

22/23

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Performance Self-Evaluation



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A photograph of two women standing behind large, purple, geometric blocks. The woman on the left has short brown hair, wears glasses, a blue cardigan, and a teal top with a black floral pattern. The woman on the right has dark hair, wears a dark brown cardigan, and a pink top with a small floral pattern. They are both smiling. The background is a light grey wall with a blue curved shape in the top left corner. The purple blocks are in the foreground, partially obscuring the women.

OUR COMMITMENT TO YOU...

We will always aim to deliver...

the right service outcomes, efficiently
with **great customer experience...**

for the people and communities of
Wast Wales.

Purpose of this Performance evaluation

The Welsh Government Regulatory Framework operates on a co-regulation basis and focuses on nine performance standards. During 2022, the Welsh Government carried out a Transitional Regulatory Review of our compliance against the nine standards with the following outcome:

- **Governance** (including tenant services): Compliant - Green
- **Financial Viability**: Compliant - Green
- **RS8** - Assets and liabilities are well managed.
- **RS9** - The organisation provides high quality accommodation.

The full judgement is available on our website www.atebgroup.co.uk

The nine Regulatory Standards are as follows:

- **RS1** - The organisation has effective strategic leadership and governance arrangements which enable it to achieve its purpose and objectives.
- **RS2** - Robust risk management and assurance arrangements are in place.
- **RS3** - High quality services are delivered to tenants.
- **RS4** - Tenants are empowered and supported to influence the design and delivery of services.
- **RS5** - Rents and service charges are affordable for current and future tenants.
- **RS6** - The organisation has a strategic approach to value for money which informs all its plans and activities.
- **RS7** - Financial planning and management is robust and effective.

This review evaluates the quality of our organisation's performance by giving an overview of our performance as well as demonstrating how well we are delivering on the following Welsh Regulatory Standards:

- **RS3** - High quality services are delivered to tenants.
- **RS4** - Tenants are empowered and supported to influence the design and delivery of services.
- **RS4** - Rents and service charges are affordable for current and future tenants.
- **RS9** - The organisation provides high quality accommodation.

The performance evaluation forms part of the following suite of self-evaluation documents, which each cover a few of the standards and collectively detail how we meet the Regulatory Standards:

- **Governance** - RS1, RS2
- **Performance** - RS3, RS4, RS5 and RS9
- **Financial** - RS6, RS7 and RS8
- **Improvement Plan**



The above documents will provide an evaluation of our organisation's governance by demonstrating how...

- The Board knows the organisation complies with each regulatory standard, including reference to key performance data and sources of assurance.
- We comply with the Code of Governance that the organisation has adopted.
- We have used the principal evidence which has been relied upon in conducting the evaluation.
- The process of evaluation has been robust.
- The needs and views of tenants have been understood and considered as part of the self-evaluation.
- We have identified our key strategic risks and associated controls, or signposted to other documentation where the key risks are articulated.
- Our continuous improvement plan identifies any gaps or areas for improvement and shows how these will be addressed (this replaces the Regulatory Assurance Plan).



A Board overview of 22/23

This is our self-evaluation of our performance against those regulatory standards most directly connected with customer service. The Welsh Government's regulatory standards quite rightly focus on our customers, as that is the reason for our existence. Making sure we deliver the right services at the right time, has never been more difficult given the environment we have been operating within over the last year. We have delivered a lot of great services but there is always more to do.

A Board overview of 22/23

I hope you will agree that a lot has been achieved and as in previous years, our performance has been positive overall. This has been against a backdrop of supply chain, recruitment, regulation changes, and adoption of new post covid working arrangements. In the case of the Renting Homes Wales Act, pretty much all of our customer and repairs systems needed to be changed in some way to accommodate the new legislation. The Boards are aware that the teams have had to work harder to stand still, which is a dynamic being faced by a lot of the service sectors. We continue to build and let new homes, help customers to keep their arrears low and keep our customers' homes safe and secure.

Over the last year we have met and received a lot of feedback from our customers and collectively, they want us to reflect on how we communicate with them and how we deliver repairs. Customers felt we could be clearer, more timely and more focused with communication across our service areas and they said that more could be undertaken to provide a better repairs service. The Board welcomes the feedback as does the team, and have added these areas to our updated improvement plan.

Mill Bay Homes had another extremely positive year where Sageston Phase 1 was all but sold, along with the final homes at our Templeton site. We are pleased to report defects management has been improved with very positive responses from those customers on the receiving end of the new approach. West Wales Care & Repair beat their key income targets, that allowed them to undertake more activity than they had planned in some of their key service areas. As per normal, they helped 1000's of West Wales' older and more vulnerable customers live independently.

It's not been an easy year to be our best, but through the efforts of the team and support of their Boards and partners, we hope our customers have remained satisfied with the services we have delivered. I certainly hope that operating stability will return allowing us to concentrate on pushing our performance further. Thank you to everyone involved in providing services across the ateb Group and to our customers for sticking with us during these uncertain times.

David Birch

Chair of ateb
Group Limited



High quality services are delivered to tenants

We have 38 service areas across our Group, of which 16 have been identified as 'customer facing', they are as follows:

Customer Facing Services

Customer Facing Service Areas	Outcomes
Lettings	All properties let, all of the time
Income Collection	All rent collected on the due date
Customer Advice & Support	Address and resolve customer enquiries / requests at first point of contact
Maintenance	Fix issues to the customer's satisfaction
Shared Spaces Management	Our shared spaces are clean, well-kept, and safe environments
Compliance Works	All properties are compliant with legislative requirements
Planned Improvement	Improvement programmes delivered to the customer's satisfaction
Customer Engagement	That we improve service delivery through customer experiences
Tenancy Management	We have helped to create a great place to live
Community Development	Our communities are empowered, supported, and engaged
Independent Living	We improve the wellbeing of customers who require additional support
New Homes (land & construction + MBH Sales)	Develop the best homes possible for the long-term benefit of our customers and communities and maximise MBH's return for the benefit of ateb Group priorities
WWCR – Customer Advice & Support	Enabling people to live independently in their own homes
WWCR – Rapid Response	Prevent admission to hospital/care or get people out of hospital/care and into their home by agreed discharge date
WWCR – Adaptations	Enabling people to live independently in their own homes
WWCR – Technical Services	Generate income to support core activities

Customer Outcome Management

Our ateb Vision sets the expectations for all our Group customer services. Focussing on what our customers expect as an outcome, we then design and deliver services to achieve that expectation:

Customers should expect ateb to...

“Always deliver the right customer outcomes as effectively as we can.”

Customer Outcome Management is the process of aligning everything we do to achieving successful customer outcomes, plus the experience associated with each outcome e.g.:

- In a timely manner
- Positive feeling
- Cost effective
- Meets our social responsibility

The concept will dictate how we invest, evolve our services, develop our processes, and define our structures, i.e., the customer is at the heart of everything we do.

So, what should our services feel like to our customers?

- **Outcome** - Customers should receive service outcomes that meet their expectations on first contact wherever possible. Where we can't, we should have clear reasons why it's not possible and what we can do to assist further or alternatives we can offer, learn, and improve.
- **Effectiveness** - Customers should receive outcomes as quickly as possible, to a high-quality standard and without the need for multiple interactions. Where we can't, we should be clear on the time frame that is possible, why the quality is not as expected and why we need to refer to someone else. We should always learn and improve.
- **Experience** - Customers should always have a positive experience when interacting with our services. We should understand where this is not the case, learn and improve.



