"JOHNNIE" JOHNSON HOUSING

KPI Year End Report 2009/10

Working together to provide homes and services that people value

YEAR END PERFORMANCE MONITORING REPORT FOR 2009/10

1 Summary

This report is a year end review of the key performance indicators contained within the Performance Plan (2009/10).

2 Recommendation

Members are asked to review and comment on the performance of this years key performance indicators as contained within the Performance Plan.

- To consider and note the presentation
- To review and comment on the year end report on the performance plan for the year 2009/10

3 Background

The Performance Plan sets out the organisation's key performance indicators.
This report is a year end review of progress against the targets in the Performance Plan for 2009/10.

4 Summary of Performance Indicator Performance

Of the 99 indicators contained within the Performance Plan 70 (71%) are currently performing on or above target, 7 (7%) are within acceptable variance from the target, 22 indicators (22%) are currently performing outside the acceptable variance.

Appendix 1 shows JJHT year end performance in comparison to a number of benchmarking groups. As anticipated JJHT is bottom quartile performer for voids, re-let times, % of units vacant, tenancy turnover and staff turnover. However JJHT performs well (top quartile) in many other areas including, arrears, decent homes, SAP ratings, cost of repairs, satisfaction ratings and staff sickness.

5 Progress against the organisations key operational areas

Financial Resources & Expectations

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Previous Month Feb 2010 Value	Previous Year March 2009 Value
FR004 Financial – Borrowings to date as a % of borrowings budgeted.	Borrowings to date as a % of borrowings budgeted.	Percentage	Aim To Minimise		100.00	83.00			March 2010	83.00	105.00
FR005 Financial – Development expenditure as a % of budget.	Development expenditure as a % of budget.	Percentage	Goldilocks		83.00	39.00			March 2010	37.00	71.00

Borrowings

Borrowings throughout the year were lower than anticipated mainly due to delayed development spend. The treasury position at the end of March included funds on deposit of £9.5m which reflected grant receipts in March of £3.5m.

Development expenditure

Expenditure was budgeted to be £13m for the financial year, with budgeted grants and capital receipts of £7.5m providing a net annual budgeted expenditure of £5.5m. The outturn is a net receipt of £0.8m comprising of spend of £5.1m, grant receipts of £4.3m and sales income of £1.6m.

Sales income of £1.6m has been received relating to 8 property sales at The Citadel, 14 sales at Almond Place, 6 sales at Manston Lodge, 1 sale at Dartmouth Street and 2 sales at Bromley Park.

Customers Service

Complaints

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Feb 2010 Value	March 2009 Value
CS001 Complaints Acknowledged - 3 days	% of complaints acknowledged within 3 days (taken by call centre)	Percentage	Aim To Maximise		90	95.2			March 2010	93.47	88.46
CS002 Complaints Response - 15 days	Complaints response within 15 days	Number	Aim To Maximise		85	92.4			March 2010	91.3	75.96

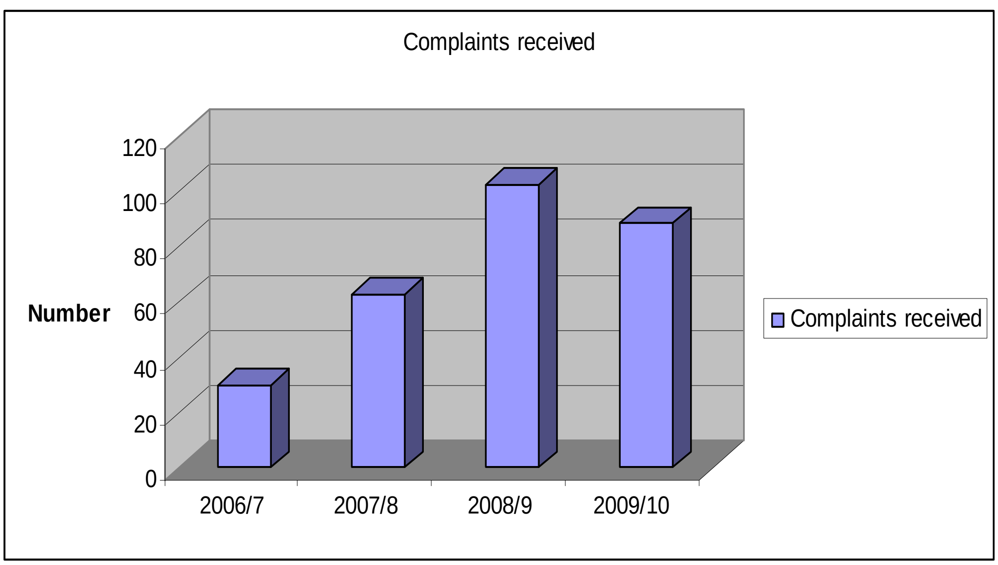
In 2009/10 we received 93 complaints compared to 102 in the previous year.

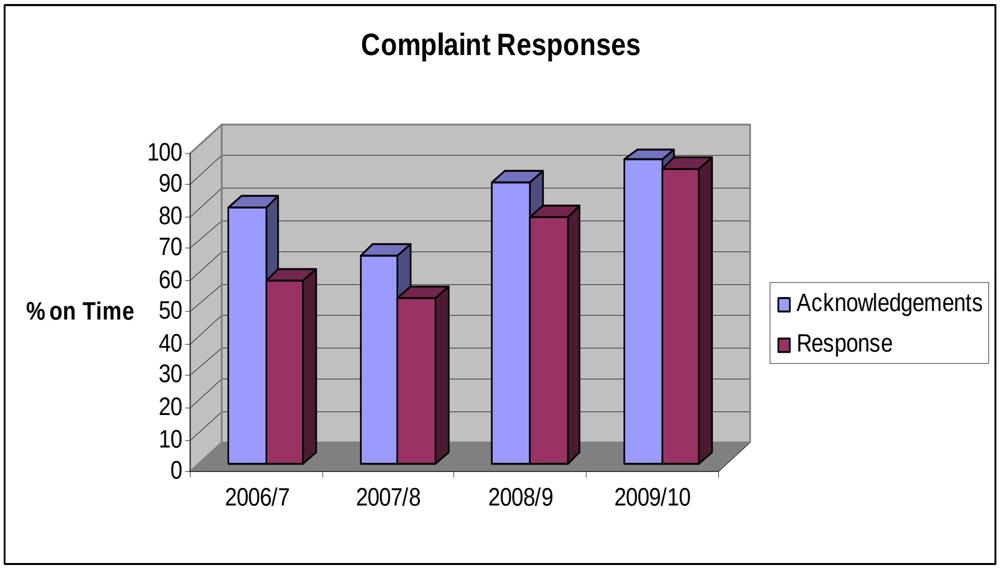
Over the last 4 years, there has been a significant increase in complaints received. This was largely due to the work carried out in raising awareness of the new policy amongst residents, staff training and improved recording systems.

A decrease in complaints this year is probably not surprising given the context of last year's increase.

This year we consolidated the work carried out last year and have performed improved performance in meeting complaints service standards:

- **95.2%** of complaints were acknowledged on time compared to 88% in 2008/9;
- **92.4%** of complaint responses were sent on time compared to 77% in 2008/9.





Complaint trends

The schedule below summarises the type of complaints received over the past year and compared to previous years.

Complaint type	2006/7	2007/8	2008/9	2009/10
	No	No	No	
Astraline	6	4	3	2
Consultation	1	3	1	1
Customer service	0	4	2	4
Day to Day repairs	2	7	24	26
Landscaping	2	0	4	4
Lettings	0	5	3	2
Major repairs	5	6	7	8
Miscellaneous	2	7	10	9
Neighbour nuisance	7	9	26	16
Rents/ Service charges	0	5	9	4
Sales	0	0	1	0
Security	0	2	2	0
Support services	0	0	4	8
Tenancy management	5	11	6	9
	30	**63**	**102**	**93**

The main trends over this period are:

- An increase in complaints regarding day to day repairs – as awareness of the complaints policy and recording of complaints has improved, this service area is always likely to feature highly. In relation to the high volume of repairs the number of complaints are low and in most cases complaints are dealt quickly and raised in contractor partnering meetings where appropriate;
- A small increase in the number of complaints following major repairs. However, given the large increase in the programme few complaints have arisen;

- An increase in the number of complaints recorded as Miscellaneous. These tend to be complaints relating to one-off issues not covered under other complaint types, or complaints concerning multiple issues. A more detailed scrutiny of these in 2009/10 shows that the nature of these complaints is extremely varied and no particular trend is discernible;
- The number of support service complaints has increased this year, however, again these were varied in nature with no clear pattern emerging.
- A reduction in the number of complaints regarding anti-social behaviour (however, there are some recording issues to be resolved as not all complaints recorded are strictly about the service in dealing with ASB);
- A reduction in Astraline related complaints

.

