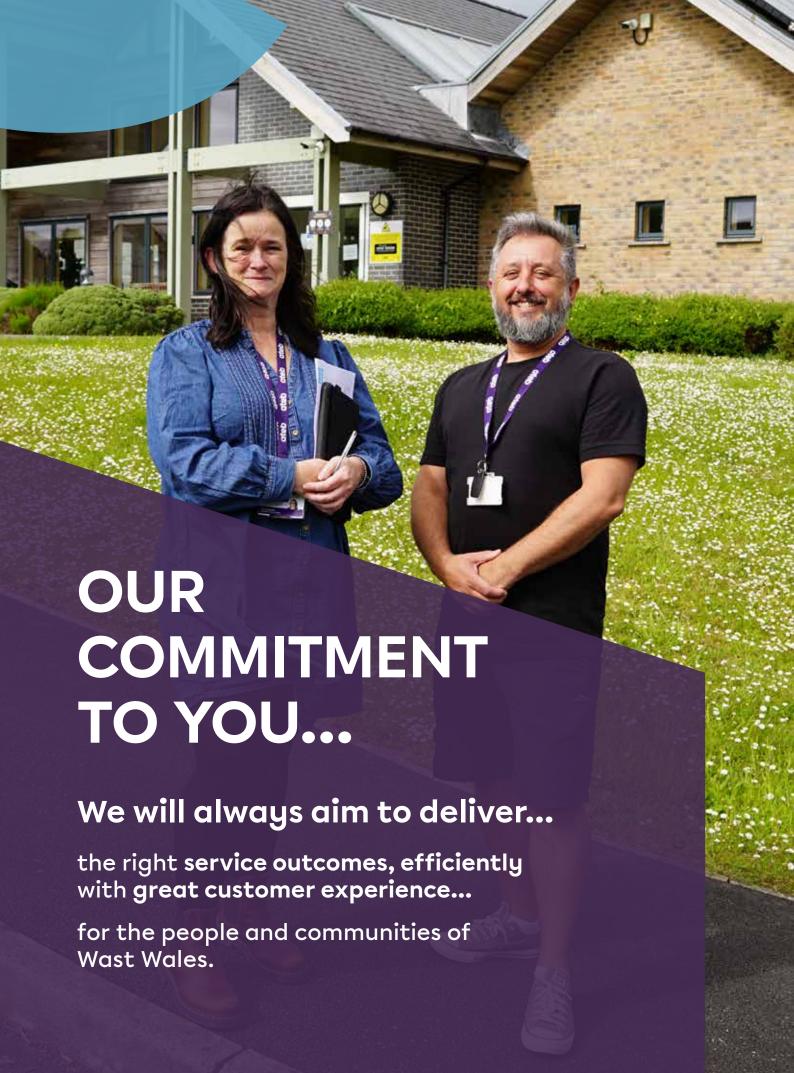
Performance Self-Evaluation



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Purpose of this **Performance evaluation**

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

- Governance (including tenant services): Compliant - Green
- Financial Viability: Compliant –
 Green

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

The nine Regulatory Standards are as follows:

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

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

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

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

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

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



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

- The Board knows the organisation complies with each regulatory standard, including reference to key performance data and sources of assurance.
- We comply with the Code of Governance that the organisation has adopted.
- We have used the principal evidence which has been relied upon in conducting the evaluation.
- The process of evaluation has been robust.

- The needs and views of tenants have been understood and considered as part of the self-evaluation.
- We have identified our key strategic risks and associated controls, or signposted to other documentation where the key risks are articulated.
- Our continuous improvement plan identifies any gaps or areas for improvement and shows how these will be addressed.



A Board overview of 23/24

A Board overview of 23/24

David BirchChair of ateb Group Limited

A Steady Year

We undertake some great work across a range of communities in West Wales. West Wales Care and Repair (WWCR) offer private owners and renters services to help them stay independent in their homes. We were proud to of helped 1,000's of customers improve their position, with near 100% positive feedback on the experience they received. We know many of our older community in Ceredigion and Pembrokeshire are safer and more active as a consequence of our work.