Operational framework

To achieve the above, we use our 'Deliver' operational framework to shape and manage what we do. Deliver has been developed using lean and system thinking principles where customer outcomes dictate service delivery design. Process mapping and management then ensure the required outcomes are delivered as effectively as possible whilst monitoring risk and identifying improvement.

The whole Group is covered by our Deliver framework, whether the service area is customer facing or a support service. Deliver is a long-term proposition that will need a concerted effort to fully embed within the Group.

The Welsh Government Tenant Satisfaction Survey

All social housing providers, including Local Authorities, in Wales are required to undertake the Welsh Government's tenant satisfaction survey a minimum of every 2 years, asking their tenants 12 standard questions.

In 2021/22 we undertook the survey with ateb customers. Up to 40% of ateb customers responded.

Welsh Government has published a league table of how ateb compares to other providers in Wales following the return of survey data for 2021/22. ateb performance, when compared to the sector, has improved considerably where comparable data is available since we last undertook the survey in 2019. We will be undertaking the survey again in Quarter 3 of 2023/24.

QUESTIONS		RANK IN 2022 (Sum of very or fairly satisfied)	RANK IN 2019
1	How satisfied or dissatisfied are you with the service provided by your social landlord?	7 th	21 st
2	How satisfied or dissatisfied are you with the overall quality of your home?	5 th	19 th
3	Generally, how satisfied, or dissatisfied are you with the way your social landlord deals with repairs and maintenance?	8 th	15 th
4	How satisfied or dissatisfied are you with your neighbourhood as a place to live?	9 th	21 st
5	How satisfied or dissatisfied are you that your rent provides value for money?	8 th	25 th
6	How satisfied or dissatisfied are you that your service charges provide value for money?	10 th	Not Available
7	How satisfied or dissatisfied are you that your social landlord listens to your views and acts upon them?	16 th	20 th
8	Thinking about your home specifically, how satisfied, or dissatisfied are you that your social landlord provides a home that is safe and secure?	13 th	Not Available
9	How satisfied or dissatisfied are you with the way your social landlord deals with anti-social behaviour?	5 th	Not Available
10	How satisfied or dissatisfied are you with opportunities given to you to participate in your social landlord's decision-making processes?	20 th	Not Available
11	How satisfied or dissatisfied are you that your social landlord gives you a say in how services are managed?	22 nd	Not Available
12	To what extent do you agree with the following statement - "I trust my social landlord"	11 th	Not Available

Green = top 25% | Yellow = top 50% | Red = bottom 50% (of a total 46 providers)

Welsh Government Regulation Survey

On a quarterly basis during 2022/23, ateb completed and returned a survey to Welsh Government on our operational and financial performance. These surveys were then reviewed by our Regulator, and a sector comparison report published. Our end of year performance showed the following:

	ateb	SECTOR
Current tenant arrears as a % of annual rent roll	2.5%	TBC
Current tenant arrears as a % of annual rent roll (self-payers only)	0.8%	TBC
Current tenant arrears 8 to 12 weeks	3%	TBC
Current tenant arrears 13 to 25 weeks	1.8%	TBC
Current tenant arrears 26 to 52 weeks	0.4%	TBC
Current tenant arrears 52 weeks plus	0%	TBC
Gas Safety compliance	99.8%	TBC
Fire Risk Assessments compliance	100%	TBC
Electrical Safety compliance	97.1%	TBC
Asbestos compliance	100%	TBC
Water Hygiene compliance	100%	TBC

ateb compared favourably when looking at performance across the sector.



High Quality Services Assessment

We have assessed our customer facing services over the last year as follows:



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Letting Homes

We aspire to making sure our homes are always let.

In Facts:	18/19	19/20	20/21	21/22	22/23
New homes made available	102	101	112	64	59
Number of homes relet (including mutual exchanges and transfers)	291	268	204	244	209
Average days to relet a home	6.6	5.9	59	17	64
% of rent lost due to empty homes as a % of annual rent roll	0.2%	0.2%	1.3%	0.6%	1%

Our assessment of the year:

We continued to see high levels of customer satisfaction, with 100% of people who responded and were let a home during 2022/23, telling us they were satisfied with the lettings process, a small improvement on performance in 2021/22. 100% of customers who responded told us they were satisfied with their home and the community it was situated in, 4 weeks after moving into their home.

We supported Pembrokeshire County Council in meeting the needs of people identified as homeless, with 49% of homes let in 2022/23 allocated to people who were accepted as priority need homeless by the Local Authority.

We reviewed all policies and processes during 2022/23 pertaining to letting homes, in readiness for Renting Homes Wales Act (RHWA) go live in December 2022, this included a review of our void standards to ensure that our homes met the Fit for Human Habitation Standards at the point of let.

We saw a significant increase in the average days taken to relet a home and the % of rent loss due to empty homes in part, due to the implementation of new processes to meet the requirements of the RHWA. A lack of availability of suitable contractors to carry out void works has also had an impact.

Key areas we are planning to work on to improve:

- We will implement a pre-occupancy assessment for all new customers allocated a home to ensure we have identified any support needs prior to moving into their home.
- We will review and embed the new processes implemented as part of the RHWA with the aim of identifying further improvements and reducing the average number of days taken to relet a home.
- We will work with our partners to review the Choice Based Lettings policy for Pembrokeshire and implement any required changes to our systems and processes.



Income Collection

We want our customers to be able to afford and pay their rent on time.

In Facts:	18/19	19/20	20/21	21/22	22/23
Rent received (Inc. Service Charge) £M	14,781	15,747	16,175	16,948	17,659
Current tenant arrears as a % of annual rent roll	0.60%	1.7%	1.6%	1.9%	2.5%

Our assessment of the year:

It was a difficult year for our customers. Customers told us that they were struggling with the rising cost of living. In response to these challenges and the increased risk of our customers not being able to pay their rent, being in fuel poverty and struggling with day to day living costs, customers and ateb team members came together in October 2022 to co-produce ideas and solutions to ensure that ateb was doing all it could to support those living in an ateb home and minimise the risk of tenancy failure.

The key message to customers was that if they were struggling to keep on top of bills, pay their rent or heat their homes, that they should contact ateb quickly to ensure that income was maximised and all the help and support available was being provided.

In response to what our customers told us we carried out the following:

- Through grant funding we employed a dedicated Home Energy Officer. The grant funding ends in July 2023, and ateb has agreed to fund the role to at least 31st March 2024 given the current pressures our customers face.
- Our Home Energy Officer contacted customers who lived in an ateb home that had been identified as not very energy efficient (EPC D or below) to provide targeted energy saving advice and support.
- Our Home Energy Officer provided energy advice and support to 333 distinct ateb households between April 2022 and March 2023.
- We used our living rent methodology when setting rents and service charges for 2023/24, however we knew some people who live in an ateb home may still struggle to pay their rent and service charge, therefore we introduced a financial assistance fund to provide financial support to those struggling to pay their bills. 38 ateb households received financial assistance from ateb through the fund – averaging £197.50 per household.
- We have carried out a review of rents and service charges for people who live in our Independent Living Schemes, that concluded ateb rents and service charges were at the lower level when compared to other landlords.