The complaints database also records some resident profile details to ensure there is fair access to the complaints service.

This year 6.25% of complaints from individual residents were of BME origin (compared to 5.5% BME across all JJHT residents); furthermore 25% of complaints were recorded as from tenants who have a disability (compared to 24.3% of disabled residents across the customer profile overall). Therefore, access to the service seems broadly in line with profiling expectations.

Customer feedback

All complainants are sent a questionnaire after the complaint is closed. However, the response tends to be low. This year we received 13 responses. Of these:

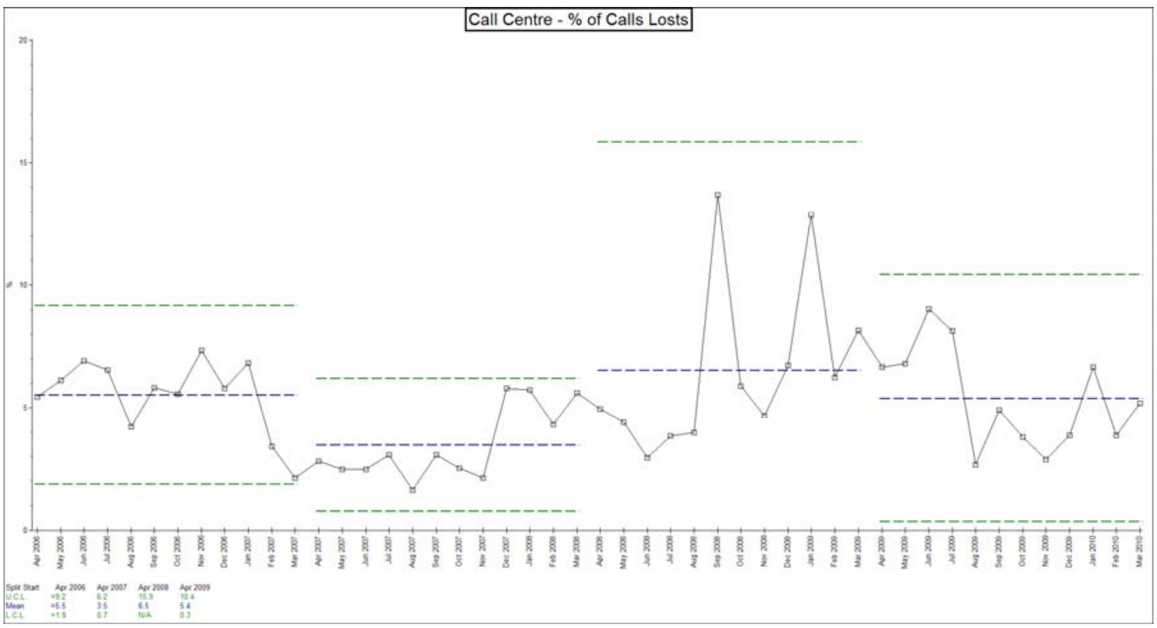
- 8 residents stated they were satisfied or very satisfied with the complaints service, whereas
- 2 were neither satisfied nor dissatisfied, and
- 3 were dissatisfied or very dissatisfied.

As the response to complaints handling surveys is low, we are looking at different ways to get feedback on how the process is handled – this is referred to in section 8.

Call Centre

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Feb 2010 Value	March 2009 Value
CS013 Call Centre Calls - Lost	% of Call Centre calls lost	Percentage	Aim To Minimise		05.00	05.18			March 2010	03.86	06.53

The Customer Service Team has at times experienced staffing shortages over the past year. It has, however, been able to meet its target for lost calls (average at 5.2% through the year) as the graph below shows.



In addition it has been able to hit its target of 80% of calls within 20 seconds (85.56% in 20 seconds). It is hoped that the introduction of one new full time member of staff and changes in shift patterns will achieve further improvements in performance.

Improved sharing of information between the call centre and teams has also enable call centre staff to greatly improve the amount of information they can give to customers. An example of this can be demonstrated by the Retirement Team now regularly providing Customer Services with a list of void properties. This has allowed the Customer Service staff to be fully aware of difficult to lets and therefore are now actively able to market these to potential customers.

One main change within the department was to start ‘tasking’ on CRM as opposed to just e-mailing housing officers and other members of staff or teams within Johnnie Johnson and Astraline. This places greater emphasis on the individual who receives the task to action and close the task rather than the Customer Services team. This will allow JJHT to track a customer enquiry and determine if service standards are being met.

Changes have also been made over the past year to try and increase security with regards to the information we divulge over the phone. All callers are now asked to provide a password or mothers maiden name should they query a rent account – this is also backed up by checking the tenants date of birth, should they have not created a password. This procedure is working well and has been accepted by everyone calling through.

Looking forward, quality monitoring is to be introduced in the next couple of months to report on the quality of the customer service calls along with speed of answer etc. The customer services page on the intranet is to be improved to advise what is happening within the department and how we are performing. The new lettings module will also be introduced & more accountability will be placed on individuals to respond to tasks.

Leasehold Calls

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Feb 2010 Value	March 2009 Value
CS019 Leasehold Calls - Lost	% of Leasehold Calls Lost	Percentage	Aim To Minimise		08.00	02.97			March 2010	01.86	No data for this range
CS020 Leasehold Calls - 20 seconds	% of Leasehold Calls answered within 20 seconds	Percentage	Aim To Maximise		95.00	93.58			March 2010	91.69	No data for this range
CS021 Leasehold Calls - 60 seconds	% of Leasehold Calls answered within 60 seconds	Percentage	Aim To Maximise		98.00	97.29			March 2010	97.48	No data for this range

Leasehold call centre performance targets have been met for this year. Additional temporary staff have been recruited to cover the new sales programme and have also contributed to improved call handling performance within the team. The additional staffs have brought an improved level of conveyancing and marketing knowledge and expertise to the team which has resulted in improved quality call handling. The following compliment logged on the complaints, compliments and comments database is indicative of the overall improvement in the quality of call handling being delivered for new and re-sales enquiries:

"…..thank you for all your help and patience with the sale of my flat. I found the process stressful at times, which I guess is perfectly normal but I always felt I was able to call you to get things explained which made it feel a lot less pressured. Thanks again and I hope that the new owners have as good a relationship with you as I have had."

The increased temporary capacity within the team has also led to a reduction in the number of 'lost calls' to the leasehold helpline. In 2008 an average of 12.01% of calls to the helpline were lost and this has now reduced to an average of 3.36% for the period from June 2009 to January

2010. The volume of calls received to the Leasehold Helpline increased by 35% from 2008 to 2009 largely as a result of the increased level of marketing activity for the new developments which generated increased sales enquiries.

Internal Processes & Capabilities

Arrears

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Feb 2010 Value	March 2009 Value	Latest Note
PC001 TRUST TOTAL ARREARS	JJHT Total arrears All General Let & RASH	Percentage	Aim To Minimise		3%	3.38%			March 2010	3.23%	3.40%	Current Arrears: £627,340 GAD: £18,545,368

NE Arrears

Current arrears in NE the region have been maintained although levels have varied in a range between £95k & £110K throughout the year (the variation is the result of timing of payments of benefit).

This arrears figure has hardly varied over the last four years (despite significant increases in the debit). Staff know their tenants and work closely with them to deal with debt issues.

During the financial year arrears have not risen significantly despite not being able to take tenants to court. It is estimated that approximately 80% of arrears in the NE region are due to delays in paying benefit. Of the remaining arrears, the majority are paying in accordance with agreements and are being closely monitored. The remaining cases outstanding are being actioned and dealt with as a matter of urgency.

