

Self Evaluation

2017-2018



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Introduction

At Tai Calon, we are keen to improve our services and the support that we provide to our tenants. Evaluating ourselves is an essential part of this process.

This self evaluation has been carefully carried out with the aim of identifying how we can improve our services in all areas of the business. It is vitally important to ensure that the all Tai Calon's work is targeted at our vision of providing homes and thriving neighbourhoods where people are proud to live. It is also important to ensure that our services are delivered in line with our values of:

- Focusing on tenants and communities
- Working honestly and transparently
- Showing respect and professionalism
- Being excellent
- Improving and innovating
- Involving, listening and learning

There is evidence available to demonstrate that Tai Calon is working well and that our services are

continuing to improve. However, we are on a journey and recognise that there is still room for improvement in the delivery of our services. We are ambitious and determined to become an excellent and well respected organisation. The areas in which we need to improve have been identified. We are working on these, while continuing to drive forward efficiencies throughout the business.

We welcome your feedback on our self evaluation. Please let us know your views on where we can improve and help us provide a better service for tenants.



Dr. Norma Barry
Chair of the Board

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What is self evaluation?



Self evaluation is the framework we and other housing associations use to review our performance. There are ten Performance Standards set by the Welsh Government that cover all of Tai Calon's activities.

The following pages outline the process we followed, and the conclusions reached and include the views of tenants and staff and link to the organisation's business plan and priorities.

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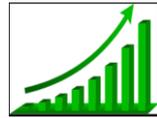
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How did we do it?



Step 1 – We reviewed the information provided by Welsh Government to ensure that our process was robust



Step 2 - We collected lots of the data e.g. our STAR tenant satisfaction survey, the staff survey, Housemark benchmarking and our own performance data



Step 3 – Our Executive Team and the Tenant Quality Forum provided their input



Step 4 – Then, the Board reviewed everything and came to their conclusions.

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Performance Standard 1: **Effective Board and executive management with a clear and ambitious vision for Tai Calon**

What this means:

- Tai Calon's leadership sets a clear vision and values for the organisation.
- Governance arrangements establish and maintain clear roles, for the Board, Chair and Chief Executive.
- Tai Calon has an appropriate code of governance.
- Tai Calon obeys all relevant law.

How do we know?

- ➕ There were large improvements in tenant satisfaction between 2016 and 2017. The STAR survey showed that overall satisfaction improved by 13% to 77% and tenant satisfaction with the overall quality of their home improved by 4% to 75%.
- ➕ The staff satisfaction survey also showed large improvements. There was a 12% rise in satisfaction that there is clear leadership in the organisation and a 16% rise in satisfaction that leaders are visible in the organisation.
- ➖ Despite these positive trends there is still room for improvement and we will track progress by benchmarking ourselves to similar organisations.

What is our assessment?

We recognise that there have been improvements in both leadership and governance over the last year, and that this improvement was reflected in the higher scores on both the staff and tenant satisfaction surveys.

We also consider that we can improve tenant satisfaction scores as these are still lower than other associations despite the improvement. We are confident that we have the leadership team in Tai Calon to deliver this improvement.

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Performance Standard 2: **Effective and appropriate tenant involvement and high quality and improving services**

What this means:

- Tai Calon can demonstrate how tenants are effectively involved in strategic decision making and shaping services in ways appropriate for tenants and the organisation.
- Tai Calon can demonstrate how we assure ourselves of current service performance, including tenant satisfaction, and drive continuous improvement.
- Tai Calon ensures that all homes meet required standards of design and quality.
- Tai Calon meets all applicable statutory requirements providing for the health and safety of the occupants in the home.

How do we know?

- ➕ The STAR survey and our own surveys allow us to monitor tenant satisfaction. 79% of respondents to the STAR survey were satisfied with their neighbourhood and 75% happy that they were kept informed.
- ➕ Satisfaction with our Customer Services team was 100% in the last three months of 2017/18
- ➕ The number of upheld complaints fell from 136 in 2016/17 to 35 in 2017/18.
- ➖ There are still areas that we need to improve on. The STAR survey showed that 62% of respondents felt their views were listened to and acted upon.
- ➖ We asked the Tenant Quality Forum about this directly. They felt that we needed to get better at communication and that some of our neighbourhoods needed to be improved.
- ➖ There is more we can do in 2018 to implement flexible ways for tenants to become involved and to widen the number and diversity of involved tenants.

What is our assessment?

We felt that this was an area where work was in progress. Whilst there is an improvement in reducing complaints more needs to be done this year to widen tenant engagement and improve tenant satisfaction.