In response to what our customers told us we carried out the following:

- We surveyed customers on their cleaning service and other service chargeable contracts and several improvements were identified with actions being taken forward.
- We did not evict any one from an ateb home due to rent arrears for the third consecutive year and minimised the use of court action, taking a support first approach.
- We provided 3,801 money advice and support interventions during the year.
- We joined the Fuel Bank to enable ateb customers to access emergency financial support with energy costs.
- We secured grant funding from Welsh Government to invest in some of our homes, so they are better equipped to bring down household bills by making them more energy efficient. Works will start during financial year 23/24.
- We completed a review of our Housing Solutions Team, reducing the number of homes each individual team member has in their area, making it easier for customers to access holistic advice and support.
- We regularly promoted through our social media channels how our customers could access support from Food Banks, and we supported our partners at PATCH by delivering Christmas food and toy parcels to 30 households in time for Christmas.
- We regularly promoted through our social media channels how our customers could access warm community spaces and we distributed Winter Warm Packs to households across Pembrokeshire, including people who live in ateb homes. We distributed 600 packs over the winter period.
- We held 2 events in February 2023 involving key partners, to provide advice and support on dealing with the rising costs of living along with advice on improving wellbeing and healthy living initiatives.
- We joined the National Databank who provide free mobile data to those who need it by providing free sim cards or vouchers.

Inevitably our income collection performance worsened throughout the year, however with the support provided to our customers we were able to minimise that impact. 98.4% of rent due was collected and current tenant arrears at the year-end stood at 2.5%, an increase of 0.6% on financial year end FY 21/22. Former tenant arrears as a % of annual debt has remained relatively static over the last 4 years.

Key areas we are planning to work on to improve:

- We will embed our “support first” approach in our income collection processes to prevent homelessness wherever possible, as well as mitigating the impact of planned and future welfare reforms.

Customer Advice and Support

We want our customers to be able to access the right advice and support to maintain their contract.

In Facts:	18/19	19/20	20/21	21/22	22/23
Reception visits	14,319	10,280	0	0	0
Phone calls handled	59,497	57,666	27,000	31,147	31,620
Out of hours calls handled	2,986	2,313	2,246	4,637	3,750

Our assessment of the year:

The Customer Services Team received 31,620 calls during 2022/23. 88% of calls received during office hours were answered, with 12% of calls being missed or abandoned. The average time taken to answer a call was 20 seconds.

We launched our digital customer portal in the latter part of 2021/22 with the aim of increasing the number of options for our customers to contact us. As at the 31st of March 2023, 689 customers, 22% of ateb households, had signed up to the portal.

Key areas we are planning to work on to improve:

- We are aiming to further increase the number of customers registered to use the customer portal – enabling a channel shift from telephone customer contact and letters sent by ateb, so that customers have a variety of ways to contact ateb that suits them, and view documents relevant to their home e.g., compliance certificates, planned work schedules.
- We will review our telephone system requirements to enable us to gather and report the data needed to inform service improvements.
- We will review and upgrade our website online form system in favour of newer technologies that not only allows us greater control of forms and their content, but also generates a copy of forms returned to our customers as a form of receipt.



Maintenance

We want to get things fixed to your satisfaction.

In Facts:	18/19	19/20	20/21	21/22	22/23
Repairs completed	11,691	12,616	8,036	8,772	10,886
Satisfaction with repairs (ateb)	99.1%	99.7%	N/A	99%	100%
Repairs % by partner contractors	17.7%	23%	20%	17%	31%

Our assessment of the year:

It has been a challenging year with increased demand, lack of availability of suitable contractors and difficulties to recruit to vacancies in the ateb maintenance team. This has led to a longer than usual number of days taken to complete a routine repair - 21 days, an increase of 11 days when compared to 2021/22.

Despite the challenges, we have continued to see a very high level of satisfaction with our ateb maintenance teams where they have carried out the repair, and 99% of all emergency repairs were completed to the agreed timeframe of 24 hours maximum.

We reviewed all existing policies and process to ensure compliance with the new Renting Homes Wales Act legislation. This included a review of our void standards, and we implemented several improvements to ensure we adequately and appropriately responded to reports of damp and mould. However, we have more to do to embed our pre and post inspection processes of contractor works.

In October and November 2022, we surveyed customers on the delivery of maintenance services where we use external contractors. We received 206 responses that were reviewed by

the ateb team and customers, and as a result co-produced 6 improvement actions.

- Re-communicate and promote ateb Contractor Code of Conduct responsibilities.
- Consider how customer satisfaction is gathered and reported following works completed by external contractors.
- Establish regular contract monitoring meetings that are recorded.
- Contract monitoring meeting schedules to be created.
- Review how customers are consulted with about planned works.

These improvement actions have been incorporated into the Association wide sponsored improvement project referenced below.

Key areas we are planning to work on to improve:

- Customers have told us that a key area of improvement for them is how we deal with repairs. We will deliver an Association wide sponsored improvement project aimed at creating the right process supported by the right resources, delivered by the right skills and experiences.

Shared spaces

We want every customer to experience clean, well kept, safe, shared environments.

In facts and figures.

- 100% of play areas had their weekly, quarterly, and annual safety inspections completed.
- 100% of communal spaces had an annual asbestos inspection where this was required.
- 100% of properties with communal fire alarm and emergency lighting installations had an in-date servicing record.
- 100% of properties that require one had an in-date Fire Risk Assessment including “walk-up” of flats.
- A regular cleaning service was provided at 56 shared internal spaces.
- Grounds maintained at 152 sites.

We surveyed customers to find out if they thought that the service charge they paid to provide shared services, provided good value for money, this is what they told us.

- 82% of customers told us that they were satisfied that the service charge they pay to clean and maintain shared spaces provided value for money, with 18% telling us they were dissatisfied
- 45 customers have told us they were not happy with the quality of grounds maintenance service provided.
- 8 customers told us they were not happy with the quality of cleaning service provided.

Our assessment of the year:

We continued to prioritise ensuring our shared spaces were safe, clean, and well maintained. Whilst 82% of customers are satisfied with services provided, 18% are telling us that they want to see improvements to cleaning and grounds maintenance services delivered by our contractors. A priority this year will be to work with our contractors and customers on service improvements.

Key areas we are planning to work on to improve:

1. In January we carried out a detailed survey with our customers on the quality of cleaning services they received. We had 190 responses that were reviewed by the ateb team and customers who co-produced the following improvement actions.
 - Review the window cleaning specification for those homes where customers said they were not satisfied
 - Review communal cleaning specifications to lessen the potential for ambiguity in what needs to be delivered
 - Improve contractor performance monitoring across all shared spaces contracts, identifying ways to involve customers in monitoring and reporting on performance.
2. We intend to carry out a similar exercise during 23/24 to co-produce improvement actions with customers relating to the grounds maintenance service provided.

Compliance

All properties are compliant with the required regulations.

In facts (as at year end):	20/21	21/22	22/23
Gas Certification	100%	99.9%	99.8%
Electrical Inspections	99.8%	100%	97.2%
Lifting equipment inspections	91.8%	100%	95.1%
Visual asbestos inspections	89.5%	100%	100%
Smoke Alarm inspections	100%	99.9%	95.8%
Domestic Fire Sprinklers	84.2%	99.1%	98.5%

Our assessment of the year:

We continue to prioritise the safety of our customers' homes through our programme of landlord health and safety inspections where these are required.

We continued to see high levels of compliance across all ateb homes, however, access issues to some customer homes meant 100% compliance was not achieved. We employed a Compliance Surveyor for Fire Safety during 2022/23, to improve our response to all fire safety matters.

We commenced a programme of bringing all homes into a 5-year cycle of EICR tests and aim to complete by 30/11/2023.

We reviewed our processes to ensure customers were provided with evidence of all safety inspections completed at point of letting a home.

Key areas we are planning to work on to improve:

- We will bring all homes into a 5-year cycle of EICR tests by the end of November 2023.