It is estimated the amount added to former tenant's arrears during the year is circa £6K. Former tenant's arrears are viewed as a key element in the income management process along with current arrears and void loss. The loss of circa £6k highlights work we have undertaken to manage arrears. We expect this figure to increase this year when court action is undertaken against current tenancies with significant arrears. The increase in former tenant arrears will of course be offset by the same reduction in current arrears when the tenancy is terminated.

RASH Arrears

Current RASH arrears for March 2010 is 2.1% which equated to £238k. Target for the year was 2.1%. Performance March 08/09 was 2.2%.

This years performance represents a small improvement compared to last year. Localities with the highest arrears include Manchester (£54K) and Stockport (£48K). Scheme managers provide advice and ensure tenants are made aware of any arrears and support available to them.

GL Arrears

The total arrears for the General Let team at year end was £231k (8.09%) which equates to below target of 0.59%. When the team was established the arrears figure was 10.3%. The process of monitoring rent arrears for general let is currently the responsibility of the Rents Team and the appointment of a new income services manager, who has started a review of the processes, should lead to improved performance. The team are confident of reaching our 2010/11 target of 6.8%.

Our inability to take cases to court has had a clear impact in our ability to pursue arrears. Our approach will be to improve on our income maximization drive in line with our financial inclusion policy.

Leasehold Arrears

The slow down in the housing market in 2009 affected the number of re-sales progressing through to completion and as a result, there has been an increase in the arrears for LSE schemes whereby arrears have accumulated during the period between the property coming on the market for sale and a purchaser being found/progressing to completion. All such arrears will be paid off at the point of a future sale completing.

There has also been an increase in shared ownership arrears over the last year which reflects the difficulties being experienced by many people following the credit crunch. There are 3 x cases of arrears which cause particular concern and these are being carefully monitored and a more detailed report is currently being developed considering the implications for JJH should we need to progress to forfeiture of the lease or should the mortgage company progress to re-possession. In general, Housing Managers are taking a more pro-active approach to providing improved debt advice information and signposting to external debt advisors as required in line with the Financial Inclusion Strategy.

Voids & Lettings

The findings of the Best Value made a number of recommendations and as result the following actions have been implemented:

- A much tighter grip and monitoring of voids performance information and management is in place now, which has resulted in greater accountability and scrutiny of performance throughout the process;
- The introduction of more focussed targets and performance information – to differentiate between easier and harder to let properties;
- More challenging targets for letting properties which are not classified as ‘hard-to-let’;
- Some delegation of budgets to promote lettings;
- Maintaining the momentum of focussed marketing and the introduction of marketing plans for scheme which have specific challenges;
- Improving void-related processes, such as re-charges and utility billing;
- Increasing momentum on options appraisals for strategically significant schemes

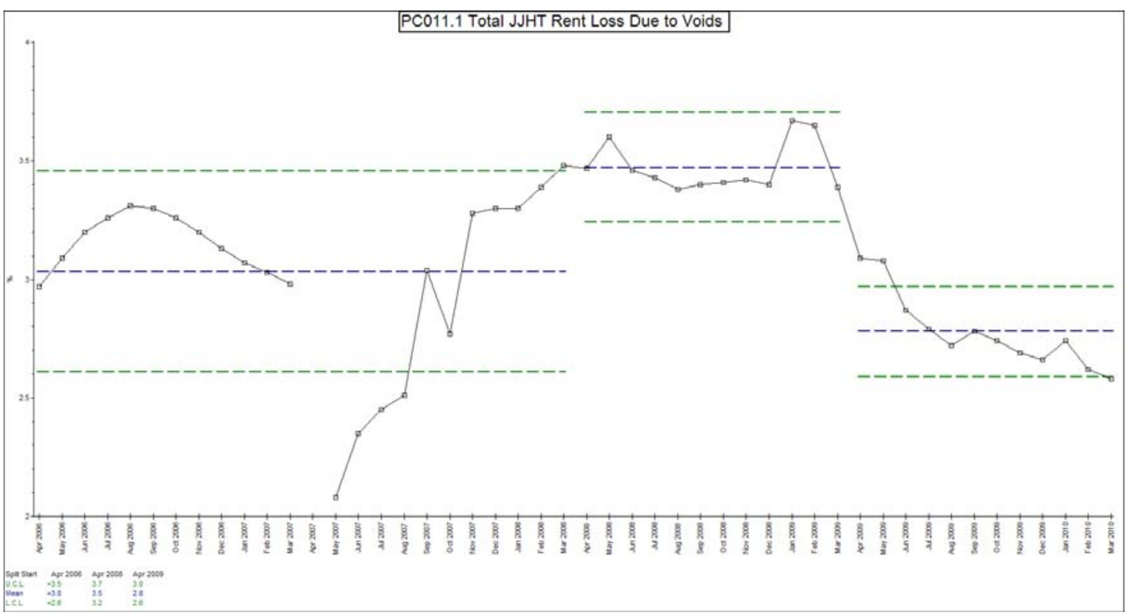
All staff have responded very positively to the outcome of the best Value review and significant efforts have been made to implement the outcomes. As a result of the above action overall performance has improved.

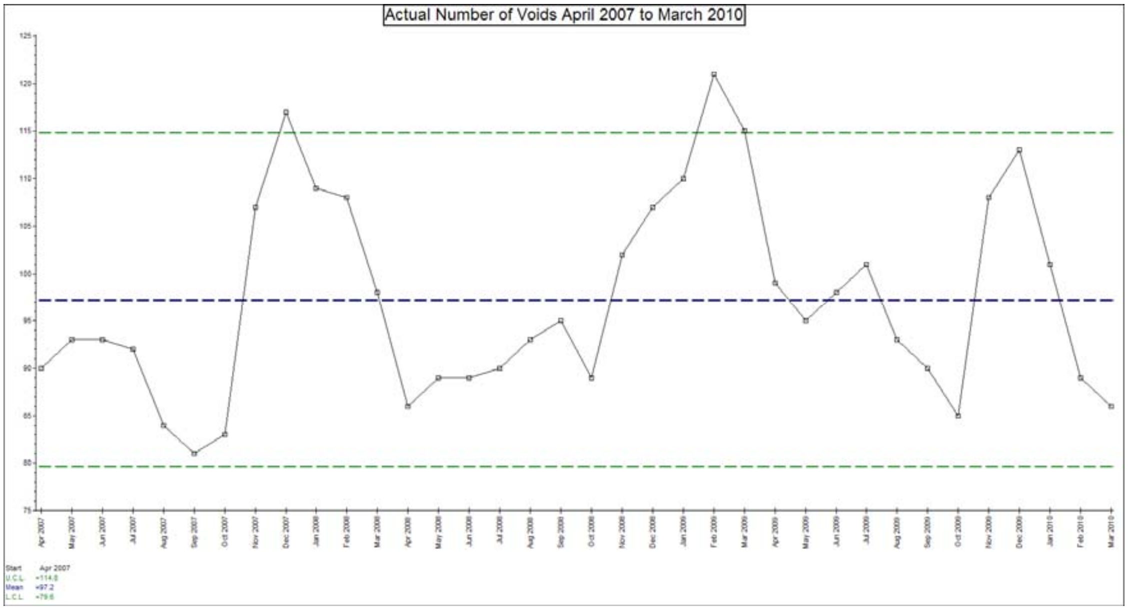
PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Feb 2010 Value	March 2009 Value	Latest Note
PC011.1 Total JJHT Rent Lost Due to Voids	Total JJHT % of Rent Lost due to Void	Percentage	Aim To Minimise		03.20	02.58			March 2010	02.62	03.39	Total Void Loss: £452,975 Total Charges: £17,496,504

Overall void losses are currently reducing month on month (as the graph below shows). For instance, the void loss in April 2009 was (£39,906) and March 2010 void loss (£29,224) is the lowest for several years. This reflects reductions in the number of voids properties. The overall void loss has reduced from 3.39% of the annual rent debit in 2008/9 to 2.54% (2009/10).

The overall void loss for 2009/10 is £452k compared to £570k in 2008/9.

