivered over the next eight years, with the profiled budget for 2023/24 reporting an underspend of c£491k.

Democratic Path: Finance report is reported to Resources Scrutiny and Community Scrutiny and Executive committee meetings and Tenants Strategic Board – 27th November 2023.

Reporting Frequency: Quarterly

Contact Officers

Name	Shari Hallett and Kerry Prisco
Direct Dial	01823 219425
Email	shari.hallett@somerset.gov.uk kerry.prisco@somerset.gov.uk