Mill Bay Homes (MBH) is a fully owned subsidiary of ateb, its only focus is to maximise the aims of ateb and with any profits it makes being recycled back to ateb, MBH is a vital tool to bridge funding gaps caused by the strain on traditional grant income. With the housing market slowing down generally, MBH slowed down its activities too but we still manged to make a small gift aid return in the year and set up for a better return for the next financial year. Of the homes sold, 7 were shared ownership which clearly helps first time buyers to get onto the housing ladder.

ateb had a stretched year in terms of dealing with a range of regulatory changes and outcomes, primarily from the Renting Homes Wales Act (RWHA). In terms of performance we generally performed well against our peers, but our customer voice remains focused on what more we can do with our repairs service. We are working behind the scenes to improve this key area of our work against a national deficiency of skills and supply chain resources in this area.

Compliance performance is always a high Board priority. Our focus is on gas, electric, fire, lifting, asbestos and water safety, all of which have performed well over the year in terms of making sure we have checked our customers installations are safe. This work remains vital to the operational effectiveness of ateb as a landlord. ateb has again performed well compared to the sector, but our teams remain focused on doing more.

The demand for homes has never been higher, every home we have available receives a lot of interest regardless of location or size. This position is shared across all affordable housing providers in West Wales, all are seeing any new supplies of homes being constantly outstripped by demand. This puts a lot of pressure on the system, generally meaning the letting of homes has become a very pressurised process. We clearly wish this was different and with 73 new homes delivered last year, we are trying to address the imbalance.

Within our communities we continue to make good progress with supporting anti-social behaviour complaints. The numbers have increased but so has our ability to support positive outcomes. We work closely with other agencies to ensure this outcome is within our capacity as a landlord, we never generally have all the answers at our disposal.

To all our teams across the whole ateb Group, thank you for all your efforts in difficult circumstances and with new pressures. Our performance has remained steady and we have a clear focus on those things we want to improve. As always, by working together we will make better and longer lasting differences to the customers we serve.



High quality services are delivered to tenants

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

Customer Facing Services

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

Customer Outcome Management

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

Customers should expect ateb to...

"Always deliver the right customer outcomes as effectively as we can."

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

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

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

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

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



Operational framework

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

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

The Welsh Government Tenant Satisfaction Survey

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

In 2023/24 we undertook the survey with ateb customers. 24% of ateb customers responded.

Welsh Government Tenant Satisfaction Survey Results. Fairly satisfied or above %

	og Kosarts.		
METRIC	2019	2024	COMMENTS
How satisfied or dissatisfied are you with the service provided by ateb?	85%	81%	We have seen a small drop in satisfaction levels.
How satisfied or dissatisfied are you with the overall quality of home?	85%	87%	We have seen a small increase in satisfaction compared to 2019. Great to see almost 9/10 of ateb customers are satisfied with the overall quality of their home.
Generally, how satisfied, or dissatisfied are you with the way ateb deals with repairs and maintenance?	83%	74%	A decline in satisfaction – we know there is more we need to do to improve our service to customers in this area.
How satisfied or dissatisfied are you with your neighbourhood as a place to live?	85%	83%	Satisfaction levels not changed much – and good to see most of our customers are satisfied with their neighbourhood as a place to live.
How satisfied or dissatisfied are you that your rent provides value for money?	82%	81%	Generally unchanged despite cost-of-living challenges in the last couple of years.
How satisfied or dissatisfied are you that your service charges provide value for money?	Not asked	65%	18% of customers told us they were dissatisfied – work for ateb to do!
How satisfied or dissatisfied are you that ateb listens to your views and acts upon them?	74%	64%	There were a lot of people who didn't have a view either way – 16% told us they were not satisfied.
Thinking about your home specifically, how satisfied, or dissatisfied are you that ateb provides a home that is safe and secure?	Not asked	85%	Great to see so many customers being satisfied that their home is safe and secure.