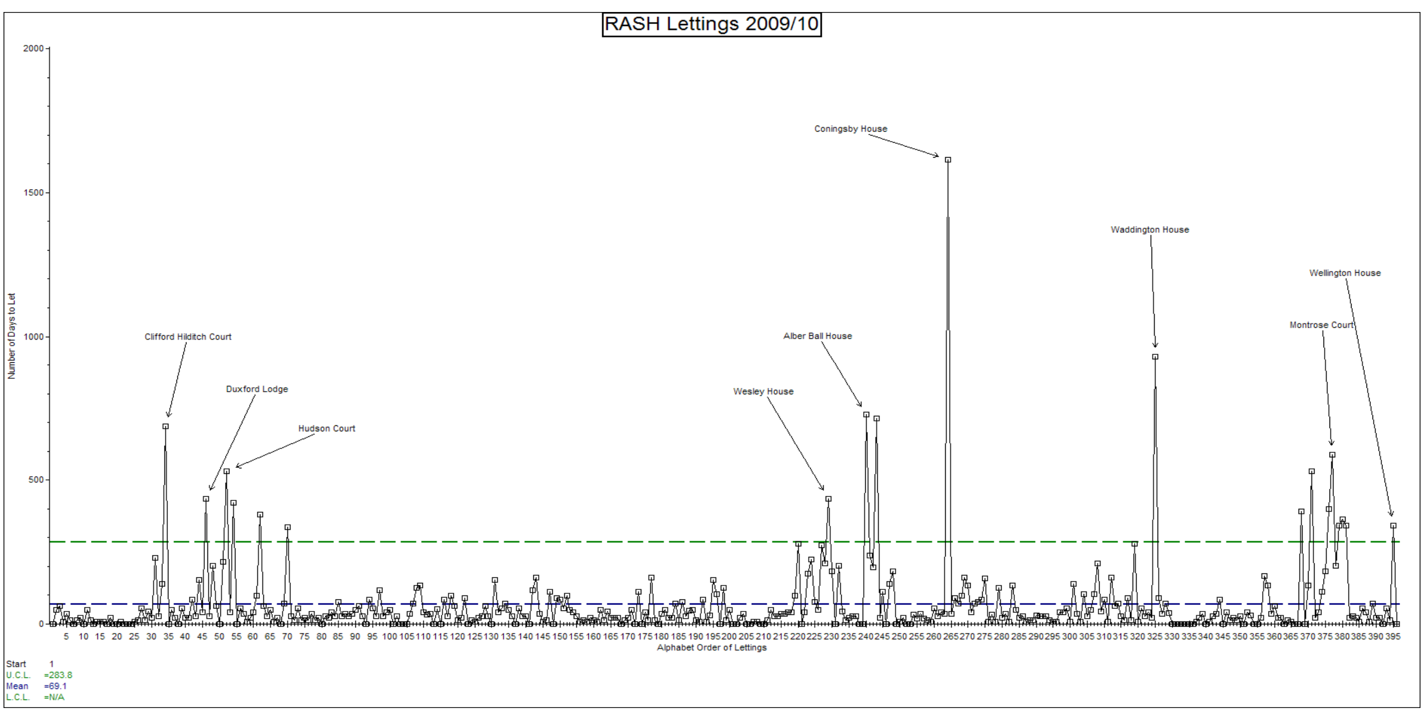
The graph below shows the improvement trend over the past two years. The number of voids which JJHT holds clearly exhibits a cyclical trend, with void number increasing over the winter periods and fewer voids in the summer. What we have seen in the past 12 months is that JJHT ability to recover much quicker to the last winter peak to spring. It is anticipated that this trend will continue.





The Best Value review also differentiated between ‘Hard-To-Let’ and ‘Non Hard-To-Let’ properties. This enabled us to measure performance on schemes where turnaround should be relatively quick.

The graph shows all the lettings that the Retirement and Sheltered Housing (excluding the North East region). On average the time taken to let a RASH property took 71 days. The graph below illustrates that the majority of lettings were done within 21 days (those perceived to be ‘easy’ to let and the those ‘hard top let’ took on average 136 days. A similar picture can be drawn for NE and General Let Teams.



The average days to allocate JJHT Non 'Hard-to-Let' properties in 2009/10 was 27 days, compared to 39 days when the Best Value report was presented in April 2009.

Hard-to-Let' properties are classified as those where local authorities are unable to nominate for vacancies and JJHT has no or insufficient waiting list to service vacancies. These properties therefore require proactive marketing to attract applicants and are potential candidates for option appraisal work.

The average time to re-let 'Hard-to-Let' properties was 153 days in 2009/10, reducing from 159 days in the previous year. The improved void performance is also demonstrated by 67.86% of lettings being achieved within 4 weeks, compared to 65.40% in the previous year.

It is well documented that the impact of returning long-term Hard-to-Let' properties to letting has a severe impact upon overall lettings time and results in bottom quartile performance (for example in the North East region if we excluded void loss and rent debit for Johnson House, Leuchars Court and Keelmans House void loss for the region would be 0.71%. Over 68% of void loss for the North East Region is generated at Leuchars Court, Johnson House and Keelmans House (these properties make up less than 8% of the regions gross annual debit).

Consequently, although the overall average time to let properties was 57 days in 2009/10, the top 85% of lettings (i.e.: excluding the harder-to-let properties) averaged 21 days which is equivalent to top quartile performance.

Northern & Midlands Benchmark Group	Re-lets avg time	Quartile
	Days	Q3
Upper Quartile	23.73	
Median	34.10	
Lower Quartile	52.15	
Johnnie Johnson Housing Trust (2008/2009)	51.50	

Longer Term Issues

In many respects concerns about void performance is indicative of a more fundamental and strategic issue regarding the future demand and market for a significant proportion of our stock.

The issues of low demand are primarily associated with our retirement stock, where void losses are significantly higher.

The attached summary highlights the 'Hard-to-Let' schemes and a brief commentary for each. A number of these schemes are already undergoing options appraisals and the report indicates other schemes that require similar reviews.

Many schemes refer to marketing plans being in place. These plans are varied and detailed, depending upon local circumstances. However, the attached Appendix 2, summarises some of the marketing initiatives that have taken place to improve demand and reduce voids.

Not included on this report is a number of schemes which are at risk of becoming ‘Hard-to-Let’. As we move forward on investment decisions we need to consider these schemes as well. For example, Berkeley Court, Manchester is the scheme chosen for the pilot of a modern, re-furbished bedsit, funded by the Efficiency reinvestment fund. The choice of this scheme was made on the basis of its relatively good location and future potential rather than as a reaction to immediate letting difficulties. This initiative is currently being evaluated.

The RASH Service Management group on 24 June 2010 will be considering a framework for identifying schemes which require option appraisals or investment to protect future demand.

Schemes with option appraisal implications are highlighted in red. This work will also be discussed with the Asset Management Group. An increased option appraisals programme may have increased resource requirements and this will be part of the considerations.

SCHEMES CLASSIFIED AS HARD TO LET (31 March 2010)

Void Loss Ranking 2008/9	Void Loss Ranking 2009/10	Scheme	Description	Void Loss 2009/10	Current Voids	Comments
2	1	Speke House, Liverpool	52 retirement bedsits/1bed flats	£41,099 19.89%	15	Marketing plan in place Option appraisal in place and considering range of alternatives including transfer to alternative landlord. Serious anti-social behaviour issues being addressed through scheme security service and legal action.
1	2	Montrose Court, Liverpool	64 retirement bedsits and one beds	£35,460 13.02%	7	Marketing plan in place. Doing a little better and have received a number of good lettings from Liverpool Access and may be down to 4 voids soon. Minor investment in reception area ongoing currently . Option appraisal in place and considering range of alternatives including transfer to alternative landlord.
5	3	Leuchars Court, Birtley	24 retirement 1 bedroom flats	£26,615 22.7%	4	Located on steep hill in Birtley. At disadvantage from smaller sized flats, higher rents/ charges due to small size, limited car parking and competition relative to demand. Very limited investment in recent years. Outcome of recent option appraisal – agreement to re-model void flat layouts to test demand. Recent marketing has been successful and we are hopeful that all flats can be re-let upon improvement. Tenants closely involved in developing improvement proposals and show commitment to scheme with enthusiastic bids for Efficiency fund improvements. Scheme will need regular review to assess business case for wider investment / long term future.
2	4	Albert Ball House, Nottingham	67 retirement 1 bedroom flats (no bedsits but very small one beds)	£26,374 8.85%	4	Marketing plan in place. Intensive marketing on –going basis required but recommend full option appraisal to consider full refurbishment (especially the reception area , lounge and wooden ceilings) or consider stock rationalisation? Good community links and currently bidding for government IT funding.