Planned Improvements

We want our improvement programmes delivered to the customer's satisfaction

In facts (as at year end):	18/19	19/20	20/21	21/22	22/23
Kitchens fitted	54	50	19	25	108
Bathrooms fitted	103	71	16	182	81
Windows & doors fitted	315	149	114	305	65
Heating systems replaced	65	48	12	40	5
Boundary replacements	31	113	110	97	73
Homes painted	446	299	333	389	479

Our assessment of the year:

Following a period of disruption to our planned works programme due to the pandemic, services were able to return to normal during 22/23. We invested £2.08m in our homes through planned works and painted 479 homes at a cost of £344k.

We undertook a programme of post inspections and reviewed specifications of works to ensure they were aligned to new and pending legislation.

- 96% of customers who responded to our survey told us they were satisfied with the works when they had their kitchen replaced.
- 95% of customers who responded to our survey told us they were satisfied with the works when they had their bathroom replaced.

Key areas we are planning to work on to improve:

- On confirmation of the new Welsh Housing Quality Standards (WHQS) we will review planned maintenance specifications and programme to ensure they are aligned to WHQS23.



Tenancy Management

We have helped create a great place to live.

In facts (as at year end):	18/19	19/20	20/21	21/22	22/23
Total ASB reports	152	152	344	171	318
Low level nuisance	114	137	320	156	285
Required intervention from ateb	30	15	18	14	25
Required a multi-agency approach	8	0	6	1	8
Customer satisfaction with how we dealt with ASB	72%	95%	N/A	98%	74%

Our assessment of the year:

We continued to take a supportive rather than legal approach to tenancy and community management issues during the year, resulting in very low reports of tenancy failures, with 0 evictions and only 1 abandonment during 2022/23.

We received an increased number of reports of Anti-Social Behaviour during 2022/23 when compared to the previous year, however this could be due to the implementation of the ASB case management module within our new housing management system and therefore more effective reporting rather than a significant increase in number of ASB incidences in our communities.

Most cases reported were for low-level nuisance, and we continued to see high levels of customer satisfaction on the closure of each case where complainants have responded.

74% of customers who responded on closure of the case, told us they were satisfied with how their ASB complaint had been handled, 23% reported they were neither satisfied or dissatisfied, whilst only 3% of complainants told us they were dissatisfied.

We reviewed team roles, responsibilities, and structures during 2022/23, reducing the size of areas overseen by each member of our Housing Solutions Team, to ensure that we can provide the necessary engagement and support where customers are identified as at risk of occupancy failure.

We reviewed all tenancy agreements, policies and processes relating to tenancy management to ensure compliance with the Renting Homes Wales Act.



Community Welfare Project

ateb secured lottery funding to deliver a 2-year Community Welfare Project that started in April 2022.

The project has 3 main objectives.

- Enhancing personal wellbeing
- Promoting digital inclusion
- Reducing financial hardship through support with Universal Credit applications and online job applications

During 2022/23 the funding has helped ateb to.

- Provide one to one digital training and ongoing support to connect with family and friends to access services and improve wellbeing.
- To run computer clubs and digital training for older people in Independent Living schemes and individuals living in the wider community.
- Deliver food intervention parcels to those in need in the community.
- Provide digital support and training at public events across Pembrokeshire.
- Provide digital support to those in need to complete online Universal Credit claims and ongoing account management support.
- Deliver and manage an IT library of equipment for those with no digital equipment.

A copy of the full 22/23 Community Welfare Project evaluation report can be viewed here: <https://www.atebgroup.co.uk/wp-content/uploads/2023/08/National-Lottery-Report-2023-2024.pdf>

Key areas we are planning to work on to improve:

- We will introduce an annual occupancy review with the aim of knowing and understanding our customer expectations.



Supported living

Promoting wellbeing of customers who require additional support.

In facts:	19/20	20/21	21/22	22/23
Total support hours delivered	2090	2285	2475	2585
Number of older people supported in Independent Living schemes (weekly average)	61.5	74	56	53
Number of older people supported in the community (weekly average)	9.8	21	25	19
Number of Community Alarms installed	69	44	25	24
Number of ateb customers to benefit from minor adaptations to home and total value of investment	Not available	Not available	70 (£16k)	84 (£16K)
Total number of Supported Living projects	40	40	41	46

Our assessment of the year:

We reviewed the management and lease agreements with supported living providers and leaseholders, developing a new standard contract for all lets in our supported living accommodation to ensure compliance with the Renting Homes Wales Act.

There was a lot of activity throughout the year to support older and vulnerable people in their homes, from the installation of a community alarm, minor physical adaptations to advice and support in sustaining a tenancy.

Key areas we are planning to work on to improve:

- We will train our Independent Living Co-ordinators to be Trusted Assessors, to enable ateb to respond quickly to customers requiring adaptations.





New homes

Develop the best homes possible for the long-term benefit of our customers and communities.

In facts:	18/19	19/20	20/21	21/22	22/23
ateb homes completed	102	101	112	64	59
SHG received	£5,109,891	£4,170,076	£4,348,233	£6,936,250	£15,539,213
MBH gift aid recycled from open market sales	£1,304,882	£1,066,259	£2,664,085	£1,914,928	£1,466,676

Our assessment of the year:

ateb's Development team have continued to progress new sites and build new homes of various tenures despite the difficult trading times created by the pandemic and other global factors, to endeavour to meet both the Group's new homes aspirations together with that of Welsh Government.

Over the past year our teams have delivered a range of new homes to our customers. Unfortunately, the number of homes completed has missed our initial projection and progress has undoubtedly been thwarted, especially in terms of final scheme completion, due to the shortage and availability of both materials and labour.

Key areas we are planning to work on to improve:

- Project delivery and management.
- Increase our exposure to new contracting partners.
- Continue to develop joint venture partnerships.

West Wales Care & Repair

West Wales Care and Repair (WWCR) has continued to deliver an essential service to older people across Pembrokeshire and Ceredigion. Supporting older people to remain independent in their own homes, preventing hospital admissions and supporting hospital discharge.



In facts:	18/19	19/20	20/21	21/22	22/23
People helped with rapid response adaptations	1,165	1,514	1,284	1,306	1,730
Home Safety assessments	648	696	480	579	756
Customers supported to maximise income	44	62	99	131	44
Additional customer income raised £	£259k	£343k	£497k	£645k	£262k
Customers satisfied with our service % (rapid response service)	97	99	98.5	99%	100%
Customers who told us their quality of life had improved % (rapid response service)	94	96.5	80.5	82%	94%
Customers supported by handy person services - Pembrokeshire	357	348	146	160	98



West Wales Care & Repair

Our assessment of the year:

In 2022/23 we saw an increase in the demand for the Rapid Response Adaptations Programme (RRAP) and Casework services. The 83% increase in RRAP capital funding allocated for 2022-23 and the additional £42k funding secured in year, demonstrates that the contribution WWCR makes to the prevention agenda and facilitating hospital discharge is recognised.

There has also been recognition of the contribution made by the PIVOT service in preventing admission to hospital and reducing the length of stay in hospital.

WWCR increased its turnover by 11%, working in partnership with 3rd sector and local authority partners to deliver new services, attracting additional funding in year.

Key areas we are planning to work on to improve:

- We will invest in the right IT equipment for our team to deliver services effectively.
- We will explore options for improving engagement with our customers to understand all their needs, to help them live independently in their own homes.

We ended the year supporting more customers than in the previous two years and delivering a positive variance to budget. The Welsh Government has confirmed a 6% revenue increase for 2023-24 enabling us to increase our resources to meet demand and continue to provide a holistic, person-centred services during the coming year.

We will continue to receive income through the Housing with Care Fund to support our practical services and explore other opportunities that support our strategic objectives.

Customer satisfaction remains high, and the services delivered continue to have a positive impact on the lives of older people across Pembrokeshire and Ceredigion.



