

# Re-inspection

# Housing

# Management

# Services

**Poole Housing Partnership Ltd (ALMO)**

Borough of Poole

September 2008



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# Arm's Length Management Organisation (ALMO) Inspections

The Audit Commission is an independent body responsible for ensuring that public money is spent economically, efficiently and effectively and delivers high-quality local services for the public.

Within the Audit Commission, the Housing Inspectorate inspects and monitors the performance of a number of bodies and services. These include local authority housing departments, local authorities administering Supporting People programmes, arm's length management organisations (ALMOs) and housing associations. Our key lines of enquiry (KLOEs) set out the main issues which we consider when forming our judgements on the quality of services. The KLOEs can be found on the Audit Commission's website at [www.audit-commission.gov.uk/housing](http://www.audit-commission.gov.uk/housing).

This inspection has been carried out by the Housing Inspectorate using powers under section 10 of the Local Government Act 1999 and is in line with the Audit Commission's strategic regulation principles. In broad terms, these principles look to minimise the burden of regulation while maximising its impact. To meet these principles this inspection:

- is proportionate to risk and the performance of the Council/ALMO;
- judges the quality of the service for service users and the value for money of the service;
- promotes further improvements in the service; and
- has cost no more than is necessary to safeguard the public interest.

This service was inspected as part of the Government's arms length housing management initiative, which encourages councils to set up ALMOs to manage, maintain and improve their housing stock. The Government decided that councils pursuing this option can secure additional capital funding if the new arms length body has received at least a 'good' rating from the Audit Commission's Housing Inspectorate.

An ALMO is a company set up by a local authority to manage and improve all or part of its housing stock. The local authority remains the landlord and tenants remain secure tenants of the authority. An ALMO does not trade for profit, and is managed by a board of directors comprising Council nominees, elected tenants/ leaseholders and independents.

The Housing Inspectorate has published additional guidance for ALMO inspections:

- 'ALMO Inspections and the delivery of excellent housing management services' (March 2003); and
- 'Learning from the first housing ALMOs' (May 2003).

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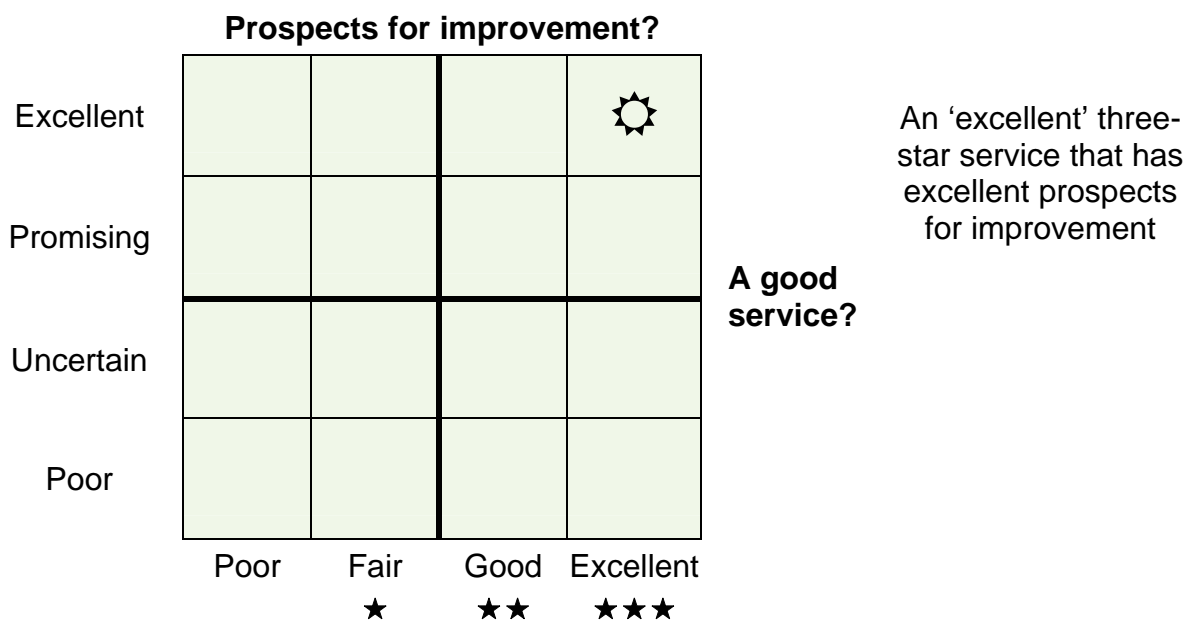
# Summary

- 1 Poole Housing Partnership (PHP) is providing an 'excellent' three star landlord service, with excellent prospects for improvement.
- 2 There are high levels of customer satisfaction with every area of service. Services are easy to access, consistently customer-focused and resident involvement is well-developed. Performance on repairs, re-letting empty homes and carrying out annual gas safety checks and disabled adaptations is strong and PHP is on track to meet the decent homes standard by 2010. Performance on income collection is strong. PHP has taken a proactive approach to building community cohesion and working with partners to address anti-social behaviour. And the overall appearance of estates is good, as is that of most communal spaces.
- 3 The leadership and culture of value for money throughout the organisation is very strong. PHP is delivering a value for money service with a high degree of cost awareness and a strong focus on delivering value for money improvements in each service.
- 4 There are some areas for improvement. These include its approach to equalities and diversity. The sheltered housing service does not yet fully meet the future needs of the population. And the strategic framework for improving value for money is an area for improvement and value for money of some recent initiatives has not been assessed.
- 5 There are excellent prospects for improvement. There is a strong track record of improvement in performance, value for money and of responding to external recommendations. Leadership by both the board and Chief Executive is strong and there is a clear longer-term vision for the service. PHP has good plans and strong performance management arrangements and remains open to learning. Capacity is also strong. Managers and staff are of a high calibre and well motivated, partnership working is well-developed and PHP makes good use of its financial resources including IT.
- 6 However, there are some barriers to improvement. The longer-term funding arrangements for the service remain unclear and while a number of strategies are strong on ambition, it is less clear how they will be achieved.

# Scoring the service

7 We have assessed Poole Housing Partnership as providing an ‘excellent’ three-star service that has excellent prospects for improvement. Our judgements are based on the evidence obtained during the inspection and are outlined below.

**Figure 1 Scoring chart<sup>1</sup>**



Source: Audit Commission

8 We found the service to be excellent because it has a range of strengths including:

- tenants express very high levels of satisfaction with all aspects of the service;
- it is easy to access services, there is high quality written information and internet access and the service is consistently customer-focused;
- performance on repairs, reletting empty homes and carrying out annual gas safety checks is strong;
- PHP remains on track to meet the 2010 deadline for all of its homes to meet its own enhanced decent homes standard;
- performance on income collection is strong;
- resident involvement is well-developed. It is clear that tenants have a real say over the policies and practices of PHP;

<sup>1</sup> The scoring chart displays performance in two dimensions. The horizontal axis shows how good the service or function is now, on a scale ranging from no stars for a service that is poor (at the left-hand end) to three stars for an excellent service (right-hand end). The vertical axis shows the improvement prospects of the service, also on a four-point scale.

- there is a particularly proactive approach to building community cohesion and tackling the root causes of anti-social behaviour, with joint working reducing its incidence where it was most prevalent;
  - the overall appearance of estates is good, as is that of most communal spaces;
  - services are tailored well to the needs of disabled tenants and increasingly for the younger population; and
  - the leadership and culture of value for money throughout the organisation is very strong. PHP is delivering a value for money service with a high degree of cost awareness and a strong focus on delivering value for money improvements in each service.
- 9 However, there are a few areas which require improvement. These include:
- PHP is not playing the leading role on diversity to which it aspires and the sheltered housing service does not yet fully meet the future needs of the population;
  - insufficient information is given to tenants on the presence or otherwise of asbestos; and
  - the strategic framework for improving value for money is an area for improvement and value for money of some recent initiatives has not been assessed.
- 10 The service has excellent prospects for improvement because:
- there is a strong track record of improvement in performance, value for money and of responding to external recommendations;
  - the quality of leadership by the board and Chief Executive is strong;
  - managers and staff are of a high calibre and well motivated;
  - PHP makes good use of its financial resources including IT and partnership working is well-developed;
  - PHP has a strong performance management culture that is apparent from its openness to learning and its performance monitoring and management arrangements;
  - the approach to financial and risk management is strong;
  - the three-year delivery plan is of a high quality and there is a clear longer-term vision for the service; and
  - there are a many plans and actions being pursued that will deliver further improvement.
- 11 However, there are some barriers to improvement. These include:
- the longer-term funding arrangements for the service remain unclear;
  - a number of strategies are strong on ambition, but it is less clear how they will be achieved; and
  - some data has been reported inaccurately until very recently, but this is being addressed.

# Recommendations

12 To rise to the challenge of continuous improvement, organisations need inspection reports that offer practical pointers for improvement. Our recommendations identify the expected benefits for both local people and the organisation. In addition, we identify the approximate costs<sup>1</sup> and indicate the priority we place on each recommendation and key dates for delivering these where they are considered appropriate. In this context, the inspection team recommends that the organisation shares the findings of this report with PHP board, the local authority and customers; and takes action to address all weaknesses identified in the report. The inspection team makes the following recommendations.

### Recommendation

**R1** Demonstrate that services are being delivered fairly to all tenants and leaseholders, by:

- collecting information on the take up of services by each group of tenants;
- assessing why some groups are more likely to take up services and others are less likely;
- implementing a plan of action to address any imbalances; and
- ensuring that equality features in the objectives of each member of staff.

The expected benefit of this recommendation is that PHP will be able to demonstrate its commitment to equality in the best possible way.

The implementation of this recommendation will have high impact with low costs. This should be implemented by April 2010.

### Recommendation

**R2** In partnership with the Borough of Poole and other stakeholders, make the best use of sheltered housing services, by:

- identifying the needs and preferences of older tenants, particularly those who are frailest, and older people seeking housing;
- agreeing the optimum mix of independent, supported and extra care sheltered housing Poole needs over the next 30 years;
- balancing these with the need for other supported housing; and
- drawing up a commissioning plan to help create a wider range of services.

The expected benefits of this recommendation are:

- a greater choice of housing solutions for older people; and
- the optimum use of resources to meet the needs of an increasingly frail community.

<sup>1</sup> Low cost is defined as less than 1 per cent of the annual service cost, medium cost is between 1 and 5 per cent and high cost is over 5 per cent.

The implementation of this recommendation will have high impact with medium costs. The revenue costs will be met out of Supporting People funding, while the capital costs will form part of the 30 year business plan and capital programme. The commissioning plan should be adopted by April 2010.

### Recommendation

**R3** Strengthen the performance management framework by:

- addressing the weaknesses in some of the plans that PHP is working to;
- introducing a systematic approach to assessing the value for money of new initiatives; and
- establishing a rolling programme of data quality checks, covering each of the 50 key indicators every five years.

The expected benefits of this recommendation are:

- stronger plans will help to maintain the current high level of performance;
- resources will be directed to best effect; and
- the Board and managers will have confidence in the quality of information used to direct and manage the service.

The implementation of this recommendation will have high impact with low costs. This should be implemented by June 2009.

### Recommendation

**R4** Improve the information that tenants receive about asbestos in the home by:

- producing one information sheet for each house type where asbestos is present and issue it to all affected tenants.

The expected benefits of this recommendation is that there will be less likelihood of tenants carrying out work which will disturb any hidden asbestos.

The implementation of this recommendation will have high impact with low costs. This should be implemented by April 2009.

- 13** We would like to thank the staff of Poole Housing Partnership who made us welcome and who met our requests efficiently and courteously.

Dates of inspection: 4 to 8 August 2008

# Report

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## Context

### The locality

- 14 The Borough of Poole is in the south-west of England. It covers an area of 65 square kilometres and borders Bournemouth to the east, the districts of Purbeck to the west and East Dorset to the north. The Borough's southern border is marked by the largest natural harbour in Europe. With Bournemouth and Christchurch, Poole comprises the second largest urbanised area in the south west behind Bristol.
- 15 The population of Poole is expected to increase by 7 per cent between 2005 and 2028, from 137,000 to 146,600. There is a relatively large proportion of older people which is increasing. Currently 40 per cent of the population are aged over 50, which is well above the national average of 33 per cent. This is expected to increase to 47 per cent by 2026. Conversely the proportion of people in the 20 to 49 age group is expected to reduce from 38 per cent to 34 per cent.
- 16 There is a low proportion of people from Black and Minority Ethnic communities. At 4 per cent it is below the average for the south west and less than a third of the national average. However the number of school-age children with a Black and Minority Ethnic background has increased from 4.9 per cent to 6.1 per cent since 2005. The largest number of people of 'non white' ethnic origin are Chinese people who comprise 0.3 per cent of the population.
- 17 The Borough has 64,032 homes. Around half were built between the mid-1960s and the early 1990s. Owner-occupation is high at 79 per cent and average house prices are among the highest in the country. In mid-2005 the average house price in Poole was £251,367 - exceeding the national average of £190,681 by 32 per cent. This figure is inflated by residential land values in Sandbanks, which are among the highest in the world.
- 18 The level of economic activity in Poole is high. Unemployment at 1 per cent of the working population is lower than both the regional (1.2 per cent) and national (2.1 per cent) averages. Average weekly earnings are £447, less than the national (£459) but higher than the regional (£428) averages<sup>1</sup>. Poole has a diverse industrial base, the major sectors being distribution and tourism (26 per cent), public administration (24 per cent) and finance and IT (21 per cent). Manufacturing makes up 15 per cent of local employment. Significant local employers include Sunseeker, Siemens and Barclays bank.

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<sup>1</sup> ONS annual survey of hours and earnings - workplace analysis 2007

- 19 Levels of deprivation in Poole are generally low. The Borough is ranked 218th<sup>1</sup> out of 354 areas nationally (where 354 is the least deprived). However, four out of 91 of Poole's super output areas<sup>2</sup> are in the 25 per cent most deprived areas in England and 9.8 per cent of the population live in low-income households. The most recent indices show that the proportion of the population experiencing income deprivation in the ward of Newtown increased from 13 per cent to 23 per cent from 2004 to 2007. Alderney remains in the worst 5 per cent nationally. Residents of these areas are more likely to experience poor health and unemployment and children are less likely to achieve good educational standards. Tackling these issues are significant challenges for the Council and its partners.