16	5	Wesley House	26, 1 bedroom retirement flats	£22,889 16.70%	2	Marketing plan in place. Very high turnover over last 2 years > 50%; therefore no waiting lists but have had intensive marketing very recently and getting more interest again. Would recommend more investment but marketing and signage also very important as schemes is on outskirts of town. No local knowledge of Extra care in the area so Area Manager investigating potential for enhanced services at scheme. Supporting People review planned in Derbyshire.
6	6	Keelmans House, Blyth	21, general let1 bedroom flats	£16,125 19.49%	4	Refurbished block – former sweet factory in central Blyth. Internal falts very marketable, but area prone to anti-social behaviour and not very desirable. Operate local lettings policy - priority is to ensure sustainable lettings and retain existing tenants, rather than clear voids at any cost. Awaiting confirmation of local authority plans to re-develop local area / supermarket, which could have a transformational impact on scheme.
N/A	7	The Bury, North Hertfordshire	49 retirement bedsit flats and bungalows	£13,982 5.11%	4	Marketing plan in place. Listed building, located in attractive Hertfordshire village, set in extensive grounds with some potential for redevelopment. Current investment in new bath rooms & kitchens but notable to conversions . Urgently recommmend option appraisal to review the options for The Bury. Can let but only limited waiting list 75 % nominations agreement and Supporting People team very demanding, which can be difficult to manage due to distance, although Scheme Manager provides good support.
11	8	Coningsby House, Sheffield	84 flats comprising 39 one and two bedroom flats and 45 bedsits – mixed use retirement and general let	£13,333 4.07%	2	No current marketing plan. Scheme situated in affluent area of Sheffield, but with limited access to shops / other amenities and transport. Unusual historic mix of general let and retirement apartments dispersed within two blocks. Supporting People contract provides support for approx 45 properties which can be located flexibly within scheme depending on needs. Recommend option appraisal with view to considering becoming a full general let scheme. Some renewals taking place - lift, new carpets etc.
N/A	9	Johnson House, Longhoughton,	19 retirement bedsits	£12,466 14.30%	2	Located in attractive village. Difficulties attracting applicants over many years. One flat re-modelled in past bedsit to one

		Northumberland				bedroom, but has had limited long-term impact. Subject to full option appraisal 3 years ago and this is currently being renewed. Outcome expected in next month. Scheme Manager enthusiastically markets scheme and tenants very involved in discussions / reviewing options. Currently undertaking innovative marketing exercise in conjunction with Northumberland Homes, utilising choice Based Letting database & culminating in open day 25 May 2010.
12	10	Ventura Court	34 retirement bedsits	£8,857 4.97%	0	Marketing plan in place. Currently full and getting more interest by advertising . Supporting People review planned in Derbyshire. Concentrating on marketing at present as once people view the scheme tend to accept.
13	11	Wooley Bridge Road, Glossop	6 general let bedsits	£7,643 44.60%	3	Part of older terraced housing, semi-refurbished and located on busy main road at gateway to Glossop. Various efforts have been made to market in conjunction with High Peak Housing. However, potential partnership discussions for housing with support never succeeded. Currently undergoing options appraisals and awaiting architects plans / costings for re-development of site to compare against disposal option.
9	12	Hudson Court, Manchester	331 bedroom retirement flats(no bedsits) .	£7,382 4.40%	0	Marketing plan in place. One of last retirement schemes to be built - looks excellent on the inside but very unattractive approach through run down estate. No voids at present but very difficult to attract people to the scheme, but once there they find it very attractive. Concerned about the demand as Northwards are creating a High rise Extra Care scheme in the locality and we may lose applicants or even tenants to the new scheme . But this could also be an opportunity if they want to extend their extra care facilities out into the community. once it is established we can explore this option as we have good links with Northwards.
N/A	13	Wellington House, Stretford	26 retirement bedsits/1 bed flats	£6,903 4.96%	0	No current marketing plan. Currently all let and excellent new Scheme Manager in place promoting the scheme. So may be possible to come of the ‘Hard-to- Let’ list next year.

						Have invested in new lighting communal furniture etc.
N/A	14	Scampton Lodge, Sheffield	40 retirement 1 bedroom flats/bedsits	£6,734 3.87%	3	Located on local authority estate, somewhat 'hidden' location. Always struggle for applicants but manage to let usually if can offer walk in shower. Have very close working relations with Sheffield North Hospital discharge unit but never been able to make formal intermediate care spaces although interest has been shown. Good candidate for bedsit refurbishment so recommend option appraisal
18	15	Mitchell House & close, Gatley	49 retirement bedsits/flats	£6,248 2.65%	0	No current marketing plan. Has been hard to let and no current waiting list but maybe due to the very high turnover and exhausting previous waiting lists rather than underlying low demand. Currently fully let. Investing in new bathrooms but again has very old kitchens. Another recommendation for Option appraisal to consider early investment and bedsit conversions.
N/A	16	St Annes House	21 retirement bedsits/1 beds	£5,905 5.36%	1	Marketing plan in place. No waiting list and some new voids although we have done very well to let recently. Money in budget this year for carpets and signage but really need to invest in reception area. Supporting People review planned in Derbyshire. Would recommend more investment and option appraisal as may be suitable for bedsit upgrades as in a very popular location.
20	17	Duxford Lodge, Manchester	34 retirement flats and very small bedsits.	£5,563 3.29%	0	No current marketing plan. No voids at present but local scheme Cartmel Court has closed and we have helped to re-house tenants - so this currently gives false impression of underlying demand. Previous marketing has focussed on developing the Chinese community with support from Tung Sing HA. Currently > 50% residents are Chinese.
15	18	Waddington House, Sheffield	37 retirement flats/bedsits Very unattractive external appearance but popular location	£4,722 2.77%	2	Marketing plan in place. Unattractive 'older style scheme' with open access deck walkways, but with nearby access to one of main roads into city centre. Need option appraisal to consider more investment in the external appearance, walkways and communal areas. Usually do eventually manage to let properties when become vacant, but no waiting lists.
10	19	Digby Lodge, Manchester	48 retirement flats mix of one beds and	£4,416 1.91%	3	Marketing plan in place. Currently 3 voids and no waiting list but shouldn't be like this as schemes is in a good location.