Customer Feedback

Our customer feedback in the year has generally been positive, please note the following breakdown:

	2021/22	2022/23
Expressions of Dissatisfaction resolved informally	44	63
Formal complaints resolved at stage 1	7	7
Formal complaints resolved at stage 2	1	4
Formal complaints escalated to Ombudsman / Information Commissioners Officer (ICO)	2	1
Disrepair claims (received in year)	4	0
Compliments	27	73

We did not identify any common themes in the customer feedback received. Formal complaints received were resolved to the satisfaction of the complainant. One complaint was escalated to the Public Services Ombudsman but was not upheld.

Summary

Based on our assessment of our Group's customer facing services we believe that we have delivered high quality services to customers.





■ RS3 – FY 23/24 EVALUATION CHECK

“High quality services
are delivered to tenants”

We have made the following evaluation:

Our Board has reviewed our analysis and evidence and consider we are compliant with this performance standard.

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

- Concluded our Group customer commitment set out in #1 Purpose, is to 'always aim to deliver the ... right customer outcomes as effectively as we can ... for the people and communities of West Wales
- Concluded our #4 Deliver document details our service delivery approach, which is based on customer outcome management and aims to ensure individual customer needs are met. Through our 38 service areas across the Group, we work to ensure we are delivering the right outcome to our Group customers and provide them with the services they expect and need

2. What was the principal evidence used to evaluate this standard?

The Board has:

- Considered the following key evidence for this standard:
 - Monthly Board Performance Reports
 - Welsh Government Tenant satisfaction survey results
 - WG Regulatory performance survey sector reports
 - Bi-annual Customer Feedback – Board Report
 - Internal Audits

Is there improvement planning in place?

The Board has:

- Ensured our Improvement Plan includes the following actions for FY 23/24:
 - IP005 - We will carry out an Equalities Impact Assessment on our 1st point of contact services and develop a plan to deliver improvements identified. (Customer) (RS3)
 - IP014 - Agree and set up options for hot desking/desk spaces with potential co-location opportunities with health, housing, and social care. (Customer) (RS3)
 - IP019 - We will complete our phase 2 Customer Services Team review, which will include how we handle repairs. (Customer) (RS3)
 - IP024 - Implement post inspection procedure in full including independent QA inspections. (Customer) (RS3)
 - IP025 - Improve our WWCR IT systems to ensure that performance reporting is fully functional. (Customer) (RS3) (Customer) (RS3)

Tenant empowered approach

Our Vision clearly sets the need for the Group to focus on customer outcomes. To achieve this aim, we must always listen and understand our customers' demands to ensure that our delivery meets their expectations.

ateb Vision - Purpose | What you can expect from us.

Our ateb Vision sets out our purpose and what our customers should expect of us. In summary we aim to:

- always try to meet our customers' expectations; but if we can't we explain why and try to help where we can.
- let our customers have their say in what we do and how we do it.
- treat you as an individual.
- always work to provide solutions and if we can't, we explain why and offer suitable alternatives.
- be honest about what we know and what we don't know and will make sure you know what to expect from us.

Customers should expect us to:

- Pay attention to their circumstances.
- Take time to understand their needs.
- Show empathy in our responses.
- Help resolve their issues.

Customer Outcome Management

Our ateb Vision sets the expectations for all our Group customer services. Focussing on what our customers expect as an outcome, we then design and deliver services to achieve that expectation.

Customer engagement

That we improve service delivery through customer experiences.

In facts:	18/19	19/20	20/21	21/22	22/23
Customers engaged	1,170	1,615	1,824	1,627	1,990
Improvement actions identified	31	56	43	16	9
Improvement actions implemented	21	26	48	34	9
Improvement actions ongoing	10	30	38	28	9

Our assessment of the year:

We commissioned TPAS Cymru during 22/23 to provide an independent improvement and advisory audit assessment of our current approach to Customer Engagement to help us understand:

- 1,990 (1,682 responding to surveys) customers were engaged through surveys, forums, and conferences.
- We continued to identify operational improvement actions through our customer engagement activities, implementing 9 service improvements during the year.
- 61% of our customers told us in the year that they were satisfied with the opportunities available to participate in our decision-making processes, with 12% telling us they were dissatisfied.
- 51% of our customers told us in the year that they were satisfied that ateb gave them a say in how services are managed, with 17% telling us they were dissatisfied.
- 68% of our customers told us they were satisfied that ateb listened to their views and acted upon them, with 11% telling us they were dissatisfied.

Key areas we are planning to work on to improve:

We commissioned TPAS Cymru during 22/23 to provide an independent improvement and advisory audit assessment of our current approach to Customer Engagement to help us understand:

- What we are doing well
- What we need to do to improve

The purpose of the audit was to:

- Provide assurance that we have effective internal controls and practices in place relating to customer engagement.
- TPAS Cymru to act as a critical friend to help improve the delivery of customer engagement.
- Highlight areas of good practice and suggest areas for improvement.

The audit was designed to meet our specific requirements by focussing on current practice against the Welsh Government Regulatory Standards and make recommendations where it was identified that improvement were required. A full copy of the report can be found here ([insert link](#)).

The audit findings overall demonstrated our commitment to Customer Engagement and listening to tenants, which is primarily delivered through the e2i initiative, however the audit made several recommendations that will be a focus of our improvements in this area during 2023/24, including.

- We will develop a simple but distinct Customer Engagement framework or strategy.
- We will examine how to firmly establish ways for contract holders to be involved in ateb staff and contractor recruitment processes.
- We will examine approaches to effectively engage ateb customers in Landlord Health & Safety.



Equality, Diversity & Inclusion

Access all Areas is part of our DNA. We know that to achieve our strategic aim of improving our customer services, serving more people, and increasing our business effectiveness we must be inclusive in everything we do, as diversity of background, experiences, skills, and views enrich our communities, services, and the work that we do. Our Equal Opportunities and Diversity policy outlines our legal equality duties and corporate responsibilities.

We co-produced with Board, the ateb team and customers with the support of Tai Pawb an Equality, Diversity, and Inclusion Delivery Plan that was approved by Board in the latter part of 2022/23. The delivery actions were informed by an improvement and advisory audit of Equality Diversity and Inclusion undertaken by Mazars in July 2022.

The Delivery Plan details how we plan to improve our approach to equality, diversity, and inclusion across ateb Group and the actions we will take to deliver improvements.

We are committed to being inclusive with our:

- Customers and Communities
- People
- Partners

and will embed this throughout our systems and processes.

This includes the commitments we made to:

- Mitigate the impact of Covid-19 on Black, Asian and Minority Ethnic colleagues, and communities.
- Improve the ethnic diversity of Board and colleagues at all levels.
- Communicate and engage.
- Develop and inclusive culture.

When signing the Tai Pawb Deeds Not Words Pledge, we made a commitment to take action to make Wales an anti-racist nation by adopting an anti-racist approach, by looking at the ways that anti-racism is built into our policies, formal and informal rules, and regulations, and generally the ways in which we work.

Our customers', people and partners' voices have been listened to in the development of the plan and we are accountable to them in our delivery. The plan will be launched in early 2023/24. A delivery group will be established to oversee the delivery of the actions, chaired by a member of the ateb Group Board and made up of customers and ateb team members.

This delivery plan complements our Strategic Plan objectives and Directorate Improvement Plans that will be delivered over the next 3 years.

During 2022/23 we:

- Developed and rolled out a Hate Crime Policy.
- Delivered Equality, Diversity, and Inclusion training to the ateb team and Board.
- We developed a relationship map of all partners who can deliver support to Black Asian and Minority Ethnic people in our local communities.

Our purpose states that...