## The Council

- 20 Poole Borough Council comprises 42 councillors. The most recent elections in May 2007 resulted in the Conservative group keeping control of the Council with 25 councillors and the Liberal Democrat group of 17 councillors forming the opposition.
- 21 The Council has adopted the 'leader and cabinet' style of governance. The cabinet is made up of the Leader, Deputy Leader and seven portfolio holders from the majority group. The portfolio holder for social care and equalities has the responsibility of ensuring that 'the Council and PHP work well .... to deliver the best outcomes and value for Residents, Tenants and Leaseholders'.
- 22 The Cabinet is held to account by six Overview and Scrutiny Committees which focus on Health and Social Care; Communities; Efficiency and Effectiveness; Environment; Economy; and Children and Young People. Various other committees, including six Area Committees also operate.
- 23 The activities of the Cabinet are examined by three scrutiny committees which focus on Health, Community Support and Education and Service Provision and Audit. The Council also has a Scrutiny Committee and regulatory committees dealing with Standards, Planning and Licensing.
- 24 The Council employed 3,737 full-time equivalent people in 2007/08. Its budget provides for £278 million to for day-to-day management and service delivery. It also includes a further £20 million for capital projects. Council tax increased by 4.5 per cent in 2007/08 and the Band D charge is £1,069. This compares favourably with the unitary council average of £1,103. The average amount paid by residents is £1,173, reflecting the relatively high property values in the Borough.
- 25 The Council works in a number of partnerships. The Local Strategic Partnership (LSP) was developed in 2002 and is known as the Poole Partnership. It includes public sector organisations such as the primary care trust (PCT) and police as well as voluntary sector organisations including Age Concern and local groups representing specific interests such as the Alzheimers Society and local sports groups. The Council and its partners are currently working to deliver its Local Area Agreement (LAA) and are working with Bournemouth Council and Dorset County Council to develop a Multi-Area Agreement (MAA).

<sup>1</sup> Rank of average rank, Indices of Deprivation 2007. In 2004 Poole was ranked 224th of 354.

<sup>2</sup> This is a term introduced in 2004 by the Office of National Statistics for neighbourhoods of around 1500 population with similar characteristics; seen as longer term and more useful than electoral wards

### The service

- 26** The Council owns 4,688 homes and 1,000 garages as well as the freehold to 521 flats sold under the right to buy. The rented stock consists of 2,276 houses and bungalows, 2,091 low-rise flats and bedsits, and 314 high-rise flats and bedsits. Of these 1,285 homes are in sheltered housing. The overall supply of affordable housing in Poole is significantly lower than the national average of 12 per cent.
- 27** The Council has set up the Poole Housing Partnership (PHP), to undertake the landlord functions of its housing service for its 4,688 tenants, and 521 leaseholders. The initial agreement with PHP began in April 2004 and is for five years, with an option to renew for a further five years. The functions delegated to PHP can be summarised as:
- stock investment and repairs ordering;
  - rent collection, dealing with arrears and debt counselling;
  - estate management, caretaking and support services under Supporting People;
  - managing lettings, voids and under-occupation;
  - enforcement of tenancy conditions;
  - similar functions for leaseholders; and
  - tenant participation, information and consultation.
- 28** The functions retained by the Council include:
- housing strategy and enabling including the supporting people programme;
  - homelessness, housing advice and money advice; and
  - the administration of the housing register.
- 29** The company is managed by a board, which is made up of five tenants and leaseholders, five council nominees and five independents. The day-to-day running of the company is delegated to a senior management team, headed by a Chief Executive. Around 87 staff transferred from the council to PHP.
- 30** Key areas of spending in the 2008/09 budget are £4.3 million on management and administration, £7.8 million on repairs and maintenance and £418,000 on other costs including sheltered housing, cleaning and the right to buy. The Council itself receives income from rents of £14.9 million, which equates to an average of £61 per week, an increase of £3 a year for the past two years. Service charge income amounts to a further £1.5 million.
- 31** The capital programme amounts to £12.1 million in 2008/09. This is the year when expenditure on the decent homes programme peaks, with the budget falling to £7.7 million in 2009/10 and £5.7 million in 2010/11.

- 32 The ALMO employs a Chief Executive and five service heads. These are as follows.
- The Head of Housing Management, who has a team of 3 lettings and voids officers, 27 sheltered housing and 4 tenancy support officers, 9 estates and tenancy management staff and 2 resident involvement officers.
  - The Head of Income and Information Technology, who manages seven income collection and recovery officers, two money advisors and four IT staff.
  - The Head of Best Value and Performance, who is supported by three policy and performance officers. The team is responsible for service reviews, quality assurance, performance monitoring and benchmarking and complaints handling.
  - The Head of Technical Services, who has a team of 28 staff who are responsible for the improvement programme, repairs and maintenance, the right to buy, leasehold management and marketing.
  - The Head of Finance who is supported by two accountants and is responsible for managing the housing revenue account, ALMO accounts, statutory returns and business planning.
- 33 The service has been the subject of three previous inspections. In 2002 the repairs and maintenance service was judged to be a good service with promising prospects. In 2003 tenancy and estate management services were found to be good with uncertain prospects and in 2005 the whole service, which had been transferred to PHP, was judged to be an excellent service with promising prospects. That assessment enabled Poole to access additional Government funding to bring its homes up to the Decent Homes Standard.

# How good is the service?

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## What has the service aimed to achieve?

- 34** Improving housing for local people is one of the six top priorities of Poole Borough Council. The Council's Corporate Plan for 2007 highlighted the gap between local incomes and house prices and other causes of the high demand for affordable housing. It also identified increasing household fuel prices and the need for extra investment in some homes to help achieve the decent homes standard. Other corporate priorities in 2007 to which PHP could play a central role were the establishment of a housing and support strategy for older people, the reduction of greenhouse gas emissions, better utilisation of the Council's assets, safer neighbourhoods initiatives in three areas and a shared partnership approach.
- 35** The mission of PHP is 'working with residents to deliver quality homes in strong communities' with five strategic objectives:
- working with residents;
  - strong and sustainable communities;
  - excellent services;
  - value for money; and
  - quality homes.

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## Is the service meeting the needs of the local community and users?

### Access and customer care

- 36** In our 2005 inspection we saw access and customer care as an area of strength. Customer focus and internet access was a strength, with the quality of telephone access as an area for improvement.
- 37** In this inspection access and customer care remains an area of strength, with few weaknesses. It is easy to access services. PHP has moved to offices which are more convenient to the town centre, with a welcoming reception. The quality of written information is of a very high standard, as is internet access. The service is consistently customer-focused with customer care embedded in the culture of the service and complaints are handled well. Weaknesses exist in the guidance to staff on the use of confidential interview facilities and the search facilities on the website.

- 38** PHP has moved to a modern town centre location that is very close to shops, public transport and other amenities. Residents, including those who live outside the town centre find services easy to access. There are regular, reasonably priced bus services to Poole's central bus station, which is around 200 metres from the PHP offices. For most people living outside of Poole town centre it could be two journeys to the previous offices, while now it is one at most for all. However, unlike the Civic Centre, the PHP offices are not well signposted. This is because the Council is trying to reduce the number of signposts in the town centre. PHP is confident that this does not pose a problem because it frequently publishes and issues directions to the offices, both to tenants and other organisations such as the CAB, while residents themselves say that they do not have difficulty finding the offices. Most customers will benefit from the change of location.
- 39** The reception is welcoming and well furnished, with a public toilet and toys for children. There is a great deal of information available for tenants as well as confidential interview facilities. However, the interview facilities are not always used and it is possible to overhear sensitive discussions about rent arrears held at the counter. The new facilities will not be used to best effect if reception staff are not alert to the need for confidentiality.
- 40** Access arrangements including those outside normal working hours are customer-focused. Office hours, which are displayed on the entrance, are extended to 7pm from Monday to Thursday. Contractors and staff are also available for repairs and tenancy management issues at weekends and in the evening, in addition to out-of-hours emergencies. During daytime hours there is also the opportunity to choose from four repairs 'slots' which take account of the school run and other obligations. This reflects the high degree of customer focus to the service and reduces the risk that some tenants will be excluded.
- 41** PHP has a strong commitment to customer care and performance is strong. Staff and contractors display a very customer-focused approach when dealing with customers. It is a high corporate priority, with telephone answering, office interviews, written contact, complaints and the speed of invoice payments all among the 50 key indicators that PHP monitors. These show performance to be strong. Customer care features heavily among the job descriptions of all staff and their personal targets, with reception staff all accredited to NVQ level 2 in customer care. Contractors share this culture, with a Code of Conduct that covers most aspects of the service and the decent homes and rewiring contractor holding the 'Considerate Contractor'<sup>1</sup> award.

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<sup>1</sup> This is an industry award for organisations with high standards of customer care

## How good is the service?

- 42 Written information and contact with tenants is of a very high standard. Tenants value the wide variety of ways PHP uses to communicate with them. It is easy to find out about service standards, performance and other matters of interest from the handbook, a range of information leaflets and the excellent 'At Home' newsletter. It has a well laid out and attractive format, keeping residents informed about services, involvement opportunities, young peoples activities and initiatives, and with a separate section for leaseholder information. The 'Your Money' supplement to the latest edition of 'At Home' provides well written, attractively presented and useful advice to tenants (which would be of equal value to the wider population). It includes information on low cost gas and electricity suppliers and energy saving tips, basic bank accounts and the local credit union, sources of money advice and home contents insurance. When writing to tenants we found the tone of letters to be helpful and in plain language. A small group of tenants act as a reading panel to ensure that the documents continue to be easy to understand. All of this helps to strengthen the relationship between PHP and its customers, reflected in high degrees of overall satisfaction.
- 43 Telephone access is easy, with the extended hours of the service welcomed. Over 96 per cent of calls are answered and around 3 per cent are abandoned. Most importantly, residents and board members described the attitude of staff answering calls as friendly and helpful. Technical problems make it difficult to be certain about the actual speed of response to calls. There is a 12 second delay on calls to the helpdesk and so the actual time taken is unclear. This does not affect calls to direct line numbers, which are published in 'At Home', but the response to these calls is not monitored. PHP recognises that it needs to address this delay to maintain levels of satisfaction with this aspect of the service.
- 44 The PHP is supporting tenants to access its attractive, accessible and informative website. Tenants can pay their rent, report repairs and estate management issues, as well as submit comments on the service. Details about the board and minutes of their meetings are available and easy to access from the website. This gives residents the opportunity to see how PHP is managed by the board and increases transparency. The website link to the Poole 'homechoice' page opens up more information on housing, how to apply for it and how to obtain a transfer. The site is therefore of value to both tenants and applicants for Council housing. PHP also promotes the use of the internet through the provision of a computer link at its head office and at each of the sheltered housing common rooms. It provides free training to tenants and the benefits of this go beyond simply accessing the housing service; sheltered tenants now order home shopping, holidays and insurance services online. We found only one area for improvement and this is in the usefulness of the search facility, which was of little help in seeking out pages on, for example, resident involvement. Overall, internet access is an area of considerable strength.

- 45 A wide range of service standards have been agreed with tenants and leaseholders, to help them to assess the quality of each service. These include the most common, such as the speed of response to letters, complaints and repairs requests. But they also include standards for each service area. An example of the thought that goes into the standards is that of estate inspections: the standard is for these to be undertaken every six months, giving two week's notice and reporting back within five days. They are publicised well through the handbook, website, individual leaflets and the newsletter. The majority of standards are now challenging and being met. Customers will be better able to judge the quality of the service and provide useful feedback with the benefit of these standards.
- 46 Customer feedback is encouraged and shows high levels of satisfaction. Many opportunities are taken to obtain the views of services users, from repairs cards to ad hoc telephone surveys and annual surveys. These show satisfaction to be high and improving. In 2008, 83 per cent of tenants were satisfied or very satisfied with the overall service. As is shown later, feedback is used extensively to improve the way that services are delivered.
- 47 Complaints and compliments are managed well. In response to feedback, PHP has introduced a briefer, three-stage process that makes it easier to complain. Comments can be made verbally, in writing and via the website. The system is publicised well in 'At Home' newsletter, on the website and at customer contact points. Newsletter articles called 'You Said We Did' and the annual report show what has changed as a result. 92 per cent of responses met the reasonable ten day target time set by tenants and 75 per cent of complainants were happy with the way that their complaint was dealt with. Among the changes brought about were new policies on temporarily rehousing people when major work takes place, the quality of flooring in flats and the out of hours nuisance response. PHP has provided additional training for helpdesk staff to help them provide an immediate answer to questions and to respond individually to comments on returned repairs cards. By welcoming, learning and acting upon complaints, PHP is continuously improving.

### Diversity

- 48 In 2005 this was an area of strength, with services tailored to some groups and a clear commitment, but with weaknesses in the diversity of tenant and leaseholder representatives and among board members.
- 49 We now find that strengths continue to outweigh weaknesses. The board and staff are committed to ensuring fairness in the way that PHP delivers the service and there is an improved understanding of the tenant population. Services are tailored well to the needs of disabled tenants and increasingly for the younger population. The range of active tenants is increasingly diverse. However, PHP's commitment is not yet fully reflected in its performance management arrangements and in its contribution to the Council's work. And full impact assessments are required in order that PHP can understand whether it is delivering its services fairly to all sections of the population.

## How good is the service?

- 50** There is a commitment to addressing diversity by PHP that is being reflected in practice. An overarching diversity and equality policy states that PHP's aspirations are to ensure equality in respect of age, ethnicity, disability and sexuality. This is supported by a disability equality scheme, a race equality action plan and a domestic violence policy. In addition, PHP is beginning to adopt a strategic approach to tackling poverty with its financial inclusion plan, having already taken advantage of many of the government and local initiatives that have been established. Staff and board members have all received basic diversity awareness training, with some staff also developing more advanced skills in disability awareness. PHP has also shown some leadership by championing the cause of travellers in responding to consultations over the design of a permanent site.
- 51** Performance management does not focus sufficiently on diversity. Only two diversity indicators - the speed of minor and major adaptations - are among the 50 that are reported on. While 'deliver a customer-focused, flexible service that meets the unique needs of the various and diverse communities that we work with' features well in the main objectives of the housing officer job description, it does not feature among those of technical and income management staff. PHP will be less able to sustain its commitment to diversity if it is not fully reflected in the way that it monitors and manages its business.
- 52** PHP is not playing a leading role in supporting the Council's work on equalities. In its progress report on the Race Equality Scheme, the Council demonstrates an understanding of the local population, but does not link this to the information that it and PHP hold on the take up of services. The achievements of children's services, culture and leisure, economic development, environmental health and employment are referred to, but housing goes unmentioned. Landlord services do not feature in the revised action plan for the Council. PHP is not meeting the aspiration in its equality policy to be 'an organisation which takes the lead in equality issues' with such omissions.
- 53** PHP has an improving knowledge of the diversity of its tenants. It now has information on the age, health, incomes and communication preferences of 53 per cent of tenants and, in terms of ethnicity, it has information on 80 per cent of tenants. PHP has had limited success to date in communicating with settled travellers because this group expressed a wish to remain anonymous. It is collecting data on faith/belief and sexual orientation in the latest of its STATUS surveys. Some fairly common messages are beginning to emerge from this data, such as young people being less satisfied than older people with the service and with the tenant population generally being older and more disabled than the Poole population as a whole. The collection and analysis of information is essential if PHP is to be able to show that it is delivering its services fairly to each group of tenants.

