

22/23

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Improvement Plan Summary

The Group's improvement activities over the last financial year and for the year ahead.

Creating
better
Living Solutions

ateb

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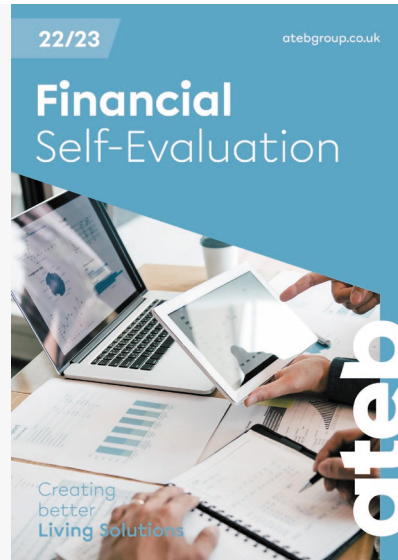
Forward

The ateb Improvement Plan is a forward and reflective look at the Group's improvement activities over the last financial year and for the year ahead.

This Improvement Plan should be read as part of our wider self-evaluation exercise that can be found in the following accompanying documents:



Governance
Self-Evaluation
FY 22/23



Financial
Self-Evaluation
FY 22/23



Performance
Self-Evaluation
FY 22/23



Getting back on track...
3 Year Strategy
FY 22/23

Please let us know your thoughts or queries on anything we raise,
if it matters to you, it matters to us.

We are ateb

ateb consists of 3 companies:

This Improvement Plan should be read as part of our wider self-evaluation exercise that can be found in the following accompanying documents:

- **ateb** - Housing Association
- **Mill Bay Homes** - A house builder that recycles 100% of profits back to ateb
- **West Wales Care & Repair** - Advice and adaptations for the older and more vulnerable communities of Ceredigion and Pembrokeshire

Collectively we aim to create better living solutions for the communities we serve by always seeking to deliver the right customer outcomes as effectively as we can.

ateb is regulated by the Welsh Government and is required to regularly self-evaluate its performance against 9 regulatory standards. Where we identify areas of improvement, we include it in our improvement plan and monitor and report on progress. Our Improvement Plan is therefore a dynamic document that will evolve with our operating environment.

The 9 regulatory standards are:

- **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.
- **RS8** - Assets and liabilities are well managed.
- **RS9** - The organisation provides high quality accommodation.

ateb Vision

Improvement should be seen as the day job.



Strategy

Our strategy sets the scene for where our improvement efforts should focus. We have the following 3 strategic aims:

- Improve customer service
- Serve more people
- Increase business effectiveness

The current operating environment is very challenging for our customers, team, and partners. This will impact how much and how quickly we are able to deliver the improvements we identify. We will always prioritise those improvements that have the biggest impact to our customers in terms of safety and service delivery.

Each year we will issue a report looking at what happened over the last year and what we are planning for the next year. Please let us know what you think as if it matters to you, it matters to us.

Did we improve over the last year? FY 22/23

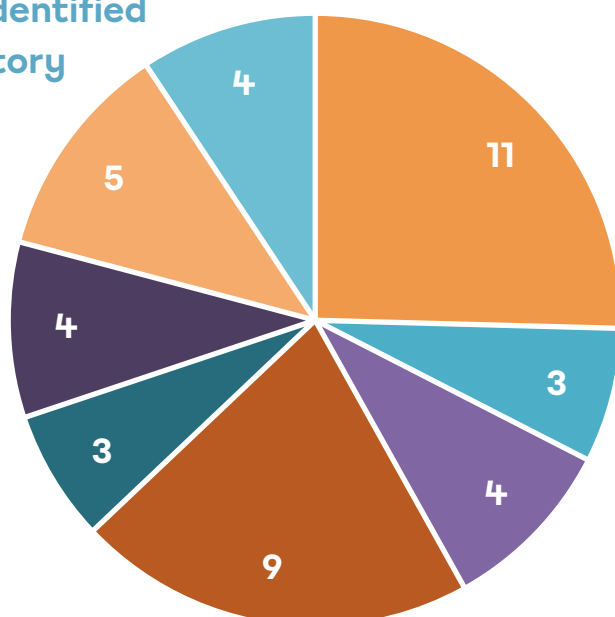
The key areas of improvement focus derived from our current 3-year strategy are as follows:

- 1 | Lower energy costs
- 2 | Keep our customers' homes and services compliant.
- 3 | Work with others to help our customers more.
- 4 | Invest in our customer services.
- 5 | Keep our services affordable.

Against this focus we proposed a series of 43 improvement actions that we would start work on. However, FY 22/23 turned out to be a difficult year for several reasons:

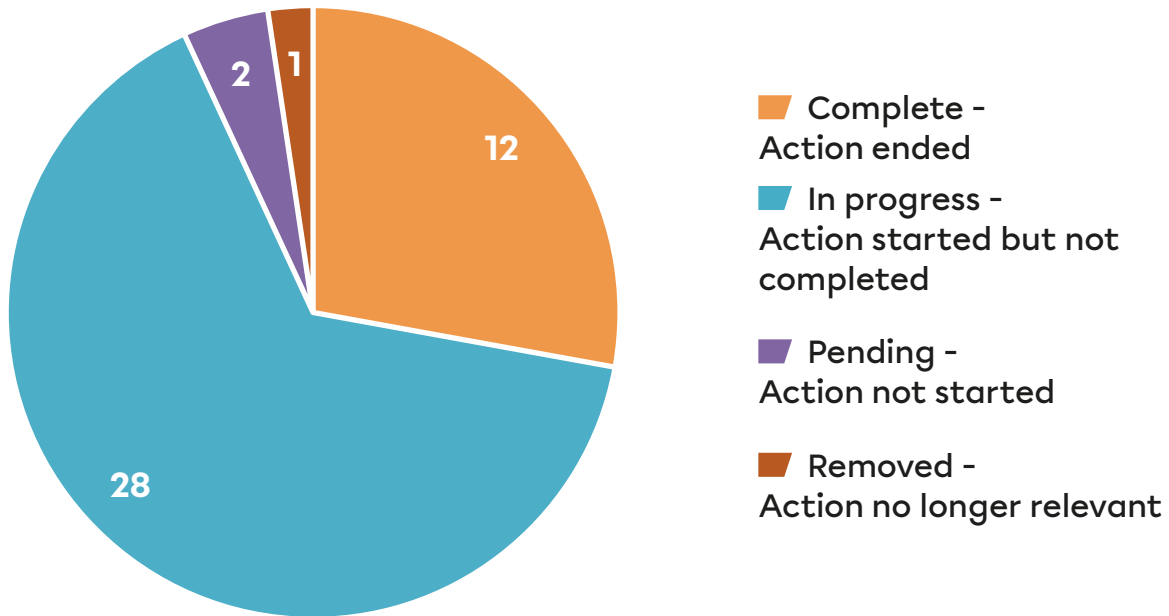
- Economic turmoil
- Supply chain issues – materials and contractors
- Introduction of new housing legislation – Renting Homes Wales Act
- Recruitment