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Performance Standard 3: **Comprehensive assessment of the business impacts of current and emerging risks, including new business and development opportunities, with robust risk management arrangements.**

What this means:

- Tai Calon safeguards taxpayers' interests and the reputation of the sector and protects social housing assets.
- Tai Calon's assessment of capacity to take on new business and development opportunities is robust.
- Tai Calon carries out detailed and robust stress testing of financial plans against a range of scenarios, identifying appropriate mitigation strategies.
- Before taking on any new liabilities, Tai Calon ensures obligations are fully understood and demonstrates consideration of how the likely impact on current and future business and regulatory compliance will be managed.

How do we know?

- ➕ We have put a lot of work into risk management over the last two years. Operational and sector risks are considered throughout the year, and for each risk we consider mitigations should the risks materialise.
- ➕ We also stress test our Business Plan as well as having recovery plans in place.
- ➕ The Board is kept regularly updated. There is a specific committee dedicated to risk, the Audit and Risk Committee. This Committee considers the risk registers and provides direction and guidance.
- ➕ Board sets the risk appetite for Tai Calon.

What is our assessment?

We felt that the current arrangements for managing risk are of a good standard and that risk is considered professionally and effectively by the teams in Tai Calon.

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Performance Standard 4: **Clearly evidenced self evaluation and statement of compliance**

What this means:

- Tai Calon complies with Circular 02/15 - The core principles of self evaluation for use by Housing Associations Registered in Wales, or any subsequent guidance.

How do we know?

- ➕ The self evaluation process we use is thorough, and based on using evidence and tenant feedback to inform our views.
- ➕ Each year we go back to the guidance provided by the Welsh Government and check that our approach is compliant.
- ➕ The Regulator attended our self evaluation session with the Board and felt the approach we used was robust.
- ➖ We can still improve our approach to self evaluation, by making it easier for tenants and Board members to use the information and by linking self evaluation more effectively to our Board assurance framework.

What is our assessment?

We were comfortable that the process Tai Calon uses is effective and allows us to make an evidenced assessment of how well we are working. We will gather more feedback from external stakeholders in next year's assessment.

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Performance Standard 5: **A track record of achieving positive outcomes, responding appropriately to new challenges and performance issues (Part 1– Repairs)**

What this means:

- Tai Calon can demonstrate how the Board assures itself of current performance and drives continuous improvement.
- Tai Calon can demonstrate how lettings make the best use of available housing, compatible with the core purpose of the Registered Social Landlord.

How do we know?

- ➕ The STAR survey asks a question on how satisfied respondents are with the way Tai Calon deals with repairs. In 2017 67% of respondents indicated they were satisfied, a 12% improvement on the 55% recorded in 2016. 94% of respondents were also happy with the attitude of the tradesperson who did the repair.
- ➕ Our own internal performance measures showed that we completed 95% of repairs within their target time in 2017/18.
- ➕ We also completed nearly 95% of these repairs correctly the first time, giving a better service to the tenant and meaning we are more efficient.
- ➖ While there was improvement in satisfaction shown by the STAR survey we consider, when comparing ourselves to others, that we can improve and that our costs for repairs are high.
- ➖ The Tenant Quality Forum felt that we need to improve our contract monitoring.
- ➖ There are too many reactive repairs, and we'd like to move to less repairs and more planned maintenance.

What is our assessment?

We recognise that there has been progress in this area over the last year, but feel that there is still room for significant improvement.

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Performance Standard 5: **A track record of achieving positive outcomes, responding appropriately to new challenges and performance issues (Part 2—Voids – Empty Properties)**

What this means:

- Tai Calon can demonstrate how the Board assures itself of current performance and drives continuous improvement.
- Tai Calon can demonstrate how lettings make the best use of available housing, compatible with the core purpose of the Registered Social Landlord.

How do we know?

- + We achieved a significant reduction in the number of empty properties (voids) through the year. At the start of the year Tai Calon had 188 empty homes. By the end of the year this had reduced to 85.
- + This reduction means that we also reduced the income lost by not receiving rent on these homes, which fell from 3.56% to 3.02%
- + Our satisfaction surveys show that new tenants are happy with the quality of their home. We achieved 100% in Quarter 4 of 2017/18.
- The cost of repairing empty homes is still too high.
- The time that properties are empty is still too long. We need to improve this as it means we are providing homes for people who need them more quickly as well as receiving more rent.

What is our assessment?

We are very pleased that the number of empty properties fell significantly through the year to the lowest level we have ever achieved by the end of March. Our focus this year will be on void turn-around times and reducing the costs of getting each property ready for a new tenant.

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Performance Standard 6: **Delivering value for money in all areas of the business**

What this means:

- Tai Calon demonstrates a strategic approach to, and delivery of value, for money across the business.

How do we know?