METRIC	2019	2024	COMMENTS
How satisfied or dissatisfied are you with the way ateb deals with anti-social behaviour?	72%	86%	Significant increase in satisfaction.
How satisfied or dissatisfied are you with opportunities given to you to participate in ateb's decision making processes?	Not asked	64%	There were a lot of people who didn't have a view either way – 7% told us they were not satisfied.
How satisfied or dissatisfied are you that ateb gives you a say in how services are managed?	Not asked	59%	There were a lot of people who didn't have a view either way – 10% told us they were not satisfied.
To what extent do you agree with the following statement - "I trust ateb"	80%	73%	Disappointing to see satisfaction levels reduce slightly – we need to gain the trust of our customers.



Welsh Government Regulation Survey

On a quarterly basis during 2023/24, ateb completed and returned a survey to Welsh Government on our operational and financial performance. These surveys were then reviewed by our Regulator. Our performance during the year showed the following:

	22/23		23/	2 4	
METRIC	Q4	Q1	Q2	Ó3	Q4
Gas safety checks in date	100%	99.7%	99.7%	99.7%	99.5%
Completed gas safety remedial works	100%	100%	100%	100%	100%
Fire Risk Assessments in date	97.2%	100%	100%	100%	100%
Water safety testing compliance	86.5%	100%	100%	100%	100%
In date annual asbestos inspections	100%	99.5%	91.4%	94.3%	96.4%
Electrical safety check	97.8%	98.8%	98.7%	96.7%	97.8%
Emergency repairs (completed within target)	100%	100%	100%	100%	100%
Routine repairs overdue (per property)	0.24	0.30	0.21	0.28	0.24
Properties let to alleviate homeless	31%	51%	83%	76%	66.6%
% Of void homes	1.42%	0.9%	1.08%	1.21%	0.97%
Current tenant arrears	3.3%	2.4%	2.4%	2.7%	3.2%
Current tenant arrears (self-payers)	1.3%	1.6%	1.4%	1.9%	1.9%
% Of tenants in arrears 8 – 12 weeks	2.9%	2.7%	1.9%	4.0%	3.4%
% Of tenants in arrears 13 – 26 weeks	1.3%	2.1%	2.1%	2.5%	2.6%
% Of tenants in arrears 27 – 52 weeks	0.2%	0.3%	0.3%	0.4%	0.4%
% Of tenants in arrears 52 weeks plus	0%	0.03%	0.03%	0.01%	0.1%
Number of NOSP's issued	3	6	10	11	16
Number of evictions	0	1	0	0	0

High Quality Services Assessment

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



Letting Homes

We aspire to making sure our homes are always let.

In Facts:	19/20	20/21	21/22	22/23	23/24
New homes made available	101	112	64	59	73
Number of homes relet (including mutual exchanges and transfers)	268	204	244	209	155
Average days to relet a home	5.9	59	17	64	52
% of rent lost due to empty homes as a % of annual rent roll	0.2%	1.3%	0.6%	1%	1.4%

Our assessment of the year:

We continued to see high levels of customer satisfaction, with 100% of people who responded and were let a home during 2023/24, telling us they were satisfied with the lettings process. 100% of customers who responded told us they were satisfied with their home and the community it was situated in, 4 weeks after moving into their home.

We supported Pembrokeshire County Council in meeting the needs of people identified as homeless, with 66% of homes let in 2023/24 allocated to people who were accepted as priority need homeless by the Local Authority.

We saw a small decrease in the average days taken to relet a home, and an overall increase in the percentage of rent loss due to empty homes because of a high number of voids during the year in our extra care settings.