Improvement Actions identified by Regulatory Standards



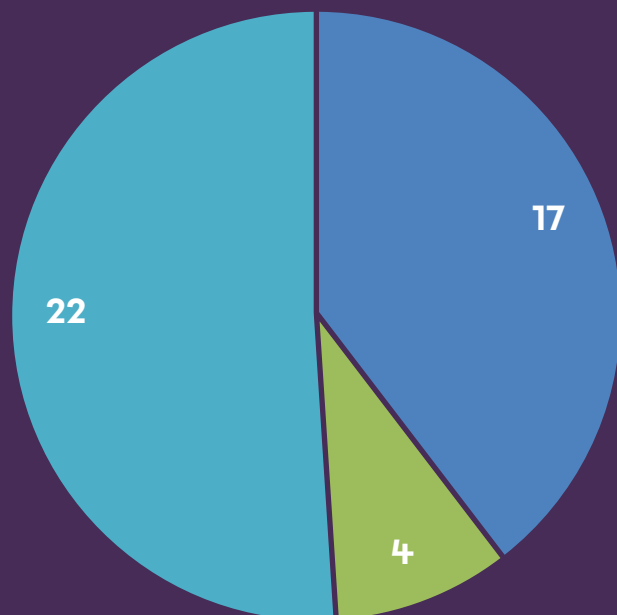
Please note, there were no improvement actions identified with respect to RS8. Status of the 43 Improvement Actions identified in FY 22/23:

Improvement Actions - progress made in FY 22/23



Outcomes of Improvement Actions - as at March 23

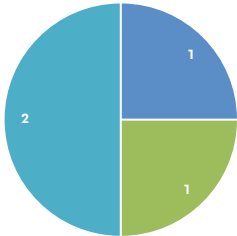
- Good** - Action outcome and timeline as expected
- Not so Good** - Action outcome and/or timeline not as expected
- Okay** - Action outcome and/or progress slightly behind expectations



Highlighted Improvement Areas

1: Improvement actions relating to customer engagement RS 3:

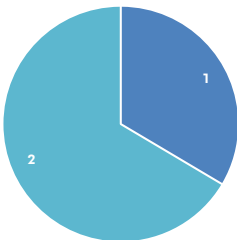
RS3 | Diversity related actions



- Not so Good**
IP/005 - Equality Impact - has taken longer than originally planned
- Okay**
IP/011 - BAME stakeholder map
IP/032 - Adoption of CHC code
- Good**
IP/031 - Deeds not words

2: Improvement actions relating to customer involvement in service design RS 4:

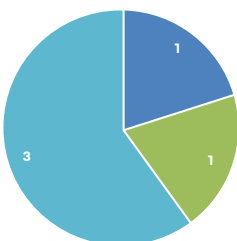
RS4 | Customer Engagement



- Okay**
IP/019 - Customer Solutions Team refocus
IP/021 - Residents' Association Engagement
- Good**
IP/004 - Customer Engagement in RHWA

3: We are undertaking the following RS/7 improvement actions:

RS7 | Improvement Actions



- Not so Good**
IP/027 - P2P Review
- Okay**
IP/028 - Digital Team Refocus
IP/016 - Operational effectiveness
IP/038 - Business planning software
- Good**
IP/018 - MBH Purpose

4: In respect to RS7 - please also note that Mill Bay Homes' On-lending requirements is reported within our management accounts reporting to Board on a quarterly basis.

Are we meeting our 5 strategic priorities?

1 | Lower energy costs

Progress

Operationally we are still adjusting to the impacts of new working practices (hybrid) and analysing how our physical infrastructure e.g., van fleet, office facilities etc. can be adapted in the future. We are relocating our office facilities from our poor energy efficient building in Meyler house to new Haverfordwest facilities that will be planned to meet required 'modern' energy standards. We also have included the ability to switch our van fleet to electric when we have agreed how best to accommodate a peripatetic workforce operating generally from home with limited access to charging.

This will obviously remain a long-term improvement action over coming years and represents a complex planning, operational and resourcing action. Lowering carbon across our 3,000 + homes is a significant challenge and will take time. The commencement of our 3-year Optimised Refit Programme (ORP) (supported by the Welsh Government) and our collection of energy passport certificate (EPC) data through our stock survey programme is a great start but only scratches the surface at this stage.

3 of our funders are now requiring Environmental Social and Governance (ESG) reporting on our activities. This will be a growing trend and will help us understand our progress against circa 45 ESG outcomes.

New homes will obviously have better energy performance built in; we need to ensure that these new homes support the older homes whilst we are increasing standards for all. We will continue to evolve these improvement actions through FY 23/24.