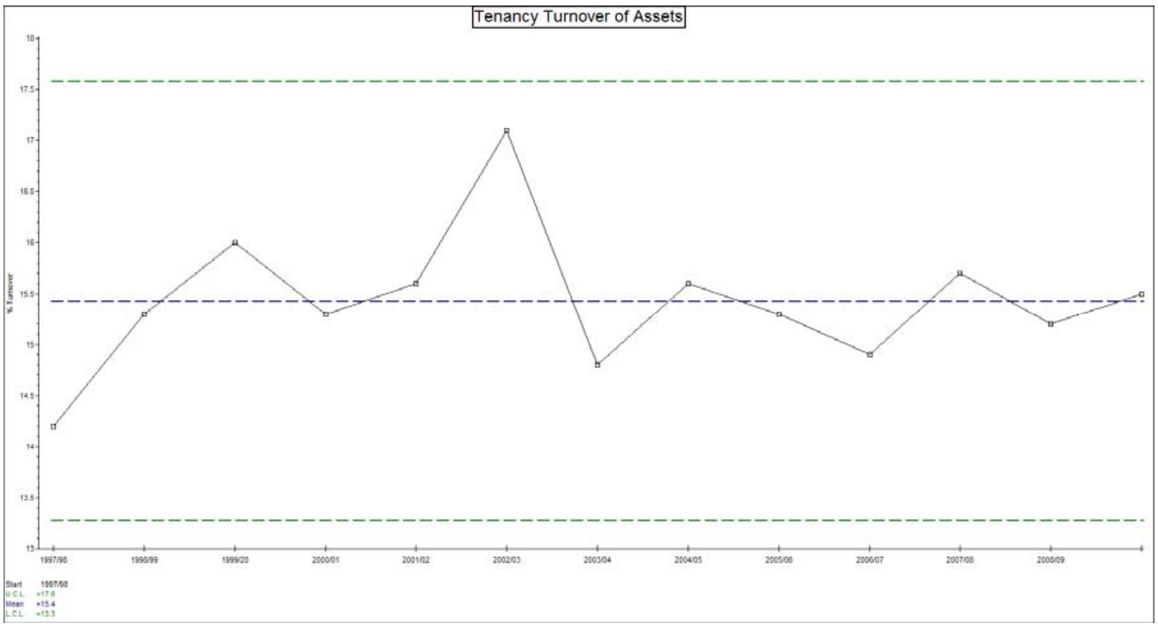
			bedsits			We have put in new bathrooms this year and are currently decorating (but won't be able to put in the furniture until we agree the procurement procedures) Would recommend carrying out an option appraisal - to consider bedsit conversion or new kitchen and heating as still have huge old fashioned storage heaters
3	20	Clifford Hilditch Court, Manchester	30, 1 bedroom retirement flats (no bedsits)	£4,295 2.77%	0	Marketing plan for scheme in place. One of the last retirement schemes to be built, high level of investment in voids and communal areas looks very attractive now. Have invested in It for tenants and considering scheme as first fully wi-fi scheme to give an edge. Currently fully occupied and even some applicants on list . Will always be hard to let due to the area, the high supply of similar accommodation but have close links with North Manchester general discharge team and could possibly look at intermediate bed spaces if go back to the previously high void levels.
N/A	21	Merlin House, Southport	12 retirement bedsits/1 bed flats	£2,869 0.61%	0	Marketing plan in place. Popular location, although high supply of flats in area creates intensive competition. Recommend option appraisal for conversion to 1 bed similar to Griffon house nearby, as they tend to be much easier to let.
N/A	22	Halifax House	34 retirement flats Good location very near hospital and other facilities	£2,521 0.14%	0	No waiting list and have just been able to let voids but limited demand. Scheme is strategically relevant to the Supporting People team in the area. Potential for better relationship with adjacent hospital, working towards intermediate care use. Worth further investment as we have considerable presence in Kirklees even if more general let and leasehold.

Terminations

Top two reasons for terminations remain as follows:

Termination Reason	Count	Stock %	%
DEATH	141	3.52%	22.71%
MOVING INTO RESIDENTIAL CARE	83	2.07%	13.37%

Turnover, including transfers between properties, remains at an average of 15.5% per year. Turnover excluding transfers was 13.5% for 2009/10



Failed Tenancies

Length of tenancy	No	%
<6 Months	46	8%
>6 Months - 1 year	44	8%
1 year - 2 years	87	15%
Other	407	70%

The above data illustrates that 8% of all tenancies may be considered as failed tenancies. Further research and insight needs to be undertaken to understand root causes to enable action planning to take place.

Leasehold Services

Sales have been a key priority for all members of the Astraliving team throughout 2009-10. Following the global financial crisis of 2008-09 which resulted in a significant downturn in the housing market, the Astraliving Team have worked exceptionally hard to maximise sales and have managed to buck the national housing trend to deliver a successful sales programme.

Astraliving have continued to deliver an effective leasehold management service for existing leaseholders although capacity to deliver day to day services has been stretched due to a range of increasing demands including:

- High volume of Section 20 consultations for major works and re-decoration programmes
- New Development Sales programme 2008-10 (68 new properties)
- The need to undertake Asbestos Surveys and Fire Risk Assessments at many leasehold schemes.
- Development of improved opportunities for customer involvement including establishment of a formally recognised Residents Association at St Andrews Court etc.
- The need to respond to the demands of TSA and Audit Commission and to implement new corporate strategies including Financial Inclusion and Equality and Diversity strategy etc.
- Increased demands from leaseholders as they become more aware of their legal rights as leaseholders within the Landlord and Tenant Act, Commonhold and Leasehold Reform Act etc.

The leasehold STATUS Survey was completed Spring 2009 and results were extremely positive with 86% of leaseholders advising that overall they were satisfied with JJHT's services. Following analysis of the report, an action plan was developed identifying key actions for improvement and has now been incorporated into the Astraliving Improvement Plan.

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The new Homeowner Handbook has been developed in consultation with leaseholders and we aim to distribute this to leaseholders and shared owners by April 2010. Development of the new Astraliving Website is progressing slowly due to limited capacity to develop this within the team.

Lease agreements for the new developments completed in 2009 have been adapted to include the requirement for leaseholders to provide evidence of a gas safety inspection for their gas appliances annually which is recognised as 'best practice' for leasehold management.

The process will require increasing management within the Astraliving team to ensure that evidence of gas inspections are provided annually and follow up action is taken as required where a breach of the lease occurs in this regard.

A new scheme offering gas servicing contracts to leaseholders was launched in Autumn 2009 and links positively to the new lease obligation. Although we don't anticipate a high volume take up of the gas servicing contract, this is a service that the Audit Commission consider is important for landlords to offer to leaseholders.

- Astraliving continues to contribute to JJHT's ethos of business excellence as evidenced in the results of the Shadow Inspection of the leasehold service and the positive feedback from leaseholders in response to the leasehold STATUS survey.

- The positive delivery of a successful sales programme has significantly contributed to the organisational financial strategy and business plan for 2009-10 and exceeded expectations following the credit crunch at the end of 2008.

- Astraliving contribute to delivery of the Financial Inclusion Strategy and have taken a more pro-active approach to delivery of information provided to leaseholders. A recent example of this is the 'Claim to Gain' leaflet produced by JJHT which has been sent out to all leaseholders with the service charge accounts and rent statements in February 2010.

- All members of the Astraliving team contributed enthusiastically to JJHT's goal to raise funds for Homeless International and actively participated in fund raising for the 40th Birthday celebrations during 2009.

- Astraliving have contributed to delivery of the Equality & Diversity Policy particularly in relation to the 'new sales' programme, working closely with a number of people with varied disabilities to enable them to purchase a share of a new home.

  In two cases, we supported the process via the 'My Safe Homes' mortgage scheme for people who are on long term benefits as a result of disability. At The Citadel, we have enabled three people with disabilities to achieve independent living and the following quote from a lady who purchased one of the houses at Almond Place and who has Aspergers Syndrome sums up what a positive difference this will make to her:

  Home ownership will: *"let me be in control of the space and I will not have to fit my life around someone else. Ownership will give me secuirty as opposed to renting whera a landlord could end the tenancey and decide to sell their property. I will be independent and will not have to live by other people's rules. I can make it my home rather than just somewhere I live."*

Astraliving business outputs / KPI performance:

- The successful management of new development sales programme has produced over £2,397,760 in capital income from equity sales to date.
- 62 of the 68 properties handed over for sale in 2009 have been sold or have sales progressing toward completion
- 5 x major work consultations and 13 external and internal re-decoration consultation programmes were undertaken during 2009 and more than 20 major work consultations (including 15 x warden call system replacements) and 15 x internal and external re-decoration consultations scheduled to complete in 2010-11
- Service Charge accounts for 2010 have been produced and issued to leaseholders
- 41 x re-sales were progressed to completion from 1st Jan 2009 to February 2010
- 1 x staircasing transaction was completed in 2009 generating £22,000 capital income
- Leasehold Service Management Group established
- Homeowner Improvement Group – outcome – contribution through consultation/focus group meetings to the development of the Homeowner Handbook

Repairs

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Jan 2010	Feb 2009
PCR003 Properties with a valid CP12 Gas Safety Certificate	% Valid CP12 Gas Safety Certificate	Percentage	Aim To Maximise		100.00	100.00			February 2010	99.93	100.00

The Asset management team have continued to deliver Value for Money (VFM). The continuing use of Procurement for All (PFA) for procurement has provided substantial savings from consortia working. PFA have also recently commissioned a consultant Pennington Choices to compile information for future VFM evidencing.