“We will be inclusive in everything we do as diversity of background, experiences, skills, and views enrich our work and services. We know we will need help, so we will listen to your views and act upon them.”

Resident and Tenant Associations

We provided financial and practical support to 9 resident and tenant associations, with the aim of empowering ateb communities and promoting community cohesion and inclusion.

Renting Homes Wales Act (RHWA)

ateb engaged with customers throughout the implementation of RHWA, seeking views at Customer Forum on policy and process changes, communicating regularly with customers on what the changes would mean to our customers, and facilitating “roadshow” events across Pembrokeshire to enable our customers to “drop in” and raise any questions or concerns.

The engagement activities enabled RHWA to be implemented smoothly with changes understood by customers, particularly the rights of customers under the new occupation contracts.

Customer forum

The Customer Forum met monthly during 2022/23 (with a break for Summer and Christmas), meeting on the same day as ateb Board.

We saw a significant increase in the number of customers attending compared to previous years. Customer Forum activities during the year included.

- Reviewing ateb policies in advance of Board approval.
- Reviewing ateb proposed rent increase in advance of Board approval.
- Reviewing and commenting on items for approval and discussion at ateb Board meetings.

Representatives from Customer Forum have sat on recruitment panels for the ateb team and Board members during the year.

Engage 2 Improve

The engage 2 improve (e2i) initiative aims to understand and identify customer driven improvement actions. The e2i group consisting of customers and ateb team members leads on the setting, understanding, analysis and action planning of improvement activity.

During 2022/23 the e2i group agreed and undertook 4 themed surveys.

- Does ateb listen to you?
- Customer engagement.
- Maintenance – specifically external contractors
- Cleaning

A total of 842 responses were received and 9 operational improvement actions identified, including.

- Promote (remind) ateb Contractor Code of Conduct responsibilities to contractors.
- Improvement approach to regular contract meetings using meeting templates and recording / taking minutes.

9 improvement actions from previous surveys were implemented.

Customer support and training

We support customers to develop new skills and understanding to further help us improve what we do. We actively support customers to engage with Tai Pawb and TPAS and feedback what they have learned into ateb's improvement and engagement activities, with several ateb customers attending events during the year



Customer Conferences

We hold a customer conference annually attended by both customers and members of the ateb team to explore how ateb has been performing in the previous 12 months and the priority areas customers would like to see improved. The feedback from the conferences informs our long-term planning and strategic improvement actions for future years. 56 customers attended the conferences that informed our strategic plan actions for 2023/24. Customers identified the need to prioritise improvements to our repairs service and how we communicate with them. The following improvement actions were added to our strategic plan.

- Review customer communication channels for the right tone of voice, timeliness of messaging and platform mixes used to communicate.
- Systems Improvement Project – Reactive Repairs | An Association wide sponsored improvement project aimed at creating the right process supported by the right resources, delivered by the right skills and experiences.

In October 2022 we held a special one-off themed conference in response to what customers were telling us about the impact to them of the rising cost-of-living. The conference involved customers and members of the ateb team. The purpose of the conference was to.

- Share examples of best practice of support offered by others.
- Explore how ateb could ensure rents and service charges remain affordable in 2023/24 – and if our customers felt the ateb Affordable Rent Setting policy goes far enough in ensuring that rents and service charges are affordable for customers.
- Explore with customers and team members what ateb can do in response to support its customers with the rising costs of living.

Customers and team members co-produced ideas and solutions that would ensure ateb was doing all it could to support its customers during this period of economic uncertainty. A Cost of Living and Fuel Poverty plan was developed from the ideas that were put forward at the event.

ateb published an end of year evaluation of how we did in delivering on the cost-of-living ideas and solutions identified by customers that can be read here: www.atebgroup.co.uk/wp-content/uploads/2023/04/Cost-of-Living-and-Fuel-Poverty-Update-March-2023-Update.pdf



Community Days / Events

389 customers attended community days and events during 2022/23. Meet Your Neighbour events and community activity days were held to empower ateb customers to take greater ownership of their communities and to promote community cohesion. They were also a great opportunity for ateb team members to listen to how our communities could be improved.

Summary

Based on our assessment we believe that customers are actively engaged and empowered, however there is always more that we can do. The Customer Engagement and Equality Diversity and Inclusion Improvement and Advisory audits undertaken during 2022/23 will provide a great platform from which to further improve.





■ RS4 – FY 23/24 EVALUATION CHECK

“Tenant empowered approach”

We have made the following evaluation:

Our Board has reviewed our analysis and evidence and consider we are compliant with this performance standard.

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

- Concluded that it meets this standard. Our customer expectation states that we ‘must deliver the right customer outcomes, as effectively as we can’ which can only be achieved with the engagement of our customers. Using our values of trust; togetherness and empowerment we designed and have been using a tenant involvement strategy called Engage. On our website you will see how Engage (if it matters to you, it matters to us) works and details of what they have achieved, how tenants got involved and what they have improved.

2. What was the principal evidence used to evaluate this standard?

The Board has:

Considered the following key evidence for this standard:

- ateb Vision
- #1 Purpose
- #4 Deliver
- Customer satisfaction feedback
- Customer satisfaction feedback
- Bi-annual customer feedback reports
- Equality, Diversity, and Inclusion Annual Report
- TPAS Improvement and Advisory Audit
- ED&I Improvement and Advisory Audit

Evaluation Check

3. Is there Improvement planning in place?

The Board has:

Included the following improvement actions for FY 23/24 in our Improvement Plan:

- IP/010 - We will develop a relationship map of all key stakeholders who can support the delivery of our Community Development improvements. (Customer)
- IP/011 - We will develop a relationship map of all key stakeholders who can support Black Asian and Minority Ethnic customers. (Customer)
- IP/012 - We will work with community partners to further enhance our “welfare service” offer. (Customer)
- IP/013 - We will actively engage with other statutory and third sector organisations to promote the health and wellbeing of our customers at events and through social media. (Customer)
- IP/021 - We will review how Tenant and Resident Associations (TARA) are constituted and supported by ateb practically and financially. (Customer)
- IP/022 - We will explore the creation of an “ateb trust” to fund community initiatives. (Customer)
- NEW - Review customer communication interfaces for the right tone of voice, timeliness of messaging and platform mixes used to communicate. (Customer) (RS4)



■ RS5

Rents and service charges are affordable for current and future contract holders.

Affordable Rent Policy

The Board adopted its Affordable Rent Policy in FY 2019/20. The policy is reviewed and updated each year by customers and the Board and used to set the following year's rent. The purpose of the policy is to keep rents at a level that is affordable for our customers.

Service Charge Procedure

It is intended that service charges will be set at levels that are affordable and in line with the Affordable Rent Setting Policy.

Customer Rent Setting Engagement

Customers were initially consulted on the Affordable Rent Setting policy in late 2019 at the Customer Big Event and were generally supportive of the approach taken to assessing affordability and rent setting on an annual basis.

With the timing changes to rent increase notifications introduced with RWA and the inflation trigger of

3% being breached, we had to adapt this year's rent consultation process accordingly. We:

1. Held a 'cost of living crisis' conference with customers.
2. Undertook an affordable rent survey.
3. Commissioned a report to assess rent levels for our extra care and older person schemes.

The information gathered through these engagement activities was in addition to the more general affordability questions asked through our last STAR survey which concluded that our customers considered us to be in the top 10 (out of 46) for value for money on rent and service charges.

- 96% were either 'very/satisfied' or 'neither satisfied nor dissatisfied' with our rents value for money.
- 91% were either 'very/satisfied' or neither 'satisfied nor dissatisfied' with our service charges value for money.