Outcomes

- All new developments from now are being built to the required new energy design standards proposed by the Welsh Government
- Monitoring of new homes technology is being undertaken and compared to traditionally constructed homes
- £3m forward funding proposed for ORP3 that will support improvement works to approximately 116 homes through such works as external wall insulation, solar panel installation and battery storage
- New office facilities will improve our energy performance as compared to current facilities once agreed
- Fleet renewal includes the ability to switch to electric fuel source during the current lease agreements
- The Home Energy scheme has provided advice and support to over 333 distinct households with £7.5k provided in financial assistance
- New stock surveys now capturing energy passport data for future analysis
- ESG reporting

Summary

This remains a big challenge and we are at the early stages of delivering lasting impact to our customers' homes, but some progress has been made with more to come.



2 | Keep our customers' homes and services compliant.

Progress

Generally good performance especially as it was a difficult year to implement changes of the scale required by the Renting Homes Wales Act (RHWA). Positive work has started in respect to improving our understanding of equality, diversity and inclusion of our customer base. The greater understanding we have - the better we will be able to shape our services to all customer needs i.e., Access All Areas.

The team has mapped everyone's base level of training required to deliver their various roles. This will now be monitored during the next year and evolved to fit the needs of our service delivery.

Developing a Strategic Asset Management strategy for the future when the future is changing all the time is very difficult. Technological advances, customer acceptance of new ways of using energy in their homes and how investment is funded are key, fundamental issues to be addressed over the next few years. These decisions do have a significant impact to long term costs.

Outcomes

- All new lets follow full RHWA requirements
- Voids standard aligned to Fitness For Human Habitation (FFHH) standards
- Voids process aligned to RHWA requirements
- All operational policies and processes reviewed and updated to reflect new RHWA requirements
- Converted contracts developed ready to be sent to existing contract holders in early 23/24
- Team training and support to help deliver new processes introduced due to RHWA requirements
- Passport to Work for all role profiles agreed and will be implemented in FY 23/24
- New approach to stock condition surveys to accommodate energy reporting/analysis needs. Digital systems to be updated to meet needs in 23/24
- Policies being updated to reflect building safety requirements, outstanding policies to be completed in FY 23/24
- How we use ED&I information more to inform our service delivery and development of our Strategic Asset Management (SAM) approach incorporating WHQS23 principles moved to FY 23/24

Summary

RHWA has been the biggest change to housing legislation for many years. The planning and implementation involved a considerable effort from many areas of the business. The new occupancy contracts give our customers improved rights. Our changes to systems came into effect by the required dates but will obviously evolve over time.

One significant early change from RHWA implementation is to void standards and processes. Voids now receive more work and attention up front rather than after our customer has taken occupation. Anti-Social Behaviour (ASB) processes have also seen changes in the year to improve the responsiveness to concerns arising from communities.

Background business effectiveness has been improved with the development of our Passport to Work and our new approach to stock condition surveys. The latter point will enable better investment decisions to be made in the future, benefitting our customers' use and running costs of their homes which will be enhanced through the development of our SAM approach. Our ED&I action plan was approved by Board with its implementation now being focused through FY 23/24 and 24/25.



3 | Work with others to help our customers more.

Progress

All our improvement actions remain in progress with work started but not completed within the financial year. Generally, there has been positive collaborative groundwork developed across our service areas with more development to come in FY 23/24. Our Development Services agreed a new purpose statement for Mill Bay Homes to create more effective collaborative arrangements that should result in more bespoke solutions for development opportunities and economies of scale over the long term.

We continue to discuss opportunities to create more development opportunities with our Local Authority and other partners including the development of a new collaborative business growth plan for West Wales Care & Repair, which will seek to build on existing strong relationships with the statutory services. We are in the early stages of a new process to encourage local suppliers to get involved with us. Developing procurement friendly processes for local suppliers to work with is, is a long-term sustainability aim.

ateb aspires to being a community partner of choice, we have mapped our community and other partners who we can work with to encourage a greater, more diverse community impact.

Outcomes

- New purpose for Mill Bay Homes – greater connection to ateb’s housing need priorities
- Business Growth plan developed for WWCR – but more work to do
- Increased engagement with Local Authorities and other partners
- New local supplier/contractor procurement process
- Relationship mapping completed – community development and BAME support that will inform our relationship development focus in 23/24 and 24/25

Summary

Creating and cementing great relationships takes time especially when everyone is going through the same operational challenges as ourselves. Some positive groundwork in understanding our partners’ needs and offers has been made with more to come in FY 23/24.

4 | Invest in our customer services.

Progress

5 of our customer services improvement actions have been completed and 1 removed. IP/26 was amalgamated in the year with IP/15 – WWCR Business growth strategy as the 2 actions significantly crossed over. One of our larger projects IP/27 – procurement to pay (P2P) is taking longer than first planned, this improvement impacts all aspects of the Group and time is needed to ensure we have the right underlying systems and data. Coupled with RHWA changes, there has been plenty of service improvement in the year with the promise of more to come next year.

Our planned refocus of our Housing Solutions Team was undertaken to better align with the demands of greater connection to customers, including annual home visits. Our new plans for our Digital Team were agreed and recruitment commenced, and new procurement processes were introduced.

15 of our improvement actions remain in progress and will feature in our FY 23/24 plan. Two key areas of feedback in the year relate to maintenance and customer communication. Maintenance performance has faltered during and post-covid for a range of reasons (recruitment, contractor availability, materials etc), improvement actions will be targeted at this area to ensure we maintain customer confidence.

With the way we work evolving to a hybrid model, all our employment contracts and reward structures were updated to reflect the DNA we strive for. The new systems need bedding in through FY 23/24, but the platform created offers far more flexibility and agility for our team.