Customer involvement has been one of the keys to driving forward improvements in 2009. Customers have been involved in the preparation of a number of publications/standards as well as being involved in other related activities.

- The Tenants Repairs Handbook has been produced to provide tenants with useful information on how to order a repair as well as providing useful hints and tips which might help to reduce abortive callouts.
- The Repairs and Maintenance Service Standards has been produced
- We have recently set up the Repairs Service Improvement Group. This group will be empowered to drive forward improvements to the repairs service working through the Trusts Asset Manager. A number of quick wins have been achieved, which is a very positive start.

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Jan 2010	Feb 2009
PCR010 Percentage of Emergency Repairs completed within Target	Percentage of Emergency Repairs completed within Target	Percentage	Aim To Maximise		100.00	100.00			February 2010	99.28	99.02
PCR011 Percentage of urgent repairs completed within target	% of urgent repairs completed within target	Percentage	Aim To Maximise		100	96.27			February 2010	97.2	97.56
PCR012 Percentage of routine repairs completed within target	Percentage of routine repairs completed within target	Percentage	Aim To Maximise		99%	98.64%			February 2010	100%	100%

Other areas of activity include introducing the Repairs Appointment Pilot programme which has now been rolled out to approximately a third of the Trust's tenants. This has revolutionised the way we deliver our repairs service by offering tenants greater choice when they would like their repair carried out. In 2010 we envisage dispensing entirely with the old rigid 3 day – urgent and 28 day non urgent in favour of providing the service when customers require it.

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Jan 2010	Feb 2009
PCR004 Repairs Appointments made & Kept	% of Repairs appointments kept (where an appointment was made)	Percentage	Aim To Maximise	✓	96.00	93.90	↓	↓	February 2010	100.00	96.27
SAT009 Tenants satisfied with Day to Day repairs	% of tenants who are fairly or very satisfied with the Day to Day repairs to their home	Percentage	Aim to Maximise	✓	96.00	94.76	↓	↓	February 2010	96.51	No data for this range
PCR005 Repairs Fixed First Time	% of Repairs appointments where first time fix is achieved	Percentage	Aim To Maximise	✓	96.00	94.76	↓	↑	February 2010	96.51	83.00
PCR006 Pre-repair inspections	Pre-repair inspections	Percentage	Aim To Maximise	✓	10.00	20.92	↓	↓	February 2010	44.87	43.81
PCR007 Post-repair inspections	Post-repair inspections	Percentage	Aim To Maximise	✓	15%	50.7%	↑	↑	February 2010	20.89%	6.39%

Providing consistency in delivering services across the Trust is also a major key to achieving service improvements. The Board are already aware that P F Burridge a North East based contractor has recently been appointed to deliver the repairs service in the North East. This new contract will mirror image the NHF schedule of rates contracts that Milnerbuild and Liberty formerly MONO now operate across the majority of our stock.

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Jan 2010	Feb 2009
SAT008 Customer satisfaction of Planned Maintenance	% of customers satisfied with Planned Maintenance	Percentage	Aim to Maximise		96.00	97.00			February 2010	97.00	No data for this range
SAT009 Tenants satisfied with Day to Day repairs	% of tenants who are fairly or very satisfied with the Day to Day repairs to their home	Percentage	Aim to Maximise		96.00	94.76			February 2010	96.51	No data for this range

Measuring the “service” is also critical for benchmarking purposes. We are exploring new methods in capturing tenant feedback one area is the use of “Tickle” which is still at an early stage of use but the system is providing very quick feedback on repair satisfaction.

Contribution to Organisation Goals

- Asset Management has made great progress with customer involvement over the past 18 months. With the introduction of a number of new partner contractors we have been able to use the partnerships to improve consultation and customer choice. This is born out in high customer satisfaction across a range of projects delivered in 2009-10. We aim to build on this success through the Repairs Service Improvement Group
- Through better procurement, cashable savings have been made, examples are the repairs service, kitchen and bathroom programme, cyclical redecoration programme and recently procured water systems management programme.
- At the start of procuring the new day to day repairs service in 2007 the PFA consortia were committed to ensuring that Diversity and Equality would be a key element of the procurement process. One successful result of this requirement has been that both Milnerbuild and Liberty (Mono) are offering apprenticeship schemes to ethic minority young people, (both male and female) to work in the building industry. This has resulted in eight new apprentices being employed per year.

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Jan 2010	Feb 2009
PCR029 Co2 Reduction	% of CO2 reduction	Number	Aim to Maximise		30	21			January 2010	21	No data for this range
PCR030 Reduction of energy consumption	% reduction of energy consumption	Number	Aim to Maximise		30	21			January 2010	21	No data for this range

PM3 Stock replacement items recycled	% of stock replacement items recycled	Number	Aim to Maximise		75	87.5			February 2010	87.5	No data for this range

- Positive progress has been made in reducing Co2 emissions. Following research on the use of better technology we have been procuring and installing many new energy efficient products. Examples are dimmable lighting systems for communal areas in schemes which have proved a great success with our residents. We continue to install high efficient communal and domestic boilers, as well as high performance double glazed windows etc. We will also be working to procure a new kitchen supplier with a focus on sustainability. As part of this exercise we are currently piloting a new kitchen range at The Bury Hertfordshire that has 100% recyclable credentials.
- Asset management staff contribute to the Diversity Action Group and the Access group for Aids and Adaptations. Disability Discrimination Act reports have been produced for schemes where there are communal access points. Works are already underway to improve access for people entering our schemes.

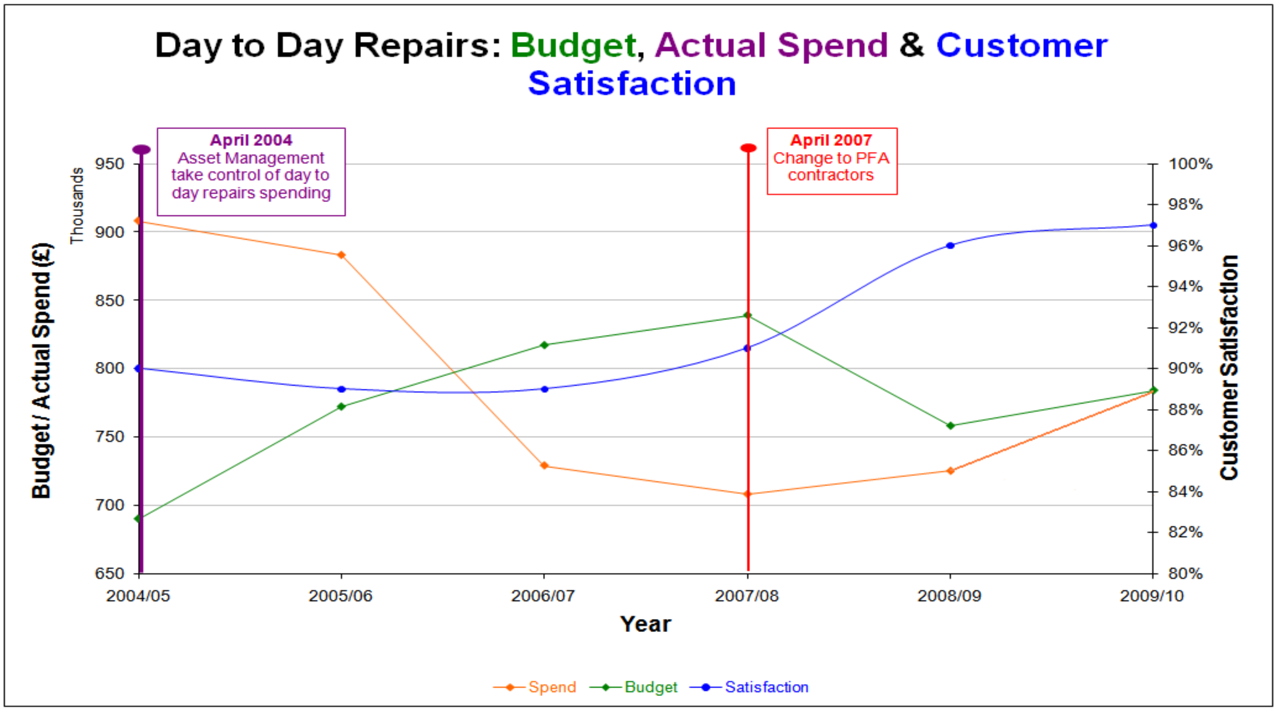
Business Outputs and outcomes

The annual budget for 2009-10 has been managed effectively with the out-turn figures showing that Assert Management has delivered the agreed programme within budget