- 54 PHP has, by contrast, little information on the take-up of different services by each group of tenants. It has carried out a full impact assessment of resident involvement and an initial 'screening' of the need to carry out assessments of its other services. But these show that full assessments are needed in every area. The full assessments are all timetabled for 2008/09, but it is questionable whether PHP will have gathered sufficient information by then to be able to say whether services are delivered fairly. The incidence and causes of poverty and intergenerational worklessness are a focus for the financial inclusion plan, but the actual scale of the problem is unclear. PHP has limited resources to directly tackle inequality and without this information it may be unable to tailor its services to the tenants who are most excluded.
- 55 Services are nonetheless designed well to meet the identified needs of specific groups. Examples include:
- Board membership and consultation mechanisms now reflect the diversity of the tenant and leaseholder population in respect of age, gender and race;
  - disabled people, who make up a high proportion of tenants, are well served. They are represented in all working parties and have a disability forum looking after their interests. The PHP office is wheelchair accessible, welcome attendance dogs, have accessible toilets, a hearing loop and parking spaces for disabled people adjacent to the entrance. A special edition of 'At Home' is targeted at disabled tenants and their carers. The identification of tenants needing adaptations and the way that the service is managed is excellent. There is also an in-house tenancy support service, a handyperson service and a strong link to the Poole Intermediate Care service, all of which improves the quality of life of disabled tenants;
  - tenants can request services to be provided by male or female staff if they feel more comfortable discussing their circumstances in this way. Clauses on harassment, domestic violence and rude or offensive behaviour and harassment on the grounds of race, sexuality, ethnicity and belief are specifically mentioned in the tenancy agreement;
  - PHP's community development work (discussed in more detail in the section on estate management) is engaging more younger people and developing more local facilities such as multi-use games areas. There is a youth representative on the PHP board and a youth editorial team for special editions of 'At Home';
  - the website has direct links enabling the translation of the content on screen and there is a language register which lists PHP and Council staff with foreign language skills. The website that has been validated against an industry standard for access and has a 'spoken text' service and text enlargement making it accessible to more users. Information leaflets and newsletters contain strap lines advising that they can be provided in community languages, Braille or other formats. However PHP makes the common mistake of not stating what the subject matter of each leaflet is and so residents will not know whether it will be of value; and

## How good is the service?

- other services targeted at vulnerable tenants include a system of flags on the IT system to identify tenants who may, for example, have hearing difficulties and take time to answer the door. Part of the repairs contract specifies the employment of a tenant liaison officer being employed to assist with more complicated issues and more vulnerable tenants, as well as resolve complaints. While this is common in planned maintenance contracts it is unusual in respect of routine repairs.

This shows that, although the framework for addressing diversity and inequality is not yet in place, there is an enthusiasm within the organisation to address the needs of all residents. The completion of the full impact assessments will identify what more needs to be done and will help to target resources to best effect.

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## Stock investment and asset management

### Capital improvement, planned and cyclical maintenance

- 56** In 2005 strengths outweighed weaknesses. We praised the scale and quality of improvement work taking place, in addition to the information and choices available to tenants. PHP was on track to meet the decent homes standard, as well as having a local 'Poole Standard'.
- 57** This continues to be an area in which strengths outweigh weaknesses. Tenant involvement is strong and the programme is based on good information and delivered in a customer-focused way, leading to very high levels of tenant satisfaction. There is an emphasis on value for money and the use of high quality components with greater emphasis upon sustainability and renewable energy. PHP remains on track to meet the 2010 deadline for all of its homes to meet its own enhanced decent homes standard. Council-owned garages for which demand is high have all been improved, while those in low demand have been demolished. The safety of tenants is being improved through planned and cyclical work. However, the asset management plan is in need of updating and the quality of information to tenants on the presence of asbestos is limited.
- 58** A remarkable 98 per cent of tenants have been satisfied with the quality of major repairs and planned maintenance work to their homes. This level of satisfaction is reflected in other areas: in the current year, 96 per cent of tenants were satisfied with the quality of painting and pre-painting repairs work. Tenants also expressed high levels of satisfaction with the process and the quality of rewiring schemes.

- 59 Tenant involvement is strong and the programme is delivered in a customer-focused way. The reinvestment panel gives a real voice to tenants in the way in which the programme is carried out and in the interviewing and selection of contractors. An investment special newsletter goes out annually to all tenants and details the programme. Tenants are given choice over when work will start and finish and contractors take account of personal circumstances, such as collecting children from school or working hours. Choices of finishes and layouts are given to each tenant. This extends to the production of three dimensional pictures of the proposals as well as high quality brochures showing the choice of materials and colours. In sheltered schemes, coffee mornings are set up so that presentations can be made to all residents. Resident Liaison Officers maintain contact during the progress of works. The choices made by tenants over colour and style are monitored and new options have been introduced where there is low take up of a particular option. On completion, PHP officers encourage the residents to jointly carry out the handover inspection and agree any defects. This is an aspect of the service that tenants have control over from the beginning to the end.
- 60 The current programme itself is based upon good quality data. Through a process of targeted surveys and feedback from other surveys prior to capital works, PHP has comprehensive information on 42 per cent of the stock. This data is shared and updated electronically as a result of the integration of the responsive repairs, planned maintenance and stock databases. While it originally planned to survey all of the stock, this is not now felt necessary as current information indicates that 'cloned' data is proving accurate. This has been further confirmed through two validation exercises carried out by consultants. Accurate information helps to ensure that the programme is organised and procured in the most cost-effective way.
- 61 The way in which the work is currently organised is achieving value for money. Tenants have agreed upon a programme organised primarily on the basis of an 'elemental' approach, allowing larger rolling contracts to be entered into. Any adaptations work that has been identified (often as part of the consultation process) is integrated into the programme, rather than as a more expensive one-off order. Where properties have been identified as being in relatively low demand, work has been deferred or, as in the case of garages, the properties have been demolished to make way for environmental improvements or redevelopment.
- 62 The Poole decent homes standard is more comprehensive than the national decent homes standard. It covers all of the factors encompassed by the national definition. As well as providing a reasonable degree of thermal comfort and no serious health and safety hazards, the Poole standard requires both 'key' and 'other' building components to be fit for purpose and for 'all' facilities and services to be of a modern standard. Tenants have a choice of very high quality components, completed to a high standard. For example, kitchen units have well-constructed doors and drawer fronts, with fully rotating hinges to reduce breakage. Kitchens and bathrooms are fully redecorated, with high quality floor finishes and mechanical air extraction systems. Tenants are pleased with the range of choices that they are offered in terms of tiling, floor covering and fitted units.

## How good is the service?

- 63 One weakness that PHP has not fully addressed is the limited number of tenants who have been involved in setting and developing the Poole standard. We could find no evidence that tenants had been given the choice of additional components, such as providing showers in every bathroom instead of the comprehensive approach to the national standard, described above. The high levels of satisfaction suggest that this is not a major weakness.
- 64 PHP remains on track to meet the 2010 deadline for all of its homes to meet the decent homes standard. While 44 per cent of homes fell short of this standard on 31 March 2008, the figure is reducing rapidly and in September 2008 stands at 25 per cent. There is a £12 million programme in the current year and PHP is able to demonstrate a work programme profile involving in many cases relatively minor jobs, which will enable them to meet the standard by 2010. All windows and doors have been modernised, while the bathroom and kitchen replacement programme is near to completion. The degree of comfort that tenants enjoy in their homes is much improved as a result.
- 65 The improvement in house conditions has resulted in a similar improvement in the energy efficiency (SAP) rating of the housing stock. This has increased to 75, compared with the figure of 58 in 2004. At the same time PHP is piloting a number of approaches to renewable energy including the use of air to water heat pumps, a central biomass boiler, solar panels, photovoltaic lighting and 'smart energy meters'. These changes are of particular importance given the major increases in energy costs and help to reduce the incidence of fuel poverty.
- 66 The pre-cast reinforced concrete stock of 85 homes has a reasonable life expectancy. Advice from consultants confirms that, apart from some relatively minor remedial works to the floor slab and the roof structure, the properties will provide a minimum of a 30-year life. These defects are being monitored and works are being programmed in to coincide with the capital works programme.
- 67 The garages in the ownership of the Council are in good condition. Those that were in low demand have been demolished to make way for general parking areas and the next stage of this work is to carry out environmental improvements to these areas. The remaining garages have been subject to an improvement programme which is well under way.
- 68 Planned and cyclical work is enhancing the safety of PHP's homes. A hard wired smoke alarm system is installed whenever homes are rewired. The rewiring programme is running at 250 properties per year and so the programme will be completed by 2024. For those properties which do not yet require rewiring, light socket 'plug in' electrical appliances have been installed. The gas servicing contractor carries out an annual test of all smoke and heat detectors alongside annual gas servicing or as a stand alone test where gas is not installed. We also found the fire safety checks to be up to date in sheltered housing.

- 69** The asset management plan does not yet take account of the relatively low demand for a small number of less popular properties and sites for which redevelopment may be the most sensible option. The design and demand for some sheltered housing is discussed in more detail in the section on supported housing. The future of each scheme is the subject of the options appraisal, but until this has been completed only essential repairs will be carried out. There are also a number of former garage sites whose future is uncertain. Both of these assets may provide an important source of funding for decent homes, but at present the position is uncertain.
- 70** While contractors are well trained in the identification and precautions necessary for asbestos, tenants are not so well informed. PHP has funded training for all contractor staff and the largest contractor has its own training programme. Only trained staff are permitted to carry out work where asbestos is present. The likely presence of asbestos is flagged up on the repairs orders and operatives are required to acknowledge this before reading details of the work requested. However tenants are not so well informed. Advice on asbestos has been issued via 'At Home' but is not included in the repairs handbook and tenants are not told where in their homes it is likely to be located, if at all. Some precautions have been taken, such as the closing up of hall cupboards where it is known to be located, but we found an instance of a tenant opening up a cupboard without being aware of the risk involved. In this respect PHP is not doing enough to minimise the health risks to tenants.

### Responsive repairs

- 71** Strengths outweighed weaknesses in 2005. Responsive repairs were carried out efficiently and effectively. The service was easily accessible and customer satisfaction was high. However the appointments system did not operate effectively and work was not prioritised consistently.
- 72** This is now an area of considerable strength. The level of customer satisfaction remains very high and there is a very strong focus on value for money and customer care. Repairs are completed quickly to a high standard and mostly in a single visit. The appointments system now works effectively and efficiently.
- 73** Customer satisfaction with the repairs service is very high. Ninety eight per cent of tenants expressed satisfaction with the repairs service in 2007/08. Post-inspections support this; this quality control check rates each job using measures in relation to the quality of work, customer satisfaction, a range of customer focus issues (such as appointments being kept and work completed at first visit) and the accuracy of the payment invoice. The most recent quarterly report gives an average score of 94 per cent against these criteria.

## How good is the service?

- 74** There is a very strong focus on customer care, with a very effective appointments system. The majority of repairs are ordered through the Helpdesk freephone, which operates from 8:30 am to 7:00 pm. Four appointment slots are offered which take account of the school run and include Saturday working. Almost every appointment made is kept, placing PHP third out of 42 ALMOs. Reminder telephone calls and texting are both used to ensure that tenants do not miss the appointment. Residents are now entitled to receive £10 in compensation, should the contractor fail to keep an appointment, though this is so rare that no payments have been made to date. Feedback on the repairs service is gathered through 'exit' satisfaction surveys and a number of panels including tenant and leaseholders' panels and conferences.
- 75** Repairs are well diagnosed and ordered. The repairs handbook is an informative and well presented document which is easy to read and locate information in. It sets out clearly the responsibilities of the tenants and the Council. It contains a section giving diagrammatic assistance to tenants to help them identify and accurately describe defects and repairs. However, although the handbook states that the service is enhanced for sheltered and vulnerable tenants, it does not explain what this means. A lack of clarity increases the risk of inconsistency, for example around the level of priority given to specific repairs.
- 76** Nearly nine out of ten of repairs are completed in one call. Helpdesk operators are trained to help diagnose and allocate the right amount of time to each repairs job, using the 'Optitime' appointments and work scheduling tool. This is made easier by a simplified schedule of rates and by contractors being given the power to carry out additional related work up to a value of £100 without the need for a variation order. Fewer repairs now require a pre-inspection, with only 5 per cent of orders require a variation for work costing over £100. The effective reporting and completion of repairs minimises the inconvenience to tenants, reduces the cost of repeat calls and contributes to the high level of satisfaction.
- 77** The speed with which all forms of repair are completed has continued to improve and places PHP among the very best in the country. The figures below indicate the performance and how the service compared with that offered by other ALMOs in a benchmarking exercise:
- emergency repairs completed on time: 99.1 per cent (sixth out of 35);
  - urgent repairs completed within Government time limits: 99 per cent (ninth out of 49); and
  - routine repairs completed on time: 99.4 per cent (second out of 35).
- These indicators are even more impressive when the actual times are considered; for routine repairs the target was 20 days, but the average time taken is only 12 days.
- 78** Frailer tenants benefit from a handyperson service. In 2007/08 the service completed 1,325 jobs for older or disabled tenants who could not carry out minor jobs or call upon others for support. This service is of particular benefit to isolated older people and contributes to their quality of life.

- 79** The service provides value for money. The contractor's staff are empowered to carry out additional related works up to the value of £100 or to contact PHP when on site if the works required are over and above that requested. Although this has increased the average cost of each repair, it has reduced the number of jobs per property to under two a year, the best in the benchmarking club, and the average repairs spending per home is correspondingly low. In addition to this the proportion of planned to responsive repairs is very high at 90:10. This means that there are fewer costly responsive repairs, directly as a result of the planned investment programme. As a result of re-tendering and a strong partnership between PHP and the present contractor, the number of post-inspections has fallen. The sampling of work being post-inspected is now more sophisticated and, as has already been shown, the results have been so positive that the need for these inspections has reduced.

### Repairs to empty homes

- 80** This was an area of weakness in 2005. Homes were not let to a high standard and in spite of this the work took a relatively long time. However tenants expressed satisfaction with their new homes and benefited from useful information.
- 81** This is now an area of considerable strength. PHP is managing to repair homes very speedily, at relatively low cost and to the satisfaction of new tenants.
- 82** The time taken to relet empty homes is among the best nationally. In 2007/08 the performance was 12 days, which was the best of 56 in the ALMO benchmarking club. It is also in the best 25 per cent when compared with other Councils in England. This is a particularly notable improvement on the situation in 2005 when the average time was 54 days. This means that the income to the service has increased by approximately £150,000 a year simply by managing this service more effectively.
- 83** The average cost of refurbishing a home is low at £850. The void standard has been adopted in consultation with tenants and is of a reasonable standard. The reinvestment board decided not to carry out decent homes work to empty homes unless a component is beyond reasonable repair, since this was felt to be unfair to existing tenants. A modest level of decoration vouchers is offered as necessary, starting at £100 for one bedroom accommodation and with some flexibility for small additional increases. Decoration is undertaken to all sheltered housing and for vulnerable people without a support network and this is the main reason why repairs to sheltered housing cost on average more than they do in general needs accommodation.
- 84** A high proportion of incoming tenants expressed satisfaction with their new homes in 2007/08. Eighty eight per cent of new tenants were satisfied with the overall process and some credit for this (and the time taken to relet each home) must be shared with the lettings service, which is discussed later. Tenants are provided with an information pack that contains gas and electricity safety certificates and manufacturers leaflets, as well as a 'welcome pack'. This all helps to provide a positive first impression of PHP as a landlord.