Outcomes

- Community Development Plan developed and shared
- Hate Crime policy agreed.
- Deeds Not Words pledge signed
- Self-evaluation reports publicised
- Procurement strategy phase 1 issued
- Customer Solutions Team refocus complete
- Digital Systems Team refocus to recruitment stage
- New reward framework
- ateb trust – focus for generating grant support for communities was agreed in principle
- New hybrid employment terms
- Brand refresh project completed
- Communication strategy agreed and commenced
- Business Continuity plan relaunched to include lessons from covid

Summary

Customer service expectations never stand still. The year saw a lot of foundation work undertaken including changing of systems and processes to accommodate RHWA. The emerging issues of maintenance satisfaction and customer communication will need to be planned into new actions. Some actions such as purchase to pay and development software, needed significant planning around existing systems to ensure that their introduction would deliver the right outcomes.

5 | Keep our services affordable.

Progress

The second half of the year with energy and other costs spiking, spiralled the cost-of-living crisis to new levels for all. Our rent increase for FY 23/24 was capped at 6.5% compared to the prevailing 10.1% CPI on the review date. ateb had some of the lowest rent increases in Wales over the preceding 3 years.

We invested in more advice services including energy advice, supported with a hardship fund and community welfare and digital training aimed at customers accessing more budgeting support and advice. We co-produced with our customers actions that ateb would deliver to support our customers through the cost-of-living crisis. We undertook a review of our service charges and VFM within our procurement that both resulted in actions to support better cost outcomes.

If we are to keep rents and service charges low, then we do need to keep costs of service provision under control. This is a challenge in a high inflation environment but all efforts in FY 23/24 will continue to keep rents affordable.

Outcomes

- Affordable Rent policy updated – rent increases capped at 6.5% against 10.1% CPI
- Service charge review completed – further updates to follow
- Cost of Living and Fuel Poverty Strategy co-produced with customers and hardship fund introduced
- VFM in procurement audit undertaken with actions to complete in FY 23/24

Summary

This remains a key challenge for next year. We have increased our hardship fund provisions and with the changes to our Housing Solutions Team, we should be able to offer greater targeted support to our customers and communities.

Ultimately, inflation and interest rate increases, plus rising expectations of property investment (RHWA and WHQS23 etc.) will drive costs up and place pressure on business financing. Ensuring our Mill Bay Homes and WWCR subsidiaries remain viable during this time will require differing approaches due to their funding and customer markets. However, the same principle of keeping service and products affordable will apply.

Appendix 1 gives more detail on improvement actions progress over the year.

What are we planning to improve over the next year? FY 23/24

The 5 key areas of improvement focus will remain the same as last year. However, this year we will report our improvement against the 9 regulatory standards (please see our separate self-evaluation reports for more details).

As mentioned above, these improvement actions are dynamic and will update through the year as new priorities emerge. Our Board and leadership group review improvement plans quarterly through the year to ensure progress and updates are being monitored effectively.

All our improvement actions will help us to remain compliant and achieve our strategic aims of:

- 1 | Improving Customer Service
- 2 | Serving More people
- 3 | Increasing business effectiveness

Given the continuing operational challenges all sectors of service provision are facing, we have prioritised our improvement actions to the core improvement challenges for the year.

RS1 - The organisation has effective strategic leadership and governance arrangements which enable it to achieve its purpose and objectives.

We will continue to develop our improvement actions that are currently in progress as follows:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
IP/001	To work with the Group on Plan A – Lower carbon in our operations. (Corporate) (RS1)	Lower costs and carbon	10-year plan for measuring and lowering carbon in operations agreed.
IP/008	Introduce a required Learning & Development programme (Passport to Work) and an enhanced L&D programme (Personal Development) where the teams are empowered to deliver their own enhanced training programme mme. (Corporate) (RS1)	Team better equipped/skilled to take ownership of their service outcomes	PTW is fully operational.
IP/016	Develop partnership opportunities with local authorities (and other partners) to deliver new housing. (Development) (RS1)	We have a positive partnership with LA to support the delivery of new homes over the long term	Tangible development collaborations being delivered.
IP/032	Adopt the revised CHC Code of Governance 2021 and challenge ourselves to continually improve and meet the recommended practices. (Corporate) (RS1)	Improved basis for governance	CHC code 2021 Implemented.
IP/034	Define clearly what ‘working at ateb’ looks like through engagement with the teams. (Corporate) (RS1)	Teams take full advantage of what ateb has to offer	Clear offers made with more teams gaining access to a range of offers
IP/035	Implement our Communications strategy to ensure our customers, teams and partners know what is going on and how they will get the best from the ateb Group companies from their perspective. (Corporate) (RS1)	Raise customers’ awareness and understanding of ateb’s services and support.	Strategy demonstrates better approaches and results from communication generally
IP/037	Promote our H&S management arrangements through comms operations. (Corporate) (RS1)	Maintain effective & understood H&S management arrangements	Increase in H&S awareness and culture engagement across the Group

RS2 - Robust risk management and assurance arrangements are in place

We will continue to develop our improvement actions that are currently in progress as follows:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
IP/033	Evolve our Constitutional Framework to adapt to our growing business needs. (Corporate) (RS2)	Our Constitutional Framework is up to date at all times	Constitutional Framework fully updated and compliant
IP/039	Review our Business Continuity Planning approach post covid experience. (Corporate) (RS2)	To learn how we could do things better in situations where the continuity of the business is being impacted	BC planning training complete and BC process operational

RS3 - High quality services are delivered to tenants

We will continue to develop our improvement actions that are currently in progress as follows:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
IP/005	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)	Services are accessible to all.	We will have delivered the improvements identified.
IP/014	Agree and set up options for hot desking/desk spaces with potential co-location opportunities with health, housing, and social care. (Customer) (RS3)	Team has greater opportunities to collaborate with key partners.	We will have adequate hot desking availability for WWCR team across area of operation.
IP/019	We will complete our phase 2 Customer Services Team review, which will include how we deal with repairs. (Customer) (RS3)	We have the right roles and resources to deliver an excellent customer service.	Team re-focus completed. [Aligned with new reactive repairs improvement action]
IP/025	Improve our WWCR IT systems to ensure that performance reporting is fully functional. (Customer) (RS3)	Performance reporting is streamlined.	Adoption of new 'Care & Repair' database.