- Savings have been delivered against the Day to Day repair budget
- 287 bathrooms were installed to properties across the Trust with savings against the original target order value
- 102 kitchens were installed across the Trust
- The cyclical redecoration programme has been delivered with £75k savings against original budget
- Customer satisfaction on day to day works is consistently high tracking at 95% satisfaction levels for 2009-10
- Customer satisfaction for planned works is also tracking at 97% satisfaction levels for 2009-10
- 100% of tier 2 KPI performance data are in the top quartile against benchmarking comparison results
- We have had a positive start to the Repairs Service Improvement Group with a number of tenant requests now actioned
- Partnering Core Groups meet regularly to discuss KPI’s, satisfaction levels as well as any complaints that have been received

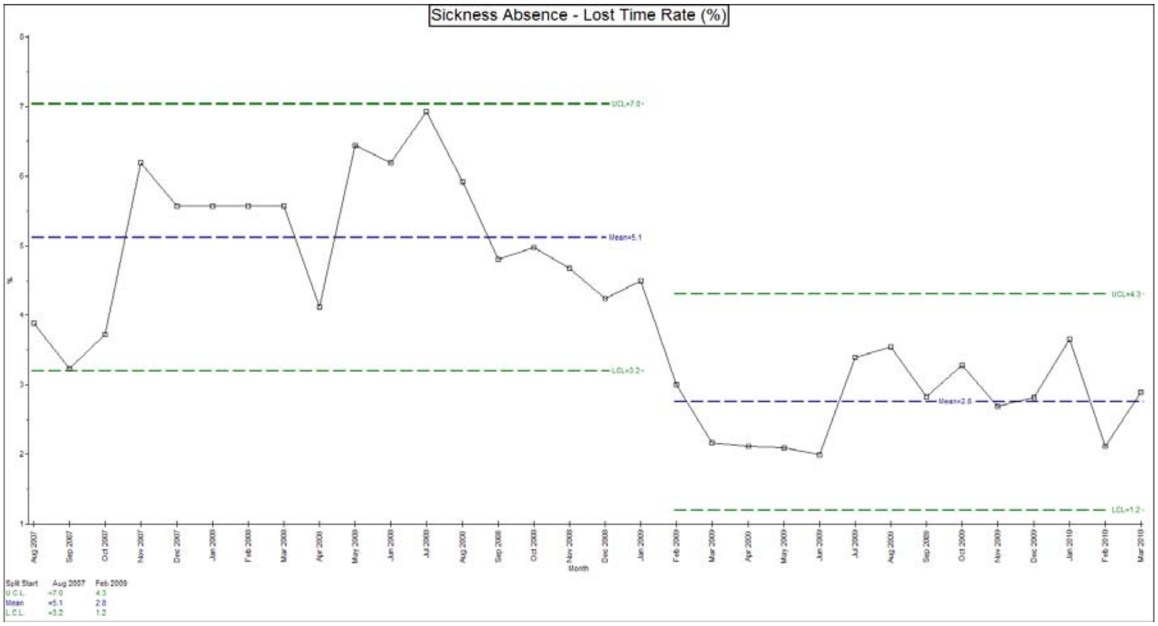
Reactive Maintenance Trends since 2004/05

The graph below demonstrates year on year improvements with customer satisfaction rising and spend against budget decreasing over previous years. This is due to the introduction of the PFA repairs service and continued targeted investment in our stock.



Organization & Culture

PI Code & Short Name	Description	Type	Gauge Format Type	Current Status	Current Target	Current Value	Short Term Trend Arrow	Long Term Trend Arrow	Last Updated	Jan 2010 Value	Feb 2009 Value
OC001 Labour Turnover-separation %	Labour Turnover-separation %	Percentage	Goldilocks		16.00	14.99			March 2010	14.97	21.17
OC002 Sickness absence	Sickness absence-Lost time rate %	Percentage	Aim To Minimise		03.50	02.11			Februar y 2010	02.11	02.16
OC003 Workforce BME	% of JJHT workforce from BME group - month by month	Percentage	Goldilocks		10.00	08.33			March 2010	07.94	06.19
OC004 Workforce with Disability	% of JJHT workforce with a disability - month by month	Percentage	Aim To Maximise		07.00	08.65			March 2010	08.57	09.28



Sickness Absence - Lost Time Rate (%)
UCL=7.0
Mean=5.1
LCL=3.2
UCL=4.3
Mean=2.8
LCL=1.2
%
Month
Split Start Aug 2007 Feb 2009
U.C.L. =7.0 4.3
Mean =5.1 2.8
L.C.L. =3.2 1.2

Appendix 1 Benchmarking Comparison Result (see attached)

Appendix 2

SUMMARY OF MARKETING PLANS / INITIATIVES

Background:

The Trust owns over 2,500 retirement properties, mostly in traditional 'sheltered' housing schemes with circa 800 bedsits.

In general demand for sheltered housing has been low for several years and the situation appears to be worsening.

As a response to maximise lettings and minimise voids the Trust has had a proactive approach to property marketing for several years and have presented our approach at CIH conferences.

Our Best Value review in 2009 focussed on improving performance management of voids and ensuring the processes were robust so that turnaround times are minimised.

Our main focus going forward is on effective marketing to attract applicants and options appraisals for schemes.

A brief summary of the types of approach to marketing are summarised below.
Branding:

We have a positive corporate approach to branding retirement housing – not sheltered – with an emphasis on a positive lifestyle choice.

Product and service initiatives:

We have undertaken a range of initiatives to improve / re-position retirement products and services:

- Re-modelling of schemes e.g.: to larger flats, mixed tenure;
- Re-modelling as extra care with community floating support from scheme base;
- Developing new dementia café for local community;
- Creating new markets e.g.: Chinese Communities in Manchester & Liverpool, with specialist support partners e.g.: Tung Sing;
- An increased Asset Management investment programme targeted at improvements to meet Decent Homes & beyond e.g.: re-design of entrance areas, aids and adaptations;
- Commissioning of professional interior design services to give communal areas a quality feel – the 'hotel;' approach;
- Re-modelling of bedsits to create separate bed area & upgrading internal finishes;
- Re-modelling of small 1 bedroom flats to create double bedrooms;
- Furnished tenancies & furnished showflats;
- Events at schemes – invitations to local community to attract interest / spread the word;
- Health Eating initiatives in conjunction with Age Concern.
- Internet facilities and training within schemes & for local community.

Promotion and Communications:

We have undertaken numerous initiatives to promote schemes in addition to the normal routes through local authorities and more latterly CBL systems:

- Involving residents in suggestions for marketing plans e.g.: as standard agenda item at annual scheme meetings;
- Incentivising residents e.g.: 'refer a friend' scheme;
- Developing relationships with applicants by inviting them to scheme events prior to moving in;
- Creating Stakeholder /contact lists & community profiles for schemes e.g.: hospital discharge teams / disability groups with invites to open days and regular mailings on vacancies;
- Local mailshots targeted by postcode, demographics;
- Articles & advertorials in community publications e.g.: Gateshead Older Person Newsletter;
- Banners and 'For Let' boards outside schemes;
- Posters / leaflets distributed to community groups, GP's, social services;
- Internet advertising through JJHT website and external sites e.g. HousingCare;
- Estate Agents incentive scheme to find a successful applicant;
- General adverts in press, radio media, Age Concern publications etc;
- Bus advertising;
- Yellow pages;
- Cross selling to applicants for other JJHT schemes;
- Promoting JJHT by attending events e.g.: Buxton Liberation Day, Manchester Valuing Older People, Sheffield 50+, Disabled Living Event Cheetham Hill, Stockport Young at Heart,
- Move in incentives e.g.: decorating allowances, carpets, aids and adaptations.

In addition, we have produced guidance and trained staff on marketing so that staff are aware of how to present voids and to make a good impression when undertaking accompanied viewings.