From the customer engagement activities, we undertook, it was clear that the link between Housing Benefit and, to a lesser extent Universal Credit (UC), was key to customers being able to afford any rent increase ateb imposed i.e. where benefits/ UC increases did not cover a rent increase then the customer would be proportionally disadvantaged. The November 2022 UK government fiscal statement subsequently confirmed that benefits would track inflation as of September 2022 (10.1%).

On reviewing the way our customers pay their rent we were able to determine that.

- 35% - Housing Benefit (partial or full)
- 35% - Universal Credit
- 30% - Self Payer

Therefore 70% of our customers were shielded, partially or in full, from the proposed rent increase of 6.5%.

The customer survey on proposed rent increases that we undertook in October/November 2022 informed us of the following (based on 823 responses to an untargeted email survey):

- 48% would struggle in some way to afford a 7% rent increase.
- 33% would struggle with a 5% increase.
- 17% would struggle with a 3% increase.

The cost-of-living crisis conference we held produced a range of proposals to support our customers with the rising cost of living.

The Erosh commissioned report looking at rents and service charges in our Independent Living schemes demonstrated that broadly speaking our rents were competitively priced in the marketplace.

It was determined that no increase in rents and service charges, unless matched by corresponding benefits or other income, would have been welcomed by customers.

From the feedback received at the customer conference there was a recognition that ateb does have increasing costs that will impact on the business' ability to maintain services over the long term. It was also evident that there was a need to make sure that with any rent increase, there is support for those customers experiencing the most difficulty in the current cost of living crisis and ateb Board subsequently approved a Financial Assistance Fund to support those in greatest financial hardship during 2023/24.



Affordable Rents Assessment

Our 2023/24 social rents for general needs properties compared favourably to the Living Rent as determined by our Affordable Rent Setting policy.

Property Type (General Needs)	ateb Social Rents 2023/24 (average)	Living Rent 2023/24	Local Housing Allowance 2032/24
Bedsit	£65.65	£92.37	£60.00
1 Bed Flat	£88.10	£102.63	£78.25
1 Bed House / Bungalow	£93.90	£102.63	£78.25
2 Bed Flat	£94.25	£133.42	£98.96
2 Bed House / Bungalow	£106.22	£133.42	£98.96
3 Bed House / Bungalow	£119.74	£164.21	£120.82
4 Bed House / Bungalow	£142.61	£195.00	£143.84
5 Bed House / Bungalow	£151.84	£225.79	£143.84

We believe we have taken positive action in terms of keeping our rents affordable. Over the last 4 years we have applied the following rent increases:

Rent Group	20/21	21/22	22/23	23/24
Social rents	1.7%	0.5%	3.1%	6.5%
Intermediate rents	0%	0%	3.1%	6.5%
Welsh Government Max. %	2.7%	1.5%	3.1%	6.5%

In years 20/21 and 21/22 we increased our rents by less than that allowed by Welsh Government in recognition of the challenges faced by customers during the pandemic, during the same period intermediate rents were frozen. In 2022/23 and 2023/24 we have increased our rents by the maximum allowed, however introduced an energy hardship fund in 2022/23 and a Financial Assistance Fund in 2023/24 to support those customers most in need and struggling to pay their rent.

Summary

We believe our approach to rent setting offers an affordable solution to our existing and future customers.



■ RS5 – FY 23/24 EVALUATION CHECK

**“Rents and service charges
are affordable for current
and future tenants”**

We have made the following evaluation:

Our Board has reviewed our analysis and evidence and consider we are compliant with this performance standard.

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

- Agreed an Affordable Rent Setting Policy with the principle of setting rents that are affordable for our customers and complies with all the applicable rules and statutory guidance. All our social rents are set in accordance with the Welsh Government Rent Setting Policy.

As part of our policy commitment to set affordable rents, we annually consider and consult on affordability with our customers. The rent setting processes also assess the business need to invest in properties, services, and development, to further our purpose of creating better living solutions for the people and communities of West Wales.

Each year we assess our rent for the forthcoming year in line with our policy principles and statutory guidance, consult with customers and seek approval for the same from our ateb Board of Management.

2. What was the principal evidence used to evaluate this standard?

The Board has:

- Considered the following key evidence for this standard:
 - ateb Vision
 - #4 Deliver
 - #4 Assure
 - Affordable Rent Setting policy
 - Affordability analysis
 - Customer feedback on rent setting consultation
 - Performance reports
 - WG Tenant satisfaction survey results
 - WG affordability return
 - Income Collection Policy

3. Is there Improvement planning in place?

The Board has:

Included the following improvement actions for FY 23/24 in our Improvement Plan:

- We will review our Affordable Rent Setting policy annually to ensure rents and charges continue to be affordable for our customers. (Customer).

■ RS9

The organisation provides high quality accommodation

Affordable Rents Assessment

Our 2023/24 social rents for general needs properties compared favourably to the Living Rent as determined by our Affordable Rent Setting policy.

Home type	Numbers
Social Rent	2183
Intermediate Rent	558
Supported Living	46
Sheltered / Semi Sheltered	235
Shared Ownership	12
Rent 2 Own	5
Extra Care	88
Total	3127



Welsh Housing Quality Standards (WHQS)

Social Housing stock compliance with the WHQS by component as of 31st March 2023:

Component	% Fully compliant	% Compliant with acceptable fails	% Non-compliant
Roof and associated components	100%	0%	0%
Windows	99.5%	0.5%	0%
External doors	99.5%	0.5%	0%
Kitchens	77.1%	22.9%	0%
Bathrooms	75.2%	24.8%	0%
Energy rating SAP 65+	97.9%	2.1%	0%
Central heating system	97.9%	2.1%	0%
Electrical systems	100%	0%	0%
Mains powered smoke detectors	100%	0%	0%
Gardens and external storage	88.4%	11.6%	0%

We deliver maintenance programmes to ensure that WHQS is maintained.

Energy rating

Our homes had the following energy rating status at the end of March 2023 (excludes Shared Ownership and Rent 2 Own homes):

SAP Rating	Number of Homes	%	% Non-compliant
A	199	6.3%	0%
B	1,004	31.9%	0%
C	1,544	49.1%	0%
D	329	10.5%	0%
E	0	0%	0%
F	27	0.9%	0%
G	7	0.2%	0%

New Build Programme

We have the following proposals for new property growth over the next 5 years (subject to business planning assumptions being met):

New Units - Cumulative	23/24	24/25	25/26	26/27	27/28
ateb	86	128	131	64	14
MBH	16	17	26	29	28

All our new build properties will be built in accordance with Welsh Government standards and requirements where we are receiving Social Housing Grant (SHG). All non SHG properties will be built to Building Regulation standards as a minimum with aspirations to provide higher standards than competitor housing developers.

Damp and Mould

The tragic death of two-year-old Awaab Ishak, who died from a respiratory condition caused by exposure to mould in a housing association home, raised the profile across the sector of how housing associations deal with customer concerns regarding damp and mould issues in their home.

Following the publication of this tragic case, ateb raised the profile of damp and mould, and undertook the following actions:

- A review of our processes on how we handle reports of damp and mould from customers, at first point of contact.
- A review of customer information on our web site relating to damp and mould.
- A review of our procedures relating to tenant and landlord responsibilities
- A review of our approach to inspecting properties where we receive a report of damp and mould.
- A review of all current cases of damp and mould reported by customers and/or ateb team members.
- A desk top assessment of all properties with known historical damp and mould issues, and where we have no current reports from customers.

We identified several higher risk properties that require ongoing attention and potentially higher-level asset decision making. We found that general cases were relatively low, however we needed to be mindful of customers suffering in silence.