## How good is the service?

### Gas servicing

- 85** Performance on gas safety was strong in 2005. All of the Council's homes had received a safety check although the degree of coordination with other services to enable access was not as effective as it could have been.
- 86** This remains an area of strength. Previously undetected weaknesses in the management of gas safety have been addressed and almost every home has an up to date gas safety certificate. The management arrangements are effective and where these are at risk of failing PHP is prepared to take legal action. The quality of the checks is assured, tenants' own appliances are covered and the service is being offered to leaseholders.
- 87** PHP has addressed weaknesses in its management of gas servicing. Until the current year, it had been requiring its contractor to begin the servicing process in the same month as the expiry of the previous service. This meant that, due to access difficulties, a significant number of properties were being serviced several weeks after the expiry of the previous service. Because its systems were organised around completion of the service in this way, it has been reporting completed services to the board, rather than the number of services completed within 12 months. However, since the introduction of a ten month cycle in February 2008, this issue has been addressed. This shows that PHP is complying with its statutory duty to make all reasonable attempts to carry out gas safety checks within a 12 month cycle.
- 88** PHP has an effective gas servicing policy. It allocates appropriate responsibility to the contractor and PHP and prescribes a good range of potential actions and a reasonable balance between a formal and more informal approach. The policy does not currently prescribe 'shut-down' devices; however, it is intended that five devices will be trialled this year where there have been repeated access problems. The gas servicing procedure is adhered to and PHP will take formal action where it is appropriate. For example, since 2007, 16 notices of seeking possession and 4 injunctions have been actioned for failure to provide access for gas servicing.
- 89** There are some good practices in place to ensure that access is provided for gas servicing. For example, gas servicing appointments are offered during evenings and Saturday mornings in appropriate circumstances. The contractor is currently placing stickers on front doors where it has made an unsuccessful attempt to carry out the service. In addition, all letters sent to occupiers requesting access have stickers placed on the envelope stating that this is important correspondence.
- 90** Quality assurance processes are satisfactory. PHP commissioned CORGI<sup>1</sup> to carry out a comprehensive audit of the contractor's work in 2005. The outcome from this exercise gave PHP assurance. In addition PHP also commissions a consultant to carry out regular checks of around 70 services a year. Our confidence in the quality of the work is supported by CORGI awarding PHP's contractor the second best rating in the south of England.

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<sup>1</sup> CORGI is the acronym for the Confederation of Registered Gas Installers, who provide quality assurance of this service

- 91 PHP maintain a record of all situations where tenants have purchased and installed open gas fires. Initially attempts are made to persuade the tenant to remove the appliance but PHP will 'adopt' the servicing responsibility if the appliance is suitable. The gas servicing contractor is required to report on any tenant-purchased appliances identified during the service and this ensures that the records are kept up to date. These fires are removed when the property becomes empty.
- 92 PHP has arranged with the gas contractor to offer discounted gas servicing to leaseholders; letters have been sent to all 420 leaseholders offering this service. While not a legal requirement this shows that PHP is as concerned to assure the safety of its leaseholders as it is of its tenants.

### Aids and adaptations

- 93 This was an area of weakness in 2005. Disabled tenants had to wait excessive periods of time to obtain major adaptation work. However aids and minor adaptations were provided speedily and tenants had access to good information on the service.
- 94 This is now an area of strength. Disabled people have an important influence on the service as a whole. Work on decent homes is improving access to the service. Increased levels of funding and the secondment of an Occupational Therapist from Poole Council's Adult Social Services team have resulted in both minor and major adaptations being completed in a relatively short period of time.
- 95 PHP consults and informs disabled people very effectively. As well as running a residents' focus on disability group, PHP supports the Disability Information Team (a group of residents who provide support and advice to disabled residents). Services for disabled people feature regularly in the 'At Home' newsletter. Tenants are provided with an indication of waiting times and that contact is made with them at least every three months to keep them informed of progress. This all helps to raise the profile and awareness of the service.
- 96 Adaptations are integrated well into the decent homes contract. The need for adaptations is identified at the initial survey stage of the decent homes programme. In appropriate circumstances, adaptations are incorporated into the new kitchen or bathroom installation works. This ensures that the cost of adaptations is minimised and also helps to identify disabled tenants who are not known to other agencies.
- 97 The service is well resourced. The budget for adaptations has recently been increased from £310,000 to £500,000 to ensure that adaptations can be integrated into the decent homes programme. In addition PHP pay for the services of an Occupational Therapist seconded from the social services team. The Occupational Therapist also helps speed up assessments for tenants outside of the decent homes programme. This means that there is no waiting list for adaptations.

## How good is the service?

**98** Adaptations are carried out quickly. The OT service has a challenging target to make assessments within 14 days (the national target is 28 days) and achieves this over 90 per cent of the time. For very minor work the Occupational Therapist assessment liaises directly with the contractor and these are carried out on average in less than five days. For other minor works the average completion time is below 12 days. Major adaptations are also carried out relatively quickly. Since the 2005 inspection the time taken has fallen to around eight months on average and in the past six months it has fallen to five months on average. PHP is responding very effectively in this way to the age and frailty of the population that it serves and this is reflected in very high satisfaction levels among recipients of the service.

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## Income Management

- 99** This was an area of strength in 2005. Rent and service charge collection levels were high and the service had a strong customer focus, with effective debt advice services. Rent accounting systems and arrears recovery processes worked well. However the IT system did not allow for different debts to be recorded separately.
- 100** This is now an area of strength. The service is easily accessible and collection rates are very high for both rent and other charges. There is a strong emphasis upon arrears prevention, as a result of which arrears recovery is high and, importantly, PHP has to resort to very few notices of seeking possession or evictions. Money advice agencies and a credit union are helping to support this work.
- 101** Income collection services are easily accessible. Tenants can choose from a wide range of payment options, with 44 per cent paying by direct debit and a further 40 per cent by a payment card. These are the two most cost effective means of collection and PHP has encouraged the use of direct debit through the newsletter and other means. A small number of tenants continue to use the most expensive payment method, which is the cash office managed by the Council. PHP is currently renegotiating its contract for this to move from a fixed fee, regardless of how many tenants pay this way, to a better value unit charge.
- 102** Income collection performance is excellent. Levels of rent collection are over 99 per cent, placing the Council at the top of its nearest neighbours and in the best 25 per cent nationally. The leasehold service charge collection rate, at 106 per cent, is also very successful. The account is £150,000 in credit and the highest amount owed at the end of July was £500, with only 17 leaseholders owing more than £100. The collection rate for garage rentals is very high, with the account actually in credit at the end of July 2008 due to the number of advance payments. Only ten garage tenants owed more than £100. The rate for rechargeable repairs is the only area of weakness. While tenants are required to pay in advance for any non-urgent work, PHP is only collecting 26 per cent of the amount owed for other work. However the overall picture is that PHP can rely upon a very high level of income to fund its services.

- 103** A preventive, early intervention approach with partners is working very effectively. The rent arrears policy and procedures places the emphasis upon early intervention, with both the 'sign up' arrangements and new tenant visits being used to reinforce the importance of rent payment and money advice. Financial advice is also featured in a special edition of 'At Home'. This covers a number of elements including basic banking, the Credit Union, low cost insurance, accessing low cost energy supply and maximising benefit entitlement. Money advice services are publicised regularly via the newsletter, posters and public events such as the Respect Festival (see paragraph 114). There is a Citizens Advice Bureau surgery held twice a week in the Tenants Resource Centre, paid for by PHP. This service is estimated to have increased tenants' income by £65,000, in addition to attracting lump sums amounting to £9,000, all of which is several times what the service costs to host. It has also reduced the amount of debt owed by those referred to the service by 10 per cent. Poole is also well served by other money advice agencies and the Coastal Credit Union. Early intervention and good advice is recognised as best practice in this area.
- 104** A flexible and imaginative approach is taken to arrears recovery. Housing officers regularly call outside of normal hours and use methods such as texting to make early contact with tenants. For leaseholders the use of a letter advising that the next step will be to contact the mortgage company has been particularly effective. For rechargeable repairs only essential work is completed prior to payment and there is a 25 per cent discount for payment within 28 days, plus an extra 10 per cent discount for PHP Plus members. It has negotiated a 'no win, no fee' contract with credit agencies and has drawn in external funding to fund a financial inclusion post. Flexibility helps to ensure that arrears collection is effective.
- 105** PHP works well in partnership with the Borough Council on debt recovery. The Council's corporate collection and debt recovery policy also emphasises prevention and early intervention. Nonetheless there is a specific intention to distinguish between people in need of money advice and 'deliberate non-payers'. The policy also emphasises the importance of a human touch to ensure that those in debt feel comfortable approaching the Council and its agents. It also prioritises debts, with those that risk the loss of home at the top and above other debts that may be owed to the Council, such as housing benefit overpayments and parking fines. We found that the policy works well in practice, with the Council being prepared to reduce its own debt repayment agreements in order that rent arrears are given the highest priority.
- 106** The impact of the overall approach is that the number of evictions undertaken and notices issued are both very low. Only 29 of the 4,600 tenants have court costs awarded against them at present. The amount written off at 0.32 per cent of the debit is relatively low and this also indicates that every opportunity is used to prevent eviction action and chase debts.

## How good is the service?

**107** The degree of partnership working with the Housing Benefits service is generally positive, but has some areas for improvement. Housing officers have direct access to the benefits system so can track claims and assist tenants on this. A benefits take-up campaign has resulted in £2 million in additional benefits being awarded, to the wider community, including PHP tenants. However, the service has been slow to undertake its commitment to provide benefit verification work on behalf of the Council and performance on the processing of benefit claims has been mixed. Where the Council experiences delays in processing benefit claims there is a risk that rent arrears will be generated without tenants being aware of it.

## Resident Involvement

- 108** There was a balance of strengths and weaknesses in this area in 2005. Consultation did not reflect the views of the wider body of tenants. The ALMO lacked a resident participation strategy and progress on it had been slow. However, informal consultation arrangements were developing alongside tenants' groups that focussed on specific problem areas.
- 109** This is now an area of strength. Resident involvement is a top priority, supported by a high quality compact and involvement strategy. The strategy is backed up by a tripling of resources and this has resulted in a major increase in the opportunities that tenants have to express their views, notably in informal ways. This is improving the diversity of active tenants. It is clear that tenants have a real say over the policies and practices of PHP.
- 110** There is strong leadership and a real commitment to resident involvement. 'Working with residents' is the first of the five overall objectives of PHP. A revised compact and resident involvement strategy together contain a powerful set of aims and objectives, promoting 21 ways of getting involved and establishing clear standards both for PHP and residents. A shortened version has been supplied to all tenants and is included within the new tenants' pack. This is backed up by robust monitoring arrangements, with resident involvement being one of the five sub-committees of the ALMO. Participation is one of the competencies required of all staff and residents are described as 'being involved on a daily basis and seen as part of the team'. It was clear to us that participation is central to the culture of PHP.
- 111** Investment in resident involvement has tripled in the past three years. In 2005/06 the budget for this service amounted to £34,000, and in 2007/08 it stands at £104,000. This figure includes the cost of a dedicated member of staff, other staff time and £43,000 in expenditure on meetings, grants to recognised groups and payment of out of pocket expenses. There is a Tenants' Resource Centre located alongside the reception, with word processing, internet, printing, photo-copying and meeting facilities. Indirectly other members of staff contribute a significant proportion of their own time to ensuring that PHP is delivering the services that residents need in the way that suits them best.
- 112** PHP is building the capacity of tenant representatives through membership of groups such as TPAS and tailored training for representatives, residents' groups and individuals, including joint training with staff. This takes time, but well informed tenants can help to challenge and drive up performance.

- 113** There are many formal opportunities for participation. Tenants are represented on the board and its minutes are easy to access from the website. There are 13 consultative panels and small groups to which tenants can contribute. The housing strategy panel offers tenant representatives a direct say in policy decisions. The panel is well chaired and conducted in a friendly, informal manner, while ensuring that any decision is clearly recorded. Other panels include the reinvestment panel which, as has previously been discussed, monitors and manages the decent homes and planned maintenance programme; a Sheltered Housing Panel; a Leaseholders' Panel and a Readers' Panel. The Service Improvement Review Board involves residents, board members and officers overseeing service reviews, monitoring improvement plans and progressing quality initiatives.
- 114** The most important change since 2005 has been in the growth of informal opportunities for involvement. Some examples of these are listed below.
- The Respect Festival is an excellent example of informal resident participation. The event is now held annually at the centrally located Poole speedway stadium and is well publicised, with a range of entertainment to entice residents in. Around 640 residents attended the last event, along with 40 businesses, voluntary groups and statutory agencies. Sponsorship was used to meet the cost of hiring the stadium and most of the expenses for the day.<sup>1</sup>
  - Coffee mornings are used to consult with users of the tenancy support service. This is a relaxed way of engaging with some of the hardest to reach tenants.
  - A 'People's Panel' of 87 residents is surveyed four times a year on a variety of topics, including service standards, perceptions of anti-social behaviour and the use of direct debit.
  - The ALMO has taken a 'planning for real' approach to improvements on the Alderney estate. It invited local residents to a community centre and asked them to produce a shopping list of improvements that they would like to see. The tenants were then involved in designing the improvements and one tenant has been recruited as a resident representative.
  - Satisfaction surveys are used extensively to obtain views on how each service can improve. The most recent STATUS survey included questions that tenants themselves suggested. At the Respect Festival, one survey focused on the quality of estates and while 74 per cent graded their estates as excellent or good it has led, for example, to a change in the way that grounds maintenance is monitored and managed.
  - The 'At Home' newsletter uses every opportunity to consult residents and encourage them to get involved. There is now a youth editorial panel which has produced a special edition to help attract the interest of the youngest residents.
- 115** The most important impact of the new approach has been a further increase in satisfaction with opportunities to participate. This has risen from a well below average figure of 52 per cent satisfaction in 2005/06 to a well above average figure of 71 per cent in 2006/07.

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<sup>1</sup> The Respect Festivals are described in more detail in the appendix on positive practice

## How good is the service?

**116** Furthermore, the diversity of active tenants is now more representative of the population. The equality impact assessment of resident participation showed that there were around 170 'active' tenants, varying from those who take part in occasional panel surveys to those who sit on the board. While older and disabled tenants remain the group with most representation (reflecting the average age of the tenant population and the high proportion of sheltered housing), they are no longer over-represented. At 60, the average age of tenant representatives now matches that of the tenant population. Informal consultation methods, such as the People's Panel are helping to engage younger tenants. PHP also believes that it is engaging the small Black and Minority Ethnic population, but this is not so apparent from the impact assessment, since a large proportion of residents are reluctant to declare their ethnicity. At the board level there is a good spread of ages, genders and ethnicity. This will all help to ensure that the decisions that PHP makes are sensitive to the needs of all tenants and leaseholders.