- ➕ The STAR survey asked tenants whether they thought that their rent provides value for money. 78% of tenants felt that it did. This was a rise of 5% on the previous year.
- ➕ The Welsh Government collects a set of Value for Money indicators, and they show that our rents are some of the lowest in Wales. Our levels of bad debt and rent arrears are low too.
- ➕ We hold regular events to come up with new ways of delivering better value for money.
- ➖ The Tenant Quality Forum was asked about Value for Money. They were concerned about rent increases and also felt that completing repairs correctly the first time could be improved which would lead to a better tenant experience.
- ➖ In some areas our costs are still too high, and while we are reducing the level of empty homes we have and are repairing them more quickly, we are still losing too much rent while they are empty.

What is our assessment?

We feel that this is an area where Tai Calon has significant capacity to improve its performance.

We have a Value for Money Framework in place and are making progress against it, however we note the comments of the Tenant Quality Forum in respect of completing repairs and recognise that further work is required to make us more efficient.

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Performance Standard 7: **Compliance with regulatory and statutory requirements and guidance**

What this means:

- Tai Calon communicates in a timely manner with the Regulator on material issues that relate to non-compliance.
- Tai Calon adheres to all regulatory requirements.

How do we know?

- ➕ We have a 'Three Lines of Defence' approach to ensuring we are compliant with regulatory and statutory guidance. This uses both internal and external reviews to ensure that the risk of non compliance is minimised.
- ➕ To support this we undertook a peer review across all areas of health and safety compliance which, whilst identifying areas for improvement, confirmed that an effective health and safety system was in place.
- ➕ Following the peer review of Health and Safety we have identified an action plan, which we will monitor, to deliver further assurance.

What is our assessment?

We recognised that the 'Three Lines of Defence' approach provides us with a good level of assurance. We are also pleased that there have been positive internal audits which provide further assurance. We will monitor the Health and Safety Action Plan to ensure that where further assurance is required, it is provided.

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Performance Standards 8 and 9: **A financial plan which delivers and supports the business plan and effective monitoring of financial performance.**

Effective management of treasury operations ensuring sufficient liquidity at all times

What this means:

- Tai Calon ensures that the organisation is financially sound.
- That there are effective systems and controls in place to monitor and accurately report delivery of Tai Calon's plans.
- That Tai Calon monitors, reports on and complies with all covenants.

How do we know?

- + Our rent arrears were below target, with arrears of 1% in 2017/18 compared to a target of 2%.
- + We also collected 100.24% of the rent due, compared to a target of 99%. This fits in with our strategy around Welfare Reform of encouraging tenants to build up a credit balance in anticipation of the challenges of Universal Credit.
- + Benchmarking with other Housing Associations shows that we have some of the lowest levels of arrears in Wales.
- + We have a comprehensive set of management accounts, and a Treasury Dashboard which monitors key indicators of financial health. These include inflation, rent arrears, bad debts and the cost of our own funding.
- We still need to improve due to Universal Credit as it will bring significant challenges to our income when it is fully deployed

What is our assessment?

Although performance is good, we are conscious of the challenges that Universal Credit will bring, and that further improvement will be needed. We recognise the work on Universal Credit that has taken place so far and the plans that are being put in place to mitigate the effects for tenants.

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Performance Standard 10: A clear understanding of liabilities and asset performance

What this means:

- Tai Calon maintains a thorough, accurate and up to date record of assets and liabilities including all liabilities which have recourse to social housing assets.
- Data on the financial and social performance of Tai Calon's assets is accurate and used to inform investment decisions.
- Tai Calon ensures data on the condition of their assets is up to date and is able to demonstrate consideration of the short and long term costs of maintenance, repair and renewal.
- Tai Calon ensures that publicly funded homes meet the standards set out in the Welsh Housing Quality Standard.

How do we know?

- + We have an Asset Management Strategy in place which sets out how we will manage our stock.
- + We also have an Asset Performance Evaluation (APE) tool. This is used as part of decision making when deciding what action to take with our assets. For example, as our homes become empty, the tool is used to decide whether to repair and re-let the property; or whether it would be better to remodel or sell it.
- + The energy efficiency rating of our properties is 70.46, against a target of 65.
- + We have an Assets and Liabilities Register in place.
- We still need to improve further and complete the move to increase planned maintenance and reduce reactive repairs.
- Our stock is challenging, with relatively large numbers of non traditional designs on our homes.
- We will continue to benchmark the cost per property for major works and cyclical maintenance.

What is our assessment?

We recognise that there is still a significant amount to do in this area, and that challenges remain around our housing stock. We felt that Tai Calon had put the right tools and processes in place to address these challenges and that it was capable of the improvements required.

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What next...

These self evaluation outcomes represent the areas that Welsh Government expects Housing Associations to consider when delivering services. We have set out our performance in 2017/18 and where we can improve. The Board of Tai Calon has reached this position having considered the views of tenants and staff.

We recognise that improvements are required and will use the outputs of self evaluation to inform both new and existing activities already in our plans. We will continue to collect the views of staff and tenants so that we can measure improvements in the services we deliver. In addition we will repeat the self evaluation exercise during 2018/19 and publish the results.

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