We identified areas where we could do more, and consequently developed a plan of improvement actions for the short to medium term to further assure ourselves, customers and Board that all systems, processes and policies were fit for purpose in relation to damp and mould.

The improvements we made included.

- A review of our current processes and procedures for responding to damp and mould issues.
- The development of a specific policy to address damp and mould that covered each area where ateb may be required to act, including any proactive interventions, our approach to diagnosis, actions we consider appropriate in different circumstances, effective communication and aftercare.
- With customers, we reviewed the current information, materials and support provided to customers.

Optimised Retrofit Program (ORP)

In the latter part of 2022/23, we secured £930k in funding from Welsh Government under the Optimised Retrofit Program. 44 homes will benefit from external wall installation during 2023/24, improving the energy efficiency of these homes, with plans well developed for a further 72 homes in 2024/25 and 2025/26 subject to Welsh Government funding being available.

Fire Safety Capital Grant

ateb secured in the region of £6m Welsh Government Fire Safety Capital Grant towards the end of 2022/23 to address fire safety concerns at our 2 Extra Care schemes. Works will commence in early 2023/24 to improve evacuation systems and internal / external compartmentation issues, and the programme of works is anticipated to take 2 years.

Transitional Accommodation Capital Programme (TACP)

We were able to secure in the region of £130k Welsh Government TACP funding during 2022/23 to bring a much-needed home back into use that did not meet the required standards and was being considered for disposal.

High Quality Homes Assessment

The feedback from our customers regarding their satisfaction with their home is positive. The following shows a breakdown of 1032 responses to the Welsh Government tenant satisfaction survey undertaken in February 2022:

How satisfied or dissatisfied are you with the overall quality of your home?

Response	Number	%
Very satisfied	563	55%
Fairly satisfied	332	32%
Neither	66	6%
Fairly dissatisfied	58	6%
Very dissatisfied	13	1%
Total	1032	

The response rate represents 34% of our total homes.

We have continued to see high levels of customer satisfaction with the quality of their home during 2022/23.

When we have asked customers how satisfied they were with the quality of their home when we completed stock condition surveys, 94% told us they were either very or fairly satisfied with the quality of their home.

100% of customers who responded who moved into an ateb home during 2022/23 told us they were satisfied with their home and the community it was situated in 4 weeks after moving into their home.

We have long term investment plans to ensure our homes continue to meet the required quality standards, including as follows over the next 30 years:

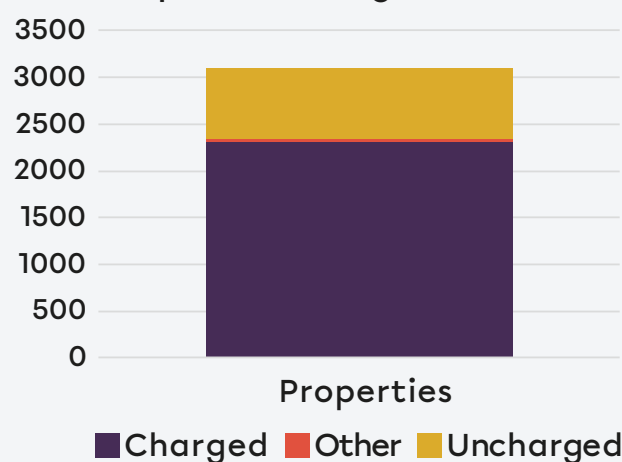
- £42.2m - Heating Systems
- £23.9m - Bathrooms
- £44.8m - Kitchens
- £18.8m - Electrical works
- £7.1m - Roofs
- £27.4m - External Doors and windows
- £5.4m - Solar Panels

A total investment of £170m is currently planned for, over the next 30 years.

2,313 properties are charged as security against our debt portfolio. These properties undergo a rigorous independent valuation assessment before deeming the homes suitable for lender collateral.

There are over 800 properties available for charging.

Properties charged to lenders



Summary

The quality of homes is key to our Vision of creating better living solutions for the people and communities we serve. However we understand there is always more we can do, and customer expectations will change over time.

We have current and future investment plans to maintain our homes to the standards expected from our customers and regulatory requirements.



■ RS9 – FY 22/23 EVALUATION CHECK

**“The organisation provides
high quality accommodation”**

We have made the following evaluation:

Our Board has reviewed our analysis and evidence and consider we are compliant with this performance standard.

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

- Concluded ateb meets this standard. Our purpose is to ‘Create better living solutions for the people and communities of West Wales’. The heart of what we do is providing high quality homes for our customers and in doing so we ensure we comply with all necessary legislation and standards to make sure our homes are safe, comfortable, and meet the needs of our customers.

2. What was the principal evidence used to evaluate this standard?

The Board has:

Considered the following key evidence for this standard:

- ateb Vision
- #1 Purpose
- #4 Deliver
- #5 Assure
- Monthly Performance reports
- Stock condition surveys and reporting
- Securitisation survey & valuation
- Customer satisfaction feedback
- Damp and Mould Policy
- WHQS Policy
- WHQS Survey and certification data
- Repairs and Maintenance Policy
- SAM Improvement strategy
- Damp and Mould Improvement Plan
- Damp and Mould Board Reports



3. Is there Improvement planning in place?

The Board has:

Included the following improvements actions into our Improvement Plan for FY 23/24:

- IP/002 – Plan B – Help with our customers’ energy bills by lowering carbon in existing homes. We will increase our knowledge of our homes’ environmental footprint to allow informed investment decisions to be made, including WHQS 23 consultation feedback. (Customer) (RS3)
- IP/007 - We will review ateb policies to ensure full compliance with the Building Safety Act. (Customer) (RS9)
- IP/009 - Develop our strategic asset management capabilities including reviewing and understanding the implications of WHQS 23 on ateb’s Business Plan. (Customer) (RS9)
- NEW - Systems Improvement Project – Reactive Repairs | An Association wide sponsored improvement project aimed at creating the right processes supported by the right resources, delivered by the right skills and experiences. (Customer) (RS9)



Performance Self Evaluation Summary FY 22/23

The teams have had to put a lot of effort into getting things done for our customers over the last year, thanks to them, our partners and to our customers who have been very understanding. Performance in key areas of ateb delivery such as repairs and lettings have seen some backward movement, repairs due to resourcing and contractor availability, and lettings partly due to changes in processes prompted by the Renting Homes Wales Act. Both ateb and MBH saw their development contracts extended due to the supply chain problems all contractors have experienced over the last year. This meant handovers were down but positively, we received a significant increase in SHG in the year highlighting the active build programmes we still have.

ateb did see a rise in Anti-Social Behaviour cases and a drop in satisfaction with outcomes agreed, clearly this is a difficult area to measure given the nature of the service need. In compliance work we performed well with new areas being introduced in the year such as a separate damp & mould register. Customer engagement continued to prioritise improvement actions based on customer feedback and our shared spaces services delivered all the required inspections and checks needed across our communal areas.

You will see in the report, references to significant investment in decarbonisation works (called Optimised Retrofit Programme, ORP for short), fire safety and transitional capital works. We thank the Welsh Government for supporting all these programmes which will have a positive impact to customers wellbeing.

West Wales Care & Repair beat their own targets in a year where our older and vulnerable communities really needed our support more than ever.

Additional grant towards the end of the year allowed us to do that bit more, and help keep more people independent in their homes. Mill Bay Homes returned circa £1.4m in gift aid and received some great testimonials on their latest homes, all of which can be seen on the newly branded website.

Thank you for the considerable effort that has gone into keeping our performance moving over the last year, we look forward to a more stable next year.

Nick Hampshire
Chief Executive



Creating
better
Living Solutions