RS4 - Tenants are empowered and supported to influence the design and delivery of services

We will continue to develop our improvement actions that are currently in progress as follows. We have identified 1 new improvement action at this time:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
IP/010	We will develop a relationship map of all key stakeholders who can support the delivery of our Community Development improvements. (Customer) (RS4)	ateb is seen as a trusted partner.	We agree relationship gaps and implement the engagement activities required to better support our communities.
IP/011	We will develop a relationship map of all key stakeholders who can support BAME customers. (Customer) (RS4)	All ateb customers are empowered and included.	We have access to key resources for our BAME customer base.
IP/012	We will work with community partners to further enhance our “welfare service” offer. (Customer) (RS4)	We actively promote the health and wellbeing of our customers.	We will deliver community days / events across our communities with a focus on health and wellbeing.
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) (RS4)	We actively promote the health and wellbeing of our customers.	We will deliver community days / events across our communities with a focus on health and wellbeing.
IP/021	We will review how Tenant and Resident Associations (TARA) are constituted and supported by ateb practically and financially. (Customer) (RS4)	We support our communities effectively and help create and support more TARA.	We have an agreed constitution for TARA and have an increased number in operation.
IP/022	We will explore the creation of an “ateb trust” to fund community initiatives. (Customer) (RS4)	ateb can support communities financially to meet their aspirations and ambitions.	ateb trust is launched.

RS4 - Continued

IP/024	Implement post inspection procedure in full including independent QA inspections. (Customer) (RS4)	Repairs are carried out to a high standard and to the satisfaction of customers.	Minimum of 5% post inspections undertaken with external contractors collecting customer satisfaction from a minimum of 25% of customers
NEW	Review customer communication channels for the right tone of voice, timeliness of messaging and platform mixes used to communicate. (Customer) (RS4)	Customers' satisfaction with how we communicate is improved	Improvements made to communication channels that our customers have approved.

RS5 - Rents and service charges are affordable for current and future tenants

We are currently reviewing where we can add additional value to this regulatory standard in addition to our current measures.

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
TBA	Under review		

RS6 - The organisation has a strategic approach to Value for Money which informs all its plans and activities

We will continue to develop our improvement actions that are currently in progress as follows:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
IP/015	Explore the viability of new service offers in response to any gaps in provision to support the wider delivery of health and wellbeing, ensuring that we maintain the integrity of our core service delivery. (Customer) (RS6)	We deliver the best possible outcomes to customers of WWCR.	We have defined our business growth aspirations.
IP/017	Continue to support smaller, local suppliers and contractors to join our supply chain. (Corporate) (RS6)	To help develop opportunities in the communities we serve	Monitoring and reporting of local supply chain (and smaller companies) within our supply chain

RS6 Continued

IP/043	We will increase our understanding and reporting of VFM across the Group and highlight cost/value savings. (Corporate) (RS6)	Our cost effectiveness will be improved meaning we can do more	VFM metrics and monitoring increased to include spend and contract management
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RS7 - Financial planning and management is robust and effective

We will continue to develop our improvement actions that are currently in progress as follows:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
IP/016	Develop partnership opportunities with local authorities (and other partners) to deliver new housing (Development) (RS7)	We have a positive partnership with LA to support the delivery of new homes over the long term	Tangible development collaborations being delivered
IP/027	Upgrade our finance systems including new Procure-to-Pay (P2P) and budgeting/ business planning monitoring and reporting. (Finance) (RS7)	More effective ways of paying our suppliers and managing our costs	P2P system over SAGE200 finance package introduced with primary link to HMS reactive repairs interface
IP/028	Review our Digital Team processes and resources. (Finance) (RS7)	A better alignment of resources to the long-term digital needs of the Group	Team recruited with digital improvement projects identified and prioritised
IP/038	Agree and implement a new business planning software solution that integrates with the accounts, budget monitoring and 30 year financial planning software. New integrated solution should be capable of undertaking multiple sensitivity and scenario planning appraisals. (Finance) (RS7)	We have an enterprise software solution that allows managers to take control of their service delivery and the business, to understand our planning options through interactive modelling	Workday used for FY budget and business planning exercises

RS8 - Assets and liabilities are well managed

We have identified 1 new improvement action at this time:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
NEW	Review use of covenant metrics to align to industry best practice and approach given the changing operating circumstances e.g. decarbonisation investment (Finance) (RS8)	Ability to better plan investment in homes over a 30 year financial period	New set of metrics aligned to how future investment in homes will be needed

RS9 - The organisation provides high quality accommodation

We will continue to develop our improvement actions that are currently in progress as follows.

We have identified 1 new improvement action at this time:

Imp Ref	Improvement Action	Improvement Outcome	Target For FY 23/24
Imp Ref	Improvement Action	Improvement Outcome	Target 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)	Reduce our carbon footprint associated with providing our customers’ tenancy and support services	ORP 3 Decarbonisation investment and works being delivered to plan

RS9 Continued

IP/007	We will review ateb policies to ensure full compliance with the Building Safety Act. (Customer) (RS9)	ateb is compliant with new legalisation.	All new legislation adopted and being implemented
IP/009	Develop our strategic asset management (SAM) capabilities including reviewing and understanding the implications of WHQS 23 on the business plan of ateb. (Customer) (RS9)	To ensure our homes are compliant to the proposed new standards	New SAM strategy to support decarbonisation of homes over the next 10/20 years and WHQS requirements.
NEW	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. (Customer) (RS9)	Improvement of key customer service metrics (time, quality, communication, right first time) for the reactive repairs	New systems agreed and progress made with its implementation



Chief Executive Summary

Improvement Plan

It has been a difficult year to push improvement as fast as we would have liked. There are large pressures on our team to deliver ‘today services’ whilst considering reshaping for the future. Having said that, big changes were made to bring the Renting Homes Wales Act (RHWA) into operation which will start to help improve the services customers receive. You will also see we have completed a number of our improvement actions set as part of our 3-year strategy launched in 22/23.