**117** The impact of resident involvement is apparent in each area of PHP's activity. At the highest level.

- Active tenants have had a direct impact on the policy and practice of PHP. These include changes to the tenancy agreement and estate improvements. All policy matters are approved by the Housing Strategy Panel. These have included the compact and involvement strategy itself, policies on neighbourhood improvement, recharges, property disposal and the garage asset management plan.
- Tenants have a high degree of influence over the £1.75 million decent homes budget through the reinvestment panel. Tenants were involved in decisions that led to the adoption of the Poole Standard and the delivery plan for the decent homes programme. The specification for the works was considered by the reinvestment panel and standards agreed. The delivery plan based on the elemental approach was also determined by the panel.
- PHP consulted on the use of introductory tenancies and tenants said that they did not want to 'start people off on an unfair footing when they are most vulnerable', as a result of which these have not been introduced.

**118** At an operational level tenants are equally as influential.

- The People's Panel survey resulted in a choice of dates when direct debit deductions are made and in service standards for resident involvement.
- The Response Repairs Panel agreed the response times for each category of repair and decided between evening and weekend repairs appointments.
- For the responsive repairs contract tenants were involved in developing the specification and in contractor interviews.
- For the lift contract advertisements inviting tenants and leaseholder to take part were placed in the blocks where lifts are present and a presentation was made to tenants resulting in valuable feedback which fed into the specification. Tenants were invited, but did not want to be involved in the interviews themselves.

- A tenant board member was involved in the interview panel for Head of Housing Management post in November 2007 and all tenant representatives were invited to lunch with all candidates for this post. Tenants have been involved in the selection of all other front line positions, which in 2008 included Housing Officers, the Estate Services Manager and Resident Involvement Officers.

Tenants and leaseholders can therefore have confidence that their involvement will be welcomed and their views taken seriously. This helps to explain the high levels of satisfaction with this service and the service as a whole.

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## Tenancy and Estate Management

### Allocations and Lettings

- 119** There were both strengths and weaknesses in this area in 2005. The choice based lettings system<sup>1</sup> was one of the first to operate in the country and the issue of how vulnerable people have fair access to it had been addressed. New tenants expressed satisfaction with the lettings process and refusal rates were low. However there had been an increase in the time that homes lay empty.
- 120** Strengths now significantly outweigh weaknesses. The choice-based lettings scheme is now well established and the delay that it was causing in letting times has been addressed. New tenants are satisfied with the process. PHP no longer issues temporary tenancies and the arrangements for transfers and exchanges work well. There have been some delays in visits to new tenants, but this is being addressed.
- 121** The choice based lettings system operates very effectively. Prior to the creation of PHP, the housing team played an important role in the piloting of the choice-based lettings service. This was established four years ago as one of the first such schemes in the country. It is impressive that the Council and its landlord service was able to lead this project, at the same time as it was creating PHP; itself a major project. The scheme is now being extended out to the rest of Dorset in time to enable Poole's neighbours to meet the government's 2010 deadline. These Councils will be able to benefit from the way that PHP and the Council have addressed the initial delays in letting property. This was achieved by more prompt advertising, better information to applicants and the employment of a dedicated lettings officer. The fact that homes can be relet in 12 days on average under a choice-based lettings system is an important message for Councils who are only just starting to establish such schemes.

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<sup>1</sup> Choice Based Lettings is a system whereby people in need of housing are usually 'banded' according to local priorities and must then 'bid' for homes as they become available. This makes the allocation of housing easier to understand and ensures that people are housed where they would most prefer to live. The approach is being promoted by the Government, who want to see every local authority allocate its housing in this way.

## How good is the service?

- 122** The arrangements for letting accommodation are customer-focused. There are accompanied viewings in which any outstanding work is discussed. A full explanation of the rights and responsibilities of being a tenant are explained in detail as part of the sign up process. As has already been noted, incoming tenants are provided with a range of useful information and decoration vouchers are offered where appropriate. PHP has a sensitive lettings policy for areas with a history of anti-social behaviour and there is a constructive relationship with the Council, who are prepared to take account of this on the few occasions that it is needed. The use of temporary tenancies for homeless families over long periods of time has now ceased. This all helps to provide a friendly welcome to the incoming tenant.
- 123** Transfers and exchanges work well. There is an incentive scheme to encourage tenants to move to smaller accommodation and this has released 24 properties, with expenditure of £20,000 in the past year. PHP also has an effective system for management transfers on the (relatively rare) occasions when the need arises. Tenants also have improved access to exchanges, thanks to the internet-based homeswapper service pages and around 17 exchanges a month take place. Easy access to transfers and exchanges is helping PHP to make best use of its housing stock as well as meet residents' needs.

## Tenancy management

- 124** This was a strong area of performance in 2005. There were effective sign-up arrangements and a range of ways of addressing anti-social behaviour, including joint working and support for vulnerable tenants.
- 125** This remains an area of strength. There is a modern tenancy agreement, the contents of which are explained as part of the sign-up arrangements. PHP is signed up to the Respect Standard and continues to use a range of approaches to address anti-social behaviour. There is a particularly proactive approach to building community cohesion and tackling the root causes of anti-social behaviour and joint working has reduced its incidence where it was most prevalent.
- 126** Tenancy conditions were reviewed and updated in August 2008, following extensive consultation. They are written in plain language and are based upon good practice and legal advice. The tenancy agreement highlights the responsibility of each tenant, their household and visitors not to commit anti-social behaviour. Clauses on domestic violence and rude or offensive behaviour exist and harassment on the grounds of race, sexuality, ethnicity and belief is specifically mentioned. The repair obligations are more clearly defined, as is the requirement to allow access for gas and electrical safety inspections. Past experiences of neighbour disputes has led to the requirement for ground floor tenants to allow window cleaners to be able to clean upstairs windows. These conditions strengthen PHP's ability to address tenancy issues, while emphasising that they will be interpreted reasonably.
- 127** This is backed up by clear guidance to staff and tenants on how hate crime will be addressed. A professionally designed anti-social behaviour leaflet defines hate crime and the standard of service that victims can expect from PHP. The Poole Safe Together partnership has produced a 'prejudice reporting' support pack for staff of each public sector agency, which includes contact details for local organisations.

- 128** A wide range of approaches are taken to help resolve anti-social behaviour. Between April 2005 and March 2008 it took action against 59 tenants, including 16 notices of seeking possession, 4 acceptable behaviour contracts, 1 ASBO and 1 eviction. Alongside this were two attempts at mediation and the use of the tenancy support service for 12 vulnerable victims and 23 perpetrators. This has led to some positive outcomes with unsocial activity ceasing in most instances, although this is not an aspect of the service that is monitored systematically. By tailoring the response to the individual circumstances in this way, PHP is more likely to achieve a positive solution.
- 129** Joint working is helping to transform the lives of residents. PHP is signed up to a joint community safety strategy and is a key member of the local crime reduction partnership. It has signed up to the Respect Standard and its first 'Respect Festival' helped to raise awareness and provide information on help and support for victims. A prime example of how effective this has been is in the improvement in the quality of life for people living on the Turlin Moor estate. The estate had a poor reputation some five years ago, with high levels of anti-social behaviour and the appearance of the estate blighted by vandalised cars and graffiti. Demand for homes on the estate was relatively low and empty homes added further to the poor appearance of the estate.<sup>1</sup> This example shows how joint working can work to best effect.
- 130** PHP invests a significant amount of time and energy in community development work. It sponsors a good neighbour partnership award to celebrate acts of kindness and the work of 'local heroes'. It has supported the Football Focus league of 20 local teams (made up of youths with a history of anti-social behaviour) for three years by sponsoring football kits in exchange for community work. Other activities being piloted are aimed at promoting understanding between younger and older residents. These include a 'Life Swap' day and the Junior Wardens scheme. At Alderney West it has led on activities for youngsters, while on another estate it has set up a youth group. Its position as a community leader is reflected by the fact that the winners of the Poole Achievement awards (for local champions) in 2007 had links to PHP. These are all activities that put PHP at the heart of the community and reflect the wider role that is expected of social landlords.

### Estate management

- 131** This was also an area of strength in 2005. We found the estates to be well looked after, with little evidence of vandalism. However caretaking and cleaning standards in communal areas were inadequate.
- 132** Strengths now significantly outweigh weaknesses. The overall appearance of estates is good, as is that of most communal spaces. Tenants are engaged well in this service. A change to the caretaking and cleaning contractor and the commitment of the caretakers themselves has improved this service. Grass cutting remains an area of dissatisfaction on a small minority of estates.

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<sup>1</sup> More details of the work are given in the section on positive practice

## How good is the service?

- 133** PHP's estates are well regarded by tenants. In the 2007 tenant's survey, of the 84 per cent who were satisfied with the area in which they live, 44 per cent were very satisfied. Only 7 per cent were dissatisfied. The general appearance of estates is attractive and well tended with little evidence of litter and graffiti and no abandoned cars. Some issues such as dilapidated garages (in private ownership) and furniture in gardens detracted from the appearance of some roads, but overall the estates are well managed.
- 134** Tenants are engaged well in the management of this service. Each estate now has a representative to report on the condition of open spaces, using a rating system that is now backed up with photographic guidance to promote consistency. Environmental visual audits - joint estate inspections involving residents, PHP staff, Environmental Health, Police, Leisure, Transport and Community Development - were pioneered by PHP and have now been adopted by the Borough Council as an effective way of agreeing what each organisation needs to do to maintain and improve different estates. A 'planning for real' approach was taken to improvements on the Alderney estate. It invited the residents to a community centre and asked them to produce a 'shopping list' of improvements that they would like to see. The tenants were then involved in designing the improvements and one tenant has since been recruited as a resident representative.
- 135** A small budget of £18,000 has been delegated to tenants for minor environmental improvements which nonetheless make a big difference. At Canford Heath the communal gardens of a sheltered scheme suffered from a lack of privacy and security. One of the residents approached the ALMO about the problem and by providing financial support as well as supporting a lottery bid, it has been possible to restrict access to the communal gardens. These have also been redesigned to create raised planting areas, which are easier for residents to look after. Tenants who previously spent most of the day in their flats are now more active in looking after the grounds and feel more secure in their new surroundings.
- 136** The communal areas serving blocks of flats are in good condition, thanks to an excellent caretaking and cleaning service. Caretakers' work goes well beyond the traditional caretaking role. Among the tasks that they undertake are helping residents to overcome any fear of lifts, directing residents to help in dealing with anti-social behaviour and liaising with the Safer Neighbourhood Team, advising residents about utility bills and meter reading, dealing with emergencies, arranging furniture recycling and referring residents on low incomes to the food bank - where one of the caretakers is a volunteer. It would be impossible to include all of this on a traditional job description. This reflects a high degree of flexibility and a strong customer focus to this service, which residents appreciate.

**137** Grounds maintenance remains a source of dissatisfaction for a minority of tenants and leaseholders. To put this in perspective, while 74 per cent of tenants described their estate as good or excellent in the last survey (conducted at the Respect Festival) one in five identified path and garden maintenance as an area for improvement. It is likely that this is the main reason why a minority of 7 per cent described their estate as poor. Leaseholders and tenants we met supported this, with grass cutting on estates (as opposed to sheltered schemes) being the main cause of dissatisfaction. Until this year PHP did not manage this contract and this is the first year that it has paid directly for the service. Since taking over responsibility tenants have been involved in refining the specification and establishing regular contract management meetings with the Borough Council and private contractors. Giving tenants a greater say will help monitor and improve the service.

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### Leasehold management and Right to Buy

**138** This was an area of considerable strength in 2005. Communication and consultation arrangements, including a leaseholders' conference worked well. Service charge levels were transparent and fair, as were arrangements for major works. Right to Buy information, application processes and timescales were good.

**139** This remains an area of strength. Both services produce high levels of satisfaction. Services for leaseholders are easily accessible and the quality of information that they receive is of a very high standard. Customer care is a strength, as are the arrangements for consultation. Leaseholder charges are collected effectively and major repairs are managed well. The Right to Buy service operates efficiently and effectively.

### Leasehold management

**140** Leaseholders express a relatively high level of satisfaction with the service that PHP provides. Initial results from the 2008 leaseholder survey show that overall satisfaction has risen to 69 per cent.

**141** Leaseholders can access services very easily. They find the purchase process to be efficient and easy (regardless of whether they were purchasing under the Right to Buy or on the open market). As leaseholders they have the same extended hours and freephone access to the helpdesk as tenants enjoy.

**142** The quality of information to leaseholders is of a very high standard. The annual service charge information and invoicing is easy to understand and accurate. There is a good range of information on services in a welcome pack, a dedicated handbook and articles within the 'At Home' residents' newsletter. The dedicated handbook is itself a quality publication that includes everything a leaseholder might need to know, written in plain language.

**143** A range of relevant service standards have been agreed with leaseholders. These include visits to new leaseholders, annual statements, quarterly consultation meetings and repairs deadlines. The standards are being met and provide a highly professional impression of the service.

## How good is the service?

- 144** Leaseholders feel that they are listened to and able to influence decisions. There is an established leaseholders' panel and a range of improvements have been driven by leaseholders. These include the range of information now being provided, the involvement of leaseholders in procuring maintenance work and the provision of a low cost insurance policy.
- 145** Income collection arrangements are effective. PHP requires payment quarterly in advance in accordance with the leasehold agreement. Debts may be collected in a range of ways and support for leaseholders is offered where their circumstances have changed for the worse. Communications to leaseholders all make reference to the availability of independent advice from the Citizens Advice Bureaux. In the case of persistent non-payers, PHP advises that the next step will be to capitalise the debt with the mortgage company and this has proven to be very successful in attracting payment. As a result the total amount owed by leaseholders fell from £39,000 to £26,000 in the year to 2007/08.
- 146** Major works to leasehold properties are managed well. Leaseholders receive advance notice of up to two years of any major work and there have not been any unforeseen or very high bills to date. £4,000 for lift replacement is the biggest projected bill at present. Major works invoices are issued once the works have been completed and leaseholders are given a range of payment options.

## Right to Buy

- 147** Right to Buy applicants express high levels of satisfaction with the service. Of the 23 per cent of purchasers who responded to the most recent survey, all were satisfied with the quality of information provided and 94 per cent were satisfied with the overall service.
- 148** PHP processes applications within statutory deadlines and there is also a low level of appeals against the valuations of properties.
- 149** While benchmarking has been problematic, there is evidence of value for money being achieved in the service. Resources have been shifted to reflect the reduced demand for this service. Administrative costs are minimised through the tendering of valuation work to local surveyors. Income is maximised because PHP is alert to the risk of low valuations are a possibility and so requires three price comparators. With the decline in applications under the Right to Buy and the current low level of house purchasing, this is an area which PHP is exploring the potential for joint provision with a neighbouring Council.