As we enter year 2 of the strategy, we have changed some of the systems behind the improvement plan to make improvement a bit more dynamic. Each directorate now has its own improvement plan that cross references improvement to the regulatory standards and our strategic aims and objectives, this allows us to see what the improvement is impacting. There are some new improvement actions added as things always change. The System Improvement Project focusing on repairs, directly addresses the customer’s desire to see the repairs service change. This project will engage customers and all ateb teams in identifying and planning the required changes to service.

Plenty still to do with progress to date, managing expectations will continue to be key through the next year as so much change continues to swirl around us all. Thanks for all the improvement efforts being made.



Appendix 1

Improvement Plan FY 22/23 – What have we achieved?

1 | Lower energy costs by making our customers' homes greener
 – climate change needs to be addressed, our homes must lower their carbon output

Ref	What are we planning to do?	What should this improve?	Progress
IP/01	Plan A - Save costs by lowering carbon in our operations. We will review our operations and identify the areas we can reduce carbon over the next 5 - 10 years. (Corporate) (RS1)	Reduce our carbon footprint associated with our Group operations	IN PROGRESS Limited to date. Fleet licenses now have option to move to electric vans when infrastructure allows. New office facilities will be built to required environmental standards
IP/02	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)	Reduce our carbon footprint associated with providing our customers' tenancy and support services	IN PROGRESS £3m forward grant support from the Welsh Government to support carbon reduction. Initial contracts started at the end of FY 22/23 focused on insulation and electrical power usage and storage. Survey data being collected to aid home energy passports. Home Energy Team supporting multiple customers.
IP/03	Plan C - Help with our customers' energy bills by lowering carbon in new homes. We will improve the environmental standards of our new build specifications to meet WG requirements. (Development) (RS3)	Reduce our carbon footprint associated with providing new homes and estates.	IN PROGRESS All our new affordable homes meet the required new build standards set by the Welsh Government. Technology and supply chains are changing rapidly, and we expect more development in this area over the next few years.

2 | Keep our customers' homes and services compliant

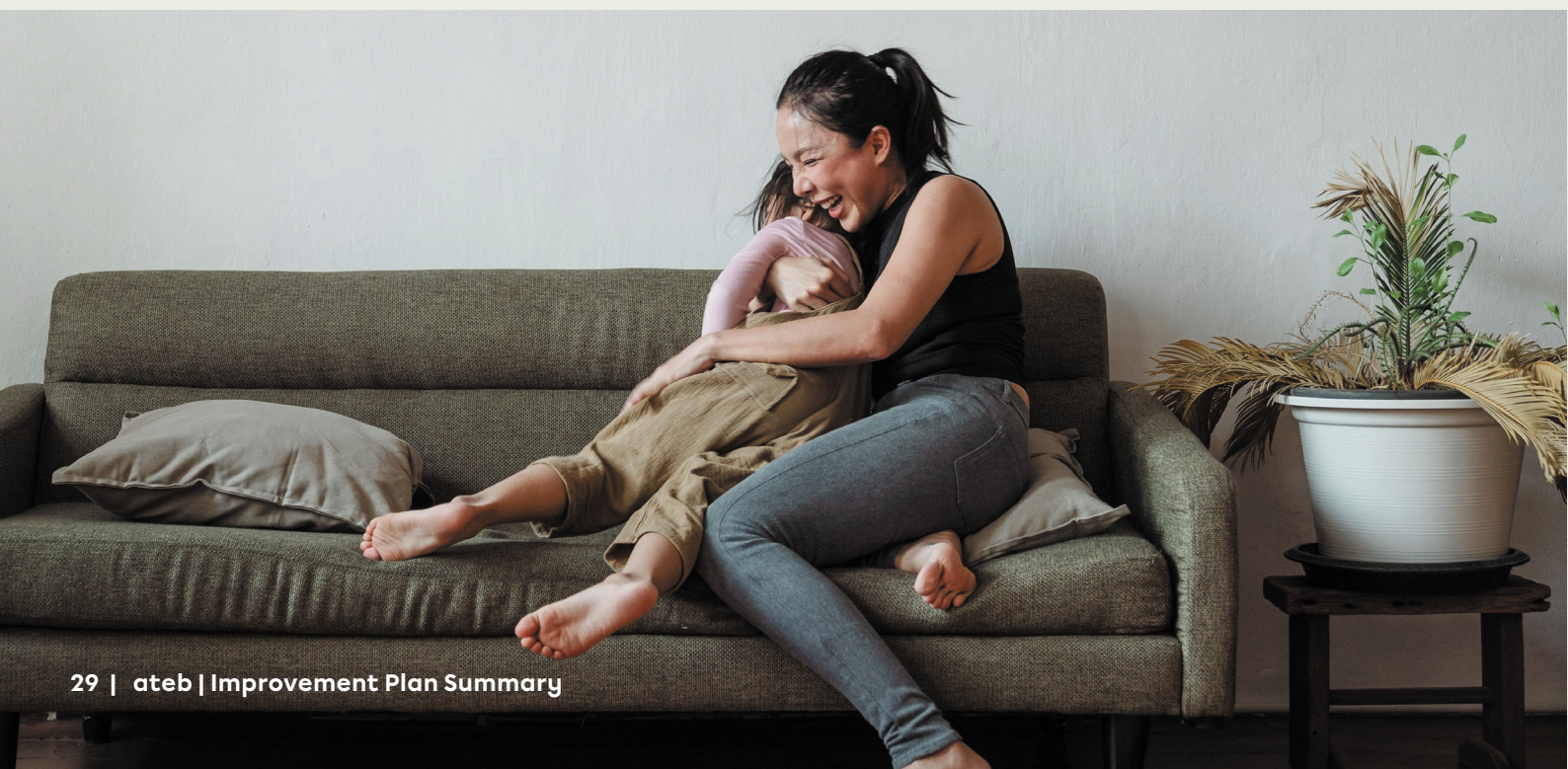
– there is significant change over the next 3 years to the regulation that governs our work, we must accommodate and adapt to these challenges

Ref	What are we planning to do?	What should this improve?	Progress
IP/04	We will Implement the changes required to our systems (inc. ASB) to be compliant with RHWA in the timelines prescribed including effective communication and training with our customers, teams and partners. (Customer) (RS3)	We are compliant with Renting Homes Wales Act (RHWA) when we let and manage our homes.	COMPLETE Number of roadshow events held. Regular social media communications. Training sessions held with team. Target implementation dates met. Systems will continue to evolve.
IP/05	We will continue to evolve and improve how we use and report equalities data relating to customers applying for and moving into ateb homes. (Customer) (RS3)	ateb homes and services are accessible to all.	PENDING Formal data refinement and collection to commence in FY 23/24
IP/06	Explore how we handle voids and disrepair claims in relation to Fitness For Human Habitation (FFHH). (Customer) (RS9)	We respond appropriately to disrepair claims.	COMPLETE New voids standard and RHWA compliant systems operational. Systems will continue to evolve
IP/07	We will review ateb policies to ensure full compliance with the Building Safety Act. (Customer) (RS9)	ateb is compliant with new legislation.	IN PROGRESS Policies have been developed. New process development underway.
IP/08	We will implement our Passport to Work (PTW) to ensure our teams are compliant with legislation and best practice and have the skills/knowledge to work competently and safely. (Corporate) (RS3)	We will be compliant with legislation and best practice.	IN PROGRESS Passport to Work register complete. Roll out of register and monitoring to take place in FY 23/24
IP/09	Develop our strategic asset management capabilities including review and understand the implications of the WHQS 23 on ateb's Business Plan. (Customer) (RS9)	To ensure our homes are compliant to the proposed new standards	PENDING Stock Condition data collection improved but more knowledge of WHQS23 to be established to ensure appropriate investment planning over the longer term

**3 | Work with others to help our customers more
 – we need to work with likeminded organisations to solve
 ever increasing and more complex problems**

Ref	What are we planning to do?	What should this improve?	Progress
IP/10	We will develop a relationship map of all key stakeholders who can support the delivery of our Community Development improvements. (Customer) (RS4)	ateb is seen as a trusted partner.	IN PROGRESS Identified key partnerships – developed relationship map, now need to identify gaps and target relationship development.
IP/11	We will develop a relationship map of all key stakeholders who can support BAME customers. (Customer) (RS4)	All ateb customers are empowered and included.	IN PROGRESS Identified key partnerships – developed relationship map, now need to identify gaps and target relationship development.
IP/12	We will work with community partners to further enhance our “welfare service” offer. (Customer) (RS4)	The health and wellbeing of our customers.	IN PROGRESS Actively engaged with partners throughout year to complement our Community Welfare service e.g. Data Poverty initiative.
IP/13	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) (RS4)	The health and wellbeing of our customers.	IN PROGRESS Events held with key partners to promote health and wellbeing during cost-of-living crisis.
IP/14	Agree and set up options for hot desking/ desk spaces with potential co-location opportunities with health, housing, and social care for WWCRC teams. (Customer) (RS3)	Team has greater opportunities to collaborate with key partners.	IN PROGRESS Hot desking space identified in Aberystwyth. Work ongoing to identify appropriate desk spaces with key partners across areas of operation.

IP/15	Develop a Business Growth strategy for WWCR that considers options for collaboration. (Customer) (RS3)	We deliver the best possible outcomes to customers of WWCR.	IN PROGRESS Initial draft presented to Board however further work required. Decluttering pilot in Pembrokeshire started in January 2022, due to end 31st March 2023. Initial discussions held with Ceredigion County Council to trial similar service in Ceredigion. Delivery of warm packs for the Keep Warm Keep Well project delivered.
IP/16	We will continue to explore and develop collaborative relationships to build new homes. (Development) (RS3)	The provision of new homes that relate directly to the needs of our community	IN PROGRESS Current environment very competitive but continuing to look for opportunities
IP/17	Continue to support smaller local suppliers and contractors to join our supply chain. (Corporate) (RS6)	To help develop opportunities in the communities we serve	IN PROGRESS Early days, new processes introduced to support local suppliers. changes being brought in by procurement reforms will encourage this further.
IP/18	Review Mill Bay Homes' purpose to better support long term ateb Group priorities	Flexible solutions agreed for each site MBH undertakes against ateb priorities at the time	IN PROGRESS New purpose agreed requiring MBH to work more closely with ateb on developing greater VFM and tenure diversity.



4 | Invest in our customer services

– we know we can do things better for our customers so we will be working on things behind the scenes to ensure customers can get what they want, when they want.

Ref	What are we planning to do?	What should this improve?	Progress
IP/19	We will complete our phase 2 customer services' organisational review, which will include how we deal with repairs, lettings and first point of contact. (Customer) (RS3)	We have the right roles and resources to deliver an excellent customer service.	IN PROGRESS Customer Team refocus now complete. Scheduling Team outstanding.
IP/20	We will communicate our community development aspirations to all teams, customers, and key stakeholders. (Customer) (RS4)	Our Community Development Improvement strategy is accessible to all.	COMPLETE All internal stakeholders, customers and third sector partners have had overview of our aspirations.
IP/21	We will review how Tenant and Resident Associations (TARA) are constituted and supported by ateb practically and financially. (Customer) (RS4)	We support our communities effectively and help create and support more TARA.	IN PROGRESS Consultation meetings held with current TARA. Proposals to be developed for consideration.
IP/22	We will explore the creation of an "ateb trust" to fund community initiatives. (Customer) (RS4)	ateb can support communities financially to meet their aspirations and ambitions.	IN PROGRESS Initial discussion held without full agreement on final mechanisms. Budget provisionally agreed for 23/24.
IP/23	Develop a Hate Crime Policy and deliver training to all customer facing teams. (Customer) (RS1)	We respond appropriately to reports of hate crime.	COMPLETE Board approved new policy in Q3 22