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## Supported Housing

- 150** Supported housing services, which included sheltered housing and a tenancy support service, were a considerable strength in 2005. Sheltered tenants expressed high levels of satisfaction with the service. Residents were consulted well and had support plans, as required by Supporting People.
- 151** In this inspection strengths outweigh weaknesses. The services are making an important contribution to meeting the needs of Poole's large elderly and vulnerable population. Both services have addressed weaknesses identified in their Supporting People reviews and now have a high degree of tenant involvement, a strong customer focus and generate high levels of satisfaction. However, the sheltered housing service is not in a position to meet the future needs of the population.
- 152** Both services have addressed weaknesses identified in their Supporting People<sup>1</sup> review in 2005. The services were both scored 'C' - a typical score for the majority of other Supporting People services in the Borough - and have completed improvement plans to address the weaknesses identified. The sheltered service now self assesses itself as achieving level 'B' overall, while the tenancy support service assesses itself at level 'A'. However, some of the achievements claimed by the housing support service, such as the creation of rapid referral protocols are not yet in place.
- 153** PHP works well in partnership with the Council and the Health Service in developing services for older people. It has played a leading role in the older persons' strategy, which has so far resulted in the investment by health services of £700,000 in a one stop approach to health and care services. There is also a good operational relationship between the sheltered and supported housing services and the Poole Supporting People team. Supported and sheltered housing staff benefit from joint training events in specialist areas such as drug awareness. PHP will be better placed to develop its services as a result of these strong partnerships.
- 154** The sheltered housing service has a strong customer focus. There are SMART<sup>2</sup> service standards and useful information for both applicants (the sheltered housing brochure) and tenants (the annual newsletter). There is an active Sheltered Housing Forum and tenants were directly consulted by ballot on the change from resident to non-resident staff. Changes in the culture of the service have been assisted by the adoption of a new code of practice for the service and the provision of uniforms to members of the team. As a result tenants express very high levels of satisfaction with the service.

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<sup>1</sup> Supporting People is the name given to housing-related support services for vulnerable people. This can vary from accommodation-based services such as sheltered housing to specialist services for drug users and ex-offenders.

<sup>2</sup> SMART - Specific, Measurable, Achievable, Realistic and Time bound.

## How good is the service?

- 155** The sheltered housing service has a very strong emphasis on promoting independence. The £7.53 weekly charge for sheltered housing is very low and reflects the fact that sheltered housing staff now have an average of 50 residents each as well as carrying out housing management duties. They no longer carry out tasks such as making the tea for residents' meetings, but focus on encouraging residents to organise social events themselves and elect committees and a scheme representative. Changes to the grounds maintenance contract now enable the contractor to shift resources from grass cutting to more difficult tasks, such as tree-logging, if tenants are fit and able to undertake the less onerous tasks. The extension of IT facilities to sheltered housing has been a particular success, with tenants now trained by PHP staff to use computers. They have been used by tenants for example to order home deliveries of shopping, obtain car insurance and book holidays.
- 156** The sheltered housing service is not configured to meet the needs of the increasingly frailer population. Some schemes can only meet the needs of the healthiest of older people. Given that 31 per cent of Poole's tenants are aged over 75 and will become increasingly frail in the coming years, this service is unlikely to meet their needs. By contrast around half of all sheltered tenants require no daily visits. This raises the question as to whether they need any sheltered service at all and whether the Supporting People charge should be the same for this group as it is for the residents who most need and use the service.
- 157** The problem is compounded by a low supply of 'extra care' sheltered housing and the design of some schemes. The Poole Older Persons' strategy identifies a range of issues affecting the popularity of the 1,381 sheltered homes that PHP manages. Almost 300 are described as 'most unpopular due to isolated location and lack of facilities and shared facilities due to bed-sit accommodation'<sup>1</sup> while 700 do not have lift access to their upper floors. A further 130 are 'less popular due to location and facilities'. The one extra care sheltered housing scheme in the Borough is described as being modern and accessible but 'not of a sufficiently high standard to truly provide independent living'. While the other attractions of Poole and the offer of bedsits to homeless men results in relatively low refusal rates, this situation is not sustainable as the expectations of prospective tenants increase and existing tenants get frailer.
- 158** The tenancy support service provides effective low level support to around 60-70 other vulnerable residents. The support covers budgeting, household management, dealing with correspondence and increasing self-confidence. It also acts as a signposting service to other agencies such as benefits, social care and community services. Without these services vulnerable people would be more likely to be isolated and less able to maintain their independence.
- 159** The customer focus of the tenancy support service is strong. Consultation with users of the service works well through coffee mornings, which were the suggestion of the users themselves. These have been held every month since and contain a mix of useful presentations, answers to questions and recreation time. PHP has learned from the group about concerns with internal communications and the need to publicise the service.

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<sup>1</sup> PHP has advised that it has no accommodation with shared facilities, though it did play an important role in developing the strategy

**160** Success and satisfaction rates among users of the tenancy support service are very high. Of the 64 people helped by the service in the year to July 2008, only seven failed to complete their programme. The main reasons for not engaging were relapses from alcohol or substance misuse and mental health issues. However none has lost their tenancy as a result, 27 were able to reduce their arrears (3 increased) and 30 breaches of tenancy conditions were resolved. All of those completing the programme expressed satisfaction with it.

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### Is the service delivering value for money?

**161** In the 2005 inspection this was an area of strength. The ALMO had a good understanding of its relative costs and was directing resources to areas in which performance was relatively weak. Weaknesses were confined to the quality of service level agreements and in the time taken to relet homes.

**162** This is now an area with considerable strengths and few weaknesses. The leadership and culture of value for money throughout the organisation is very strong. PHP is delivering a value for money service with a high degree of cost awareness and a strong focus on delivering value for money improvements in each service. A range of procurement options are being taken to deliver best value. However, the strategic framework for improving value for money is an area for improvement and value for money of some recent initiatives has not been assessed.

### How do costs compare?

**163** PHP undertakes regular cost benchmarking and as a result has a good understanding of its costs and how they compare. It last undertook overall benchmarking in 2007 and the organisations involved were all ALMOs most of whom have been assessed as performing strongly. This commitment to comparison and challenge has helped to drive performance up.

**164** The results show that PHP provides its services at very low costs compared with other ALMOs. It is the lowest cost ALMO in the south-west and the lowest cost non-metropolitan ALMO. Alongside an overall improvement in performance the ALMO has been able to reduce the cost of housing management from £17.75 to £15.15. Over the past year it has made cost savings of £670,000 at the same time as improving performance in most areas. This supports the very high of tenants (87 per cent) who believe that the service provides value for money.

**165** PHP has also commissioned very detailed cost and output benchmarking of individual services. The detailed benchmarking of sheltered housing involved 14 organisations and produced information on stock turnover, stock types, void performance, support costs and charges, arrears levels and the ratios of charges and dwellings to staff. This qualitative approach will help to inform decisions on the future of the stock.

## How good is the service?

### How is value for money managed?

- 166** Leadership of the value for money agenda is strong and there is a very well embedded value for money culture. PHP aims to be 'one of the best providers at the lowest cost possible.' There are clear organisational objectives in respect of value for money and responsibility for it is clear and spread throughout the organisation. The delivery plan demonstrates a good understanding of the nature of value for money and of the difference between efficiency and effectiveness. Of the 50 performance indicators that the board and senior managers monitor each month, 24 relate to value for money. These encompass management and maintenance costs, income collection, relets, capital and planned works, the board and staff. The message is clear to staff and partners that value for money is integral to every activity.
- 167** Value for money features strongly in the culture of the organisation. It is embedded through personal and team targets, incentives and rewards, an 'invest to save' scheme, the annual service review process and zero-based budgeting. Staff are encouraged with quarterly prizes to identify value for money improvements through a suggestions scheme. Among the most recent were savings on stationery, low cost computer recycling, training and broadband costs, decanting costs, in-house asbestos training, avoidance of aborted gas and electricity meter readings, the use of light sensors in communal areas, savings on decoration vouchers and the installation of level access showers as part of the refurbishment programme.
- 168** PHP's approach to procurement is delivering value for money. There are four characteristics to the approach.
- Firstly, PHP will adopt whichever form of procurement works best. For example, it considered a wide range of procurement options in selecting its decent homes contractors. In most instances in-house or long term contracts could demonstrate greater value for money than joint procurement and so this route was taken. As the contracts come up for renewal a further round of market testing is under way. Elsewhere joint procurement is used to deliver efficiency savings in the purchasing of gas and electricity (in a timely contract that was entered into prior to the recent price rises) and through the London and Northern housing consortia.
  - Secondly, 'value engineering' is built into each contract, with profit and risk shared between PHP and its partnering contractors.
  - PHP is prepared to take difficult decisions. To address underperformance, it has shown itself willing to dismiss the repairs contractor and reassign the work, with positive results. It has successfully challenged the provision of support services managed by the Borough Council. It has moved to an in-house personnel service, and is renegotiating the cost of cash collection. The internal audit service currently the subject of a tendering process. The Council has corporately recognised that this provides a welcome challenge to its in-house services.
  - As has been shown already, PHP uses benchmarking against other arms length management organisations to help to understand its costs and how they relate to performance.

- 169** PHP has been working increasingly with the Bournemouth housing service to the benefit of both parties. Aside from the most common areas of joint working - the commissioning of surveys and benchmarking - more imaginative ways have included the secondment of a leasehold officer for two days a week from Bournemouth to Poole at a time of difficulty in recruitment. The two organisations have assisted each other on internal staff interviews in order to enhance the objectivity of the process. The two also organise training events together and so reduce the cost per head of each event. Joint management teams are held and contract managers have aligned the end dates of contracts in, for example, lift maintenance, so that they may be jointly procured in the future.
- 170** Service by service, the biggest areas of expenditure can demonstrate that PHP is managing and improving the value for money of its services very effectively.
- In the 2007/08 capital programme, inflation increases were held back for kitchens, bathrooms and radiators and so the same quality was delivered for £65,000 less in real terms; renegotiation of the rewiring contract produced £67,000 of savings for the same specification. PHP has recently agreed an increase from two years to a five-year warranty for boilers and at the same time saved over £18,000 on the cost of the contract. The sequence of decent homes works embraces the principles of 'worst first' and the clustering of work to ensure that overhead costs are kept to a minimum.
  - The proportion of planned to responsive maintenance at 90:10 is the highest of any ALMO and shows that PHP is minimising its expenditure on the most costly form of repairs.
  - Repairs contracts are Egan compliant and through a process called 'value engineering' have achieved savings of £200,000 at the same time that performance has improved. Value engineering is a way in which each component of a service is considered in detail to identify better longevity and more cost effective ways of providing it.
  - Less time is spent on pre-inspecting repairs, yet 85 per cent of repairs are now completed at first call. Repairs administration costs are low according to the 2007 benchmarking study.
  - The cost of repairs to empty homes is low and has increased at less than the rate of inflation. The actual amount of time taken has halved to the best nationally, at 13 days on average.
  - The cost and quality of caretaking and cleaning work has both increased, but the use of tendering and positive feedback provides evidence that this service provides better value.
  - A high proportion of tenants - 44 per cent - pay by direct debit while a further 40 per cent use the second lowest cost payment method; the payment card.
  - Support service costs are well managed. PHP pays invoices promptly but at a very low unit cost. Unit costs are also low for payroll services. Market testing of audit and the recruitment of an in-house personnel officer has generated cash and non-cash savings of over £20,000 a year.

## How good is the service?

- 171** The focus of managers and staff on value for money is not reflected in a clear strategic framework. The procurement strategy lays out some important principals to guide the way that PHP conducts its business, such as the focus on planned, as opposed to responsive, maintenance. However there is no action plan and very few clear targets, with all of the focus on the repairs and maintenance services. This has not stood in the way of PHP achieving significant cost savings across the board, at the same time as improving each service, but the savings could have been accelerated had the approach been more coordinated.
- 172** PHP is not systematically assessing the value for money of some new initiatives. For example, it took the imaginative step in 2006 of offering vouchers valued from £75 as incentives to tenants to leave their homes in good condition. This has reduced the cost of cleaning, but PHP is also paying vouchers out to tenants who would have left their homes in good condition regardless. PHP has not assessed how the initiative has impacted on overall spend in this area. Similarly, the PHP plus service has not yet been subject to a value for money appraisal.

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# What are the prospects for improvement to the service?

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## What is the service track record in delivering improvement?

- 173** PHP had a strong track record in 2005. It had been able to implement recommendations from previous inspections and make sustained, qualitative improvements that tenants would recognise.
- 174** There continues to be a strong track record of improvement in performance, value for money and of responding to external recommendations. The majority of national indicators are improving and local indicators reflect this. It is delivering improved value for money and there are good examples of qualitative improvements in each service. There is a positive track record of responding to the majority of external recommendations and PHP has consistently performed well against its own plans.
- 175** Each area of service can demonstrate continuous improvement. Some of the most important are as follows.
- The proportion of homes that are non-decent has been reducing steadily since 2004/05. Over four years it has fallen from 58 per cent to 25 per cent in 2008. As a direct consequence, the average SAP (energy efficiency) rating of each home has risen from 58 in 2004/05 to 75 in 2007/08. This and the speed of repairs and adaptations are the key improvements in repairs and maintenance.
  - Three of the four BVPIs for rent collection show a positive trend of improvement over the past three years. The collection rate, the minimal use of notices of seeking possession and evictions have all improved, with the latter two already in the best 25 per cent. The proportion of tenants owing more than seven weeks rent has slipped slightly but remains average.
  - The time taken for adaptations has improved from 66 days to 12 days for minor adaptations and 21 months to (currently) five months for major adaptations.
  - Resident participation is improving. The number of involved tenants has doubled in the past year and satisfaction with opportunities to participate has increased from 57 per cent to 71 per cent.
  - PHP has improved its understanding of the characteristics of its tenants and the diversity of those involved in the service.

It is important to note that in most areas performance is improving from an already above average or top 25 per cent position.

## What are the prospects for improvement to the service?

- 176** The data table in the appendix shows that there has been an overall improvement across the board in performance, with all aspects of satisfaction and repairs and maintenance improving, written responses improving, most income collection, value for money and diversity indicators improving. Only telephone services and anti-social behaviour do not show improvement, but these already perform highly and the deterioration is negligible.
- 177** There have been significant qualitative improvements since our 2005 inspection including:
- the improvements in appointments and work scheduling system for the repairs service;
  - the increase in informal resident consultation and the growth in community development work;
  - the provision of internet access to sheltered housing tenants and improvements in the quality of communication;
  - improvements in the quality of caretaking and cleaning services; and
  - services to leaseholders.
- 178** The value for money of the service is improving. The proportion of tenants who consider that the rent provides good value for money has increased from 82 to 87 per cent. Alongside an overall improvement in performance PHP has been able to reduce the cost of housing management from £17.75 to £15.15 over the past three years. The cost of repairs to empty homes has increased at less than the rate of inflation at the same time that the time taken to relet has halved. Other positive indicators of value for money are a high proportion of expenditure on planned as opposed to responsive work and 85 per cent of repairs being completed at first call.
- 179** PHP has implemented most of the recommendations of our 2005 inspection. The recommendations ranged from 'quick wins' such as the introduction of a freephone service and improvements in the literature produced, to IT-led improvements such as the appointments system, repairs prioritisation, better electronic links and separate income collection debits. Other more substantive changes have included a new resident participation strategy, a new caretaking contract and the involvement of tenants in contractor selection and monitoring. The issues that remain outstanding are the agreement of a longer-term plan to cover the service beyond 2011 and the degree to which PHP monitors the actual take-up of services by different groups.
- 180** The sheltered service has addressed the recommendations of the Supporting People review when it was awarded a 'C' rating. These include the quality of support plans, resident participation and complaints. Similarly, the tenancy support service has addressed recommendations that included risk assessments, information recording and support planning.