IP/24	Implement post inspection procedures in full including independent Quality Assurance (QA) inspections for responsive and planned maintenance repairs. (Customer) (RS3)	Repairs are carried out to a high standard and to the satisfaction of customers.	IN PROGRESS Implemented for planned works. Work required for reactive repairs pending more resources.
IP/25	Improve our WWCR IT systems to ensure that performance reporting is fully functional. (Customer) (RS3)	Performance reporting is streamlined.	IN PROGRESS Initial meeting held with Care and Repair Cymru Project Manager and staff 28th Feb to identify requirements for Agency. Estimated implementation date is April 2024
IP/26	Develop a Business Growth strategy for WWCR. (Customer) (RS3)	We create better living solutions for the people of West Wales where we have identified opportunities	REMOVED this action is being delivered as IP/15
IP/27	Upgrade our finance systems including new Procure-to-Pay (P2P) and budgeting/ business planning monitoring and reporting. (Finance) (RS7)	More effective ways of paying our suppliers and managing our costs	IN PROGRESS Initial scoping exercise complete
IP/28	Review our Digital Team processes and resources. (Finance) (RS7)	A better alignment of resources to the long-term digital needs of the Group	IN PROGRESS Initial digital strategy and resourcing proposals under review by the Leadership Group
IP/29	Complete the integration of our new homes development/Project Management software. (Development) (RS7)	Better modelling of risk with new sites and better project management of sites under contract	IN PROGRESS Pro Val & Sequel being used but wider team roll out required following appointment of HOD
IP/30	Launch our new 3-Year strategy, self-evaluation, Improvement Plan and updated Vision documents. (Corporate) (RS1)	Better clarity of what we need to do and why over the longer term	COMPLETE available on the website

IP/31	Increase our commitment to Deeds Not Words in respect to ED&I. (Corporate) (RS1)	More understanding and engagement with all to ensure we achieve #AccessAllAreas	COMPLETE Signed pledge and adopted principles
IP/32	Continue to develop our Boards' governance systems and resources including adoption of the 2021 Code of Governance and increased ED&I governance integration. (Corporate) (RS1)	Our governance systems and resources are aligned to our regulatory needs and Vision outcomes	IN PROGRESS Board to review with the proposal to adopt in May 23
IP/33	Review/update our Financial Regulations, Schedule of Delegated Authority and Constitutional Framework. (Corporate) (RS1)	Our key control documents align to the needs of the business and regulatory standards	IN PROGRESS FR and SDA approved other reviews planned for FY 23/24
IP/34	Continue our working @ ateb improvement programme by embedding Achieve and the new Reward framework. (Corporate) (RS1)	The hybrid workplace environment allows us to attract and retain the best skills	IN PROGRESS Achieve adopted. Reward framework agreed. Both to be evolved through FY 23/24 and promoted. Hybrid working model to be promoted with the launch of new Agile Working Procedure. Establish and populate the People Hub with information for teams. Working on new benefits guides, procedure updates and People Team updates
IP/35	Implement our Communications Strategy to ensure we engage with our customers and raise awareness of the services/support we offer. (Corporate) (RS1)	Raise customers' awareness and understanding of ateb's services and support.	IN PROGRESS Strategy and plan being used to develop better communications generally. Strategy to be evolved through FY 23/24. Still struggling to get buy in from some teams in terms of promoting work they do. Will relook at the strategy following on from the comms plans we have and reset some priorities

IP/36	Implement phase 1 of our new Procurement Strategy. (Corporate) (RS6)	Improve our procurement effectiveness over the long term	COMPLETE New process adopted. Policy awareness and training programme roll out planned for FY 23/24
IP/37	Further develop our H&S communication, awareness and monitoring programmes. (Corporate) (RS1)	To ensure we remain compliant at all times and H&S is embedded in our DNA	IN PROGRESS New reporting and monitoring implemented this year to be reviewed in Q4
IP/38	Increase our budgeting, business planning, ALR and financial reporting capabilities to give more detailed and quicker information to the business. (Finance) (RS8)	To allow the business to make quicker and better investment and financial decisions.	IN PROGRESS New budget planner being implemented Q4. Workday software to be implemented FY23/24
IP39	Review our Business Continuity Planning approach post covid experience. (Corporate) (RS2)	To learn how we could do things better in situations where the continuity of the business is being impacted	IN PROGRESS BC plan has been reviewed by IA and training on new approach needs to be provided in FY 23/24



5 | Keep our services affordable

– in the current climate, this is a critical issue to our customers

Ref	What are we planning to do?	What should this improve?	Progress
IP/40	We will review our Affordable Rent Setting policy annually to ensure rents and charges continue to be affordable to our customers. (Customer) (RS5)	This should keep our homes and services as affordable as possible	COMPLETE In operation for annual rent review process
IP/41	We will complete a review of service charges to ensure services provided and charged for are affordable and provide good value for money to customers living in Independent Living schemes. (Customer) (RS5)	We minimise the risk of occupancy failure due to unaffordability	COMPLETE Review of rents and service charges in Independent Living schemes completed and report shared with Board to help inform rent setting for 23/24.
IP/42	Develop a fuel poverty and cost of living strategy that informs how we will further support customers, including reviewing our home energy project and hardship fund support. (Customer) (RS5)	Customers are provided with money advice and support, rent arrears are reduced and homes sustained	COMPLETE Cost of Living and Fuel Poverty plan co-produced with customers and delivery ongoing.
IP43	We will increase our understanding and reporting of VFM across the Group and highlight cost/value savings. (Corporate) (RS6)	Our cost effectiveness will be improved meaning we can do more	IN PROGRESS Undertook an Internal Audit on VFM in Q4 and will be using best practice recommendations to improve how we capture VFM in procurement during FY 23/24

Talk to us...

if it matters to you, it matters to us.

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