### How well does the service manage performance?

- 181** The approach to planning and performance management exhibited both strengths and weaknesses in 2005. PHP lacked a longer-term vision, but had a strong best value culture and focus on operational plans.
- 182** Strengths now outweigh weaknesses in this area. PHP has a strong performance management culture that is apparent from its openness to learning and its performance monitoring and management arrangements. Its approach to financial and risk management is equally strong. The three-year delivery plan is of a high quality and there is a clear longer-term vision for the service. There are many actions being pursued that will deliver further improvement. Some data has been reported inaccurately until very recently, but this is being addressed. It is not yet clear how PHP will resource its longer-term ambitions and while a number of strategies are strong on ambition, it is less clear how they will be achieved.
- 183** There is a strong performance culture throughout the organisation. Performance is monitored monthly by officers and bi-monthly by the board and there is an annual report to the Council. The performance report for 2007/08 is an excellent document. It is concise, but is able to present a range of information broken down into service areas and cross referenced to priorities such as customer care and VFM. It is traffic lighted to enable managers and the board to focus on variations against target and includes a short commentary on each of the 50 targets being monitored. The targets are relevant both in terms of outcomes and a handful of key inputs, such as staff turnover. Comparisons are given to show the two year trend, the target for the year and the peer group. In addition to this, the Service Improvement Review Board has a three year review plan covering all of the key service areas. By getting the right amount of information on a timely basis in a well presented way the board and managers will be better able to monitor and manage performance.
- 184** The board has been able to demonstrate the ability to make difficult decisions. It has supported managers over disciplinary issues and in dealing with poor performance from contractor. Managers can feel more confident in tackling these issues when they have the full backing and confidence of their board. It has also led one of the first equal pay reviews of a housing service and while this has led to some posts having the salary level reduced (with existing postholders given limited protection) it means that PHP will not be vulnerable to legal action in this respect. This demonstrates the strength of leadership of performance within PHP.

## What are the prospects for improvement to the service?

- 185** Target setting has improved although the ALMO did not consistently set itself stretching targets in many areas in 2007/08. In income management the target for the proportion of tenants owing more than seven weeks' rent was 7 per cent, when the level was only 3.8 per cent. The target for rent loss from voids was 0.78 per cent against a 2006/07 figure of 0.73 per cent. For voids the target was to spend £1,000 a property when an average of only £827 was spent previously. For the planned: responsive mix there was a target of 80 per cent when 90 per cent had been achieved. This pattern is repeated for appointments, adaptations, invoices and other areas. Only decent homes and the speed with which repairs are handled contained stretching targets. Perhaps unsurprisingly the service easily achieved virtually all of these targets. Managers recognise that targets in areas such as voids were not challenging because they were set well before the end of year performance was known. This has since improved and the targets for 2008/09 are now more challenging. Effective target setting will help PHP to achieve further improvement over and above its current high standards.
- 186** There is an effective individual performance management framework. Quarterly 'one-to-ones' focus well on the key issues and projects for individual members of staff. The format of the meetings allow for a two way exchange of views. Surveys show that staff understand their targets and how they contribute to the overall objectives of the organisation. The targets themselves vary from team targets to individual projects and most staff are able to recall their own targets, which are stretching. Though individual targets are not explicitly linked to PHP's five strategic objectives, they do focus on diversity, tenant participation and value for money. Effective performance management is helping to translate PHP's core objectives into positive outcomes for residents.
- 187** There are robust financial management systems in place. The ALMO uses a zero-based approach to financial planning and involves residents through surveys and panels in reaching its budget decisions. Electronic invoicing has been introduced to the highest area of expenditure and the main contractor submits its invoice on a monthly basis. This means that budget holders have accurate and up to date information to monitor and this is also produced regularly, with monthly budget meetings held. As a result, in 2007/08, the largest budget - for decent homes - was £8.4 million and the outturn expenditure was £8.5 million. In both 2006/07 and 2005/06 outturn expenditure was no more than £200,000 from the budgeted figure. Effective budgetary management is helping to deliver improved homes at the earliest opportunity.
- 188** PHP manages risk well. The strategic risk register identifies a comprehensive range of risks and effective mitigation arrangements against each of the objectives of the organisation. The risks are broken down into financial, contractual, legal and reputational and cover both high level risks such as board level failure and operational risks such as a failure in gas servicing. Internal audits are risk-based, according to the annual management letter. Most importantly, it has shown itself to be capable of handling such risks, when it lost all of its finance team and also when Poole was subject to a complete power failure. By managing risk well, PHP is able to concentrate on its core objectives, rather than be distracted by crisis management.

## What are the prospects for improvement to the service?

- 189** PHP is open to learning and has benefited well from this. It uses external challenge and accreditation very effectively. An independent 'mock inspection' in early 2007 identified a number of important weaknesses that led to improvements in gas servicing, rechargeable repairs, opening hours and the website. It has sought and achieved accreditation in Chartermark and Investors in People. It also learns from other high performers through its participation in both the South-West and the London and South-East ALMO improvement groups. It has also learnt and benefited from Poole Borough Council's own expertise in youth development.
- 190** The three-year delivery plan is of a high quality and is well used to direct the work of PHP. PHP's ambitions go well beyond those of traditional housing management. It sets out clearly in its business plan how it contributes to the Council's six corporate priorities. These include the work it does with children and young people; how it supports the Council's 'clean, green and safe' agenda; how it promotes community development and how it contributes to the local economy. As earlier paragraphs have shown on community development, this is a real and genuine commitment. The plan is open about some of the weaknesses that PHP is addressing. A SWOT analysis highlighted staff turnover, financial issues, the understanding of diversity, prioritisation and service planning, the number of active tenants and allocations issues as weaknesses. This plan plays a central role in driving forward the service.
- 191** There are robust future plans in place to both address weaknesses and build upon the strengths of the service. Taking each service in turn the most important include:
- Access: assessment against the government's customer service excellence standard and EFQM recognition in four areas, as well as improvements to website navigability;
  - Diversity: a stronger focus on diversity within the performance monitoring framework.
  - Capital and planned maintenance - most importantly, the options appraisal informed by an updated asset management plan and a revised energy efficiency strategy;
  - Cyclical maintenance- an integrated asbestos database;
  - Income management - the financial inclusion strategy and funding of an officer to implement the strategy;
  - Tenancy and estate management - the adoption of the new tenancy conditions and rolling out the inspection of estates by resident representatives; and
  - Value for money - a review of the procurement and value for money strategies (planned for September 2008) and the alignment of the end dates of Poole and Bournemouth maintenance contracts, so that they may be jointly procured in the future.

## What are the prospects for improvement to the service?

- 192** Weaknesses in the quality of data that PHP relies upon have been addressed, albeit only recently. Controls in place to assure the quality of data include internal and external audits and Housemark checks, where outlying figures are challenged. Board members expressed concerns in 2007 and now require any data to be validated before being reported. However until 2007 performance on income collection and gas safety was reported incorrectly, overstating performance in both instances. On income collection performance was above average rather than best 25 per cent. On gas safety it meant that some homes were a matter of weeks overdue on their checks, which means that PHP was not meeting its statutory duty. Given the importance of rent collection and gas safety data, it is a concern that this has only recently been identified.
- 193** The Council has not yet identified how it will maintain its homes to the decent homes standard in the medium to long term, but work on this is well under way. A further options appraisal is programmed for the end of 2009/10 in order to identify how to meet the standard beyond 2013, when a significant funding gap will emerge. This is recognised as the biggest risk faced by PHP and one of the greatest faced by the Council. PHP is currently drawing up a 30 year business plan with 2008/09 as the base year and is updating its asset management plan. The business plan is to include the likely efficiency savings that the service can make, which can be ploughed back into the funding of decent homes work. However this will not be enough to meet an average funding shortfall of £3 to 4 million a year. Although the government has delayed producing proposals for the future of the HRA (which were expected in March 2009) PHP is exploring some of the emerging options, alongside other ALMOs with similar funding gaps. The Council has developed a project plan for the options appraisal and is in the process of appointing a project manager and external advisor. This provides confidence that tenants will have the opportunity to decide which option will suit them best well before the money begins to run out.
- 194** The longer-term funding arrangements for the service remain unclear. As has previously been discussed, this depends upon tenants selecting an option that will generate the funding to meet the average £4 million a year needed to maintain the homes to the decent homes standard.
- 195** As has previously been noted, some of the plans that PHP is working to set out clear ambitions, but are not supported by action plans to show how its ambitions will be materialised.
- The asset management strategy sets out a framework for stock investment and management, but contains no action plan or clear targets.
  - The value for money strategy and energy efficiency strategy have similar weaknesses.

PHP recognises that these are weaknesses and is in the process of reviewing each ahead of the options appraisal.

### Does the service have the capacity to improve?

- 196** The capacity of PHP to deliver improvements was strong in 2005. There was strong leadership, with a capable and experienced board, good quality staff and strong partnerships in place. However the Council's own contract management arrangements and the quality of some performance management information were weaknesses and risk management was under-developed.
- 197** The capacity of the organisation is now an area of considerable strength. The quality of leadership by the board and Chief Executive is impressive. Managers and staff are of a high calibre and well motivated. PHP makes good use of its financial resources including IT. Partnership working is strong. The funding gap is a barrier to maintaining the decent homes standard, but should not stand in the way of excellence in other aspects of the service.
- 198** PHP is well governed by a strong board. It is made up of five tenants, five Councillors and five independent members. Board meetings are chaired well in a business-like, but friendly style. It was clear that board members had considered the agenda beforehand and asked questions that were relevant and challenging. Sitting below this are four sub-committees whose remits cover finance and audit, personnel, resident involvement and service improvement. The Board is skilled and enthusiastic and has a good balance of ages, genders, disability and ethnicity. Tenant, Council and independent board members are valued equally and the independent members bring in important additional business, public sector, surveying and legal expertise. Independent board members are particularly credited with driving the value for money agenda. There has been effective provision of training for board members involving two 'awaydays' per year and a series of 'one off' training events in particular subjects and observations of over 20 other organisations. Every board member is appraised annually and a training matrix has been produced from the skills gap analysis and the appraisals. Leadership is the key success factor in any organisation and PHP is able to demonstrate this.
- 199** PHP has a modern memorandum of association, adopted in 2004. The memorandum provides a wide remit for its work; in effect to carry out any activity on behalf of the Council, including the development of new homes. The memorandum includes the power to take positive action to promote the principles of equality of opportunity irrespective of age, gender, race, nationality, ethnic origin, religion, sexual orientation or disability. It sets out the balance of membership and arrangements for the recruitment (and, if necessary, removal) of members. This is supported by a Code of Conduct for members which encompasses selflessness, honesty and integrity, objectivity, respect for others and a register of interests. PHP can demonstrate its commitment to integrity through these documents.

## What are the prospects for improvement to the service?

- 200** The board itself is clear about its role, which is seen as helping to ensure that the business is run properly, looking to plan for the future and challenging the management team to deliver continuous improvement. It has put in place a range of effective structures and monitoring measures to help it achieve this ambition. These include the improvement boards and panels already discussed in the section on resident involvement. It has carried out an assessment of the quality of its own arrangements against the 'Langlands' guidance on corporate governance and judges that it performs well. We would support this.
- 201** The Chief Executive and management team are of a high calibre. There is a very good working relationship between the Chief Executive and the Board. Managers of the service are highly visible and accessible to staff. For example, the Chief Executive has spent time on estates with caretaking staff. This sends the message that every member of staff is valued and part of the PHP team, regardless of whether they are directly employed or not.
- 202** Staff capacity is strong. There is a workforce strategy backed up with a good quality action plan that includes such targets as the introduction of trainee posts, ensuring that the workforce is representative of the population and the creation of an in-house personnel function. All staff sign up to a statement of values that lays out what is expected in the broadest sense of their behaviour, as well as what they can expect of their managers. An induction pack for new staff provides a welcome and introduction to the values of PHP, as well as the key documents that drive the work of the organisation and the wide range of development and training opportunities. As a result of this the 2007 staff survey showed that morale is very high and a high proportion of staff feel empowered and have the support of their managers. This extends to sheltered housing staff who, by the very nature of their working arrangements, are remote from the office and most difficult to motivate. Nine out of ten staff enjoy working for PHP and sickness absence is below the average for other ALMOs.
- 203** PHP makes good use of its financial resources. It has already been shown that it operates at a relatively low cost. There is a £200,000 reserve held in balances by PHP and a £700,000 HRA reserve held by the Council. The outturn for 2007/08 showed a favourable balance of £50,000. External auditors found no major concerns with the financial systems. However, as has been previously noted, the funding gap that will emerge in 2012/13 provides a degree of uncertainty that the condition of the housing stock will continue to be maintained to the Poole standard.
- 204** Managers, board members and tenants have access to good quality ICT. There has been major investment over the last four years in the systems that staff, tenants and contractors have access to. Business systems are integrated and there are interfaces with the systems of the repairs and gas servicing contractors; software improvements also cover document management, the use of GIS, rent payments, asbestos management and repairs appointments. Housing staff have modern hardware and personal computers are available in the reception and in the common rooms of each of the sheltered housing schemes. We found only two areas for improvement; the telephony system and the monitoring of anti-social behaviour, both of which have been mentioned previously.

## What are the prospects for improvement to the service?

- 205** Strong partnerships enhance the capacity of the service. The delivery plan lays out a wide range of ways in which PHP is contributing to the wider objectives of the Council. This shows the important role that it can play, for example by investing £60 million in the local economy in a variety of ways and in its anti-social behaviour work contributing to the 'clean, green and safe' priority. It cross references all of the working groups that PHP contributes to and where its own plans fit in. The Council and PHP have worked hard to develop strong and constructive processes of joint performance management and contract monitoring, which enable the two organisations to focus on how to improve outcomes and value for residents. They are also working constructively in relation to the future options appraisal for the future of the housing stock. Our focus group of key stakeholders was very well attended and all praised PHP's commitment to customers and the wider community. They identified strong leadership, the team working ethos and a willingness to engage in partnership working as key strengths as well as a listening and flexible approach to tackling problems.
- 206** PHP is playing an important role in the Safer Poole partnership. It participates in Safer Neighbourhood Teams in three priority areas within the Borough. The police service values the immediate response that they obtain when criminal and serious anti-social behaviour is reported. The health services also value the speed with which residents are discharged from hospital thanks to the response of the sheltered, tenancy support and adaptations services.
- 207** There is a positive partnership between PHP and its contractors. PHP is viewed by repairs and maintenance contractors as being a listening organisation and having an ethos that is based on excellence and quality. They say that the creation of PHP has resulted in less 'red tape' and work well on an informal basis with the customer contact centre. Cleaning contractors value the mutual respect and quality of communication with staff. This has two advantages; it generates a fast response to urgent tasks and cleaning operatives report any management problems that they encounter on estates.
- 208** PHP is seen by its partners as playing a leading role in the local community. Initiatives such as the CAB debt advice service, the EVAs, the Respect Festival and employment of in-house OTs are all considered to have been driven by the ALMO. The extent to which PHP invests in community development is an indicator of its commitment to partnership working. This adds to the contributions that other partners are making in areas such as youth development and money advice.

# Appendix 1 – Performance indicators<sup>1</sup>

Description	2005/06	2006/07	2007/08	Comments
<b>SATISFACTION</b>				
Tenant satisfaction overall	82.6	83.4	83.4	Improving and high
<b>ACCESS AND CUSTOMER CARE</b>				
Percentage of calls abandoned calls	3.1	3	3.4	Deteriorating but low
Complaints answered on time per cent	94	93	92	Deteriorating but high
Letters responded to in 10 days per cent	80	91	95	Improving
Invoices paid within 30 days per cent	83	79	80	Improving
<b>DIVERSITY</b>				
Satisfaction among Black and Minority Ethnic groups with opportunities to participate	n/a	n/a	n/a	Sample size too small for PHP to be able to estimate this
Compliance with CRE standard for housing management	yes	yes	yes	
Percentage of housing offices that are accessible	100	100	100	
Days to complete minor adaptations	13	16	12	Improving and strong. Does not include OT time, though this is less than two weeks
Months to complete major adaptations	9.2	7.3	8.8	Improving and strong (currently 5 months). Does not include OT time, though this is less than two weeks
<b>INCOME COLLECTION</b>				
Proportion of rent collected	97.7	98	97.9	Originally reported as 99.6 (2005/06) and 99.4 (2006/07) but since revised
Percentage of tenants owing more than 7 weeks rent	4.2	3.8	5.2	Deteriorating but low
Percentage of tenants subject to NOSP	12.5	4.5	4.8	Improving and very low

<sup>1</sup> Source: Best Value Performance Indicator reports and Poole Housing Partnership monthly performance reports

## Appendix 1 – Performance indicators

Description	2005/06	2006/07	2007/08	Comments
Percentage of tenants evicted for rent arrears	.09	.07	.07	Improving and among the best
Percentage of rent written off	0.3	0.3	0.3	Unchanged but among the best
Percentage rent loss due to voids	0.79	0.73	0.41	Improving and among the best
Volume of FTAs	0.40	0.37	0.38	Strong area of performance
Collection rate for rechargeable repairs per cent	n/a	20	26	An area in need of improvement
Collection rate for leaseholder service charges	n/a	82.5	106.4	Strong area of performance
<b>STOCK INVESTMENT AND ASSET MANAGEMENT</b>				
Satisfaction with home	85	86	89	Strong area of performance
Satisfaction with decent homes work	97.6	94.2	98.2	Exceptionally strong area of performance
Percentage of homes failing decent homes standard	59	53	44	Currently 25 per cent due to £12m programme for 08/09 and nature of work
Average SAP rating	63	70	75	Above average
Emergency repairs completed in target	95.9	98.7	99.1	Exceptionally strong area of performance
Urgent repairs completed in target	94.5	97.9	99	Exceptionally strong area of performance
Average time to complete routine repairs	16	14	12	Exceptionally strong area of performance
Percentage of appointments made and kept	90	95	100	Exceptionally strong area of performance
Average relet time	26	26	13	Exceptionally strong area of performance
Percentage of stock with up to date gas safety checks (homes)	99.6	99.6	99.8 (5)	Strong (but previous years figures unreliable)
<b>RESIDENT INVOLVEMENT</b>				
Satisfaction with opportunities to participate	52	71	71	Above average
Number of involved residents	n/a	95	171	

## Appendix 1 – Performance indicators

Description	2005/06	2006/07	2007/08	Comments
<b>ESTATE MANAGEMENT</b>				
Satisfaction with estate	82	81	84	Above average
Percentage of offensive graffiti removed within 24 hours	n/a	98.8	96.1	Strong
Percentage of ASB complaints resolved	n/a	n/a	59	
No of evictions for ASB or other breach of tenancy (except arrears)	1	0	2	
<b>VALUE FOR MONEY</b>				
Balance of planned to responsive maintenance	91	89.6	90.1	Exceptionally strong area of performance
Percentage of repairs completed 'right first time'	n/a	n/a	85	Exceptionally strong area of performance
Percentage cent of variation orders	48	55	5	Changed definition, with limit raised to £100.
Percentage of tenants paying rent by DD	39.3	41.6	44.3	40 per cent also pay by payment card, which is also relatively low cost. Small number of high cost cash office payments remain
Percentage pre-inspections	18	14.7	12.6	Low due to effective partnering
Percentage post inspections	n/a	<8	<8	Low due to effective partnering
Cost per week (£) of housing management service	17.75	15.15	15.05	Low
Average repairs cost	16.23	17.37	18.26	Reflects high number of jobs in one visit and degree of flexibility to contractor plus handyperson service
Average cost of repairs to voids (£)	904	827	846	Good value for money given low void repair times

## Appendix 2 – Progress against our 2005 recommendations

Recommendation	Action
<p>Ensure services are accessible to the diverse range of people in the community by developing the level of representation of the whole community in service delivery, planning and governance over the next 12 months.</p>	<p>Partially achieved - the representation of younger tenants and tenants of Black and Minority Ethnic origin has improved due to the increased range of informal means of participation. Some aspects of service delivery have made access easier for specific groups - the adaptations service is the best example of this. However PHP cannot yet show that services are accessed and delivered fairly to all sections of the community.</p>
<p>Improve access arrangements by telephone to ensure a consistent and equitable approach for all tenants and leaseholders within six months.</p>	<p>Achieved - tenants and leaseholders now have freephone access ; some technical problems remain but are being addressed.</p>
<p>Dates of board meetings on Website with agendas and minutes, and details on resident involvement.</p>	<p>Achieved - new website was launched end of February 2008 and includes this feature. To date there have been 8,051 hits and 69,846 pages have been visited.</p>
<p>Improve repair and maintenance services for tenants by:</p> <ul style="list-style-type: none"> <li>• developing with tenants, within six months, an investment plan and publicise this to all tenants and leaseholders letting them know what improvement works will be delivered to their home and when and what, if any, potential cost there may be to leaseholders;</li> <li>• taking action within three months to improve the repairs appointments system so that tenants can make an appointment at the time of ordering any responsive repair;</li> </ul>	<p>Achieved:</p> <ul style="list-style-type: none"> <li>• There is an investment special newsletter, which goes out annually and details the programme. There are also resident liaison officers working on each contract.</li> <li>• Tenants can now make appointments at the time that they report repairs</li> <li>• Letting standard now agreed and relet times reduced to an average of 12 days</li> <li>• Targets set and time for minor adaptations now 12 days and for major work 5 months</li> </ul>

## Appendix 2 – Progress against our 2005 recommendations

Recommendation	Action
<ul style="list-style-type: none"> <li>• agreeing with tenants improved standards for the repair of empty homes and implement revised procedures to ensure the worsened relet time for empty homes is tackled effectively, within six months; and</li> <li>• within three months set challenging targets for reducing the long waiting time tenants are experiencing for major adaptations to their homes.</li> </ul>	
<p>Improve the consistency of tenancy and estate management services by:</p> <ul style="list-style-type: none"> <li>• within six months revising the block cleaning and caretaking standards to tackle inconsistencies in service and ensure that tenants can easily see cleaning monitoring notices in communal areas in their blocks; and</li> <li>• ensuring all tenancies are reviewed in a planned programme of tenancy audits to ensure that there are no inconsistencies in tenancy status for people on non-secure tenancies and licences. To be commenced within six months.</li> </ul>	<p>Partially achieved:</p> <ul style="list-style-type: none"> <li>• Cleaning and caretaking contract relet in consultation with tenants and leaseholders and satisfaction levels now much higher</li> <li>• Programme of tenancy audits has commenced but still has some way to go</li> <li>•</li> </ul>
<p>Improve resident involvement by:</p> <ul style="list-style-type: none"> <li>• working with tenants and leaseholders currently involved in formal and informal arrangements for participation to swiftly progress planned new arrangements for resident involvement to ensure the transition is as effective as is possible;</li> <li>• publicising existing and proposed new arrangements for resident involvement as widely as possible within three months, including on the web-site and via internal newsletters and the local press;</li> <li>• seeking ways to develop the involvement of groups not well represented at present in resident involvement with existing partners in the community, within 12 months;</li> <li>• ensuring that within 12 months an appropriate balance between general needs housing groups and specialist forums is achieved in resident involvement structures; and</li> </ul>	<p>Achieved:</p> <ul style="list-style-type: none"> <li>• Revised and improved tenant compact and resident involvement strategy now agreed</li> <li>• High degree of publicity for formal and informal activity</li> <li>• Increased involvement of younger residents through board representative, At Home editorial board, Respect Fest; disabled people involved through Forum and DIT; Black and Minority Ethnic groups involved through board champion, plus range of other informal activities</li> <li>• Reasonable balance achieved between different groups</li> </ul>

## Appendix 2 – Progress against our 2005 recommendations

Recommendation	Action
<ul style="list-style-type: none"> <li>● within 12 months developing a clear resident involvement strategy with tenants and leaseholders which sets out the aims of resident involvement within PHP and review the exiting compact to reflect the new status of PHP and changes in resident involvement.</li> </ul>	
<p>Minimise the risks to service delivery and improvement within 12 months by:</p> <ul style="list-style-type: none"> <li>● developing a long term strategy for PHP involving tenants, the board, staff, the Council and other key partners in the community;</li> <li>● developing a set of consistent action plans for strategic direction and service improvement. Develop medium and long term targets within plans which reflect the opinions of a wide range of tenants and which are focussed on service outcomes for tenants and leaseholders; and</li> <li>● developing a systematic and consistent approach to learning from internal and external experiences including an analysis of areas of service strength and weakness and service focussed outcomes form benchmarking analysis.</li> </ul>	<p>Partially achieved</p> <ul style="list-style-type: none"> <li>● The current business sets out the direction of PHP to 2011, but the medium to long term strategy is subject to the options appraisal.</li> <li>● There is a rational hierarchy of plans and service plans though these do not stretch beyond 2011.</li> <li>● PHP makes excellent use of learning and benchmarking.</li> </ul>

# Appendix 3 – Reality checks undertaken

- 1 When we went on-site we carried out a number of different checks, building on the work described above, in order to get a full picture of how good the service is. These on-site reality checks were designed to gather evidence about what it is like to use the service and to see how well it works. Our reality checks included:
  - a document review of the plans, performance reports, policies and a self assessment completed by PHP;
  - focus groups of tenants, staff, stakeholders, contractors and board members;
  - interviews with senior managers and board members;
  - estate walkabouts and a tour of the Borough; and
  - telephone interviews with new tenants and other service users.

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# Appendix 4 – Positive practice

**'The Commission will identify and promote good practice. Every inspection will look for examples of good practice and innovation, and for creative ways to overcome barriers and resistance to change or make better use of resources'. (Seeing is Believing)**

## **Services for disabled tenants**

Disabled people are well represented in all working parties and have a disability forum looking after their interests. A special edition of 'At Home' is targeted at disabled tenants and their carers. PHP offices are accessible, welcome attendance dogs, have accessible toilets, a hearing loop and parking spaces for disabled people adjacent to the entrance. The planned maintenance, repairs and lettings services identify tenants and prospective tenants with disabilities and any improvement and void repair work is tailored to their needs, with the benefit of in-house occupational therapists. This means that access to adaptations is easy for tenants who might not otherwise know of or approach the service. 300 tenants a year have accessed the service in this way in the past two years and benefit from an exceptionally speedy response to both minor and major adaptations. There is also an in-house tenancy support service, a handyperson service and a strong link to the Poole Intermediate Care service, all of which improves the quality of life of disabled tenants.

## **The role of caretakers**

The work of caretakers in Poole goes well beyond the traditional caretaking role. Among the tasks that they undertake are helping residents to overcome any fear of lifts; directing residents to help in dealing with anti-social behaviour and liaising with the Safer Neighbourhood Team; advising residents about utility bills and meter reading; dealing with emergencies; arranging furniture recycling and residents on low incomes to the food bank - where one of the caretakers is a volunteer. It would be impossible to include all of this on a traditional job description. This reflects a high degree of flexibility and a strong customer focus to this service, which residents appreciate.

## Appendix 4 – Positive practice

### Informal Resident Participation

The Respect Fest is an excellent example of informal resident participation. The event is now held annually at the centrally located Poole Speedway stadium and is well publicised, with a range of entertainment to entice residents in. These included a free fly past by the Red Arrows and activities that brought together older residents and young people. In 2007 the theme was the Respect initiative to reduce anti-social behaviour; in 2008 the theme was deliberately more positive; to celebrate talent. Other organisations such as the libraries, children's and fire services are now also taking part. The Sunday event is organised and attended by a large number of PHP staff. It has proved to be a very effective way of consulting residents by carrying out roving surveys on themes such as estate improvements and what interests residents most. A resident involvement stand encourages people to get involved in whatever way that suits them best. Around 640 residents attended the latest event, along with 40 businesses, voluntary groups and statutory agencies, all of whom gained benefits from it. 21 residents expressed the wish to get more involved. For the Police it was about sending the message that everybody is working together to address anti-social behaviour; for the Credit Union it generated enquiries and helped to publicise the service. Sponsorship was used to meet the cost of hiring the stadium and most of the expenses for the day.

### How multi-agency working has transformed the reputation of an unpopular estate

The Turlin Moor estate had a poor reputation some five years ago, with high levels of anti-social behaviour and the appearance of the estate blighted by vandalised cars and graffiti. Demand for homes on the estate was relatively low and empty homes added further to the poor appearance of the estate. PHP has worked in partnership with the Police, environmental health and education services to target the perpetrators and provide positive alternatives to criminal and anti-social behaviour. A zero-tolerance and rapid response was introduced to abandoned cars and graffiti. Anti-social behaviour orders and Police prosecutions have resulted in the removal of some perpetrators from the estate. Work by the two local schools has resulted in a major improvement in educational achievement, with the schools now among the top performers in the County and about to merge to form a community school. This will help to address a longer-term need for community facilities, since although the estate is located in a very attractive setting and is served by shops and public transport, it has no community hall. The results of this work is now that demand to live on the estate is high (with choice based lettings encouraging those people who are most keen to live on the estate) and there is no evidence that the anti-social behaviour has simply shifted to another part of the Borough. Some tensions remain, for example over decisions in respect of the community hall, but local residents told us that the estate is 'a million miles ahead' of what it had been a few years ago.

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# The Audit Commission

The Audit Commission is an independent watchdog, driving economy, efficiency and effectiveness in local public services to deliver better outcomes for everyone.

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