Key areas we are planning to work on to improve:

We will launch with our partners the new Choice Based Lettings policy for Pembrokeshire, which will ensure ateb meets it obligations under new homelessness legislation.

Income Collection

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

In Facts:	19/20	20/21	21/22	22/23	23/24
Rent received (Inc. Service Charge) £M	15,747	16,175	16,948	17,659	19,517
Current tenant arrears as a % of annual rent roll	1.7%	1.6%	1.9%	2.5%	3.2%

Our assessment of the year:

It has been another difficult year for customers with increased costs of living having a significant impact, and we have seen an overall increase in current customer arrears. 1,422 money advice and support interventions were provided during the year by our Housing Solutions Team to support customers struggling to pay their rent.

We have continued to take a support first approach and as a result there were no evictions during the year for non-payment of rent for the 4th consecutive year.

Key areas we are planning to work on to improve:

We will review all income collection processes to include reporting and monitoring and when to signpost customers to external agencies for additional support to ensure our income is maximised and the risk of customers losing their homes due to rent arrears is minimised.



Customer Advice and Support

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

In Facts:	19/20	20/21	21/22	22/23	23/24
Reception visits	10,280	0	0	0	0
Phone calls handled	57,666	27,000	31,147	31,620	30,227
Out of hours calls handled	2,313	2,246	4,637	3,750	3,444

Our assessment of the year:

The Customer Services Team received 30,227 calls during 2023/24. 92% of calls received during office hours were answered, with 8% of calls being missed or abandoned. The average time taken to answer a call was 16 seconds.

We continue to see an increase in the number of customers registered to use the digital customer portal as an alternative option for our customers to contact us. As of the 31st of March 2024, 1,189 customers, 37% of ateb households, had signed up to the portal.

Key areas we are planning to work on to improve:

- We will carry out an Equalities Impact Assessment on our 1st point of contact services and develop a plan to deliver improvements identified.
- We will launch our customer communications framework that we have been developing with customers over the last 12 months.



Maintenance

We want to get things fixed to your satisfaction.

In Facts:	19/20	20/21	21/22	22/23	23/24
Repairs completed	12,616	8,036	8,772	10,886	12,125
Satisfaction with repairs (ateb)	99.7%	N/A	99%	100%	100%
Repairs % by partner contractors	23%	20%	17%	31%	20%

Our assessment of the year:

We completed significantly more repairs during 2023/24 than in the previous 3 years and the number of repairs being reported and completed has almost returned to pre pandemic levels. The increased demand, lack of availability of suitable contractors and difficulties to recruit to vacancies in the ateb maintenance team has led to a longer than usual number of days taken to complete a routine repair - 36 days on average against a target of 28 days, despite this we have continued to see a very high level of satisfaction with our ateb maintenance teams where they have carried out the repair, and 100% of all emergency repairs were completed within the target time.

Towards the end of the year, we established a new Minor Works
Contractor Framework to compliment the work of the ateb maintenance teams and improve the overall response times to our customers. We implemented a contractor portal to improve the flow of communication between ateb and contractors. We also increased the number of post inspections of contractor works and appointed to a new Maintenance Inspector role to help improve the process by carrying out more pre inspections to help us to fix the repair correctly first time.

Key areas we are planning to work on to improve:

- We will implement a managed store that will ensure value for money and consistency across the ateb Group when purchasing materials.
- We will conclude our Systems
 Improvement Project aimed at
 creating the right process supported
 by the right resources, delivered by
 the right skills and experiences.



Shared spaces

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

In facts and figures.

- 100% of play areas had their weekly, quarterly, and annual safety inspections completed..
- 100% of communal spaces had an annual asbestos inspection where this was required.
- 85% of properties with communal fire alarm and emergency lighting installations had an in-date servicing record.
- 100% of properties that require one had an in-date Fire Risk Assessment including "walk-up" flats.

The ateb Facilities Team ensured the safety of our shared internal and external spaces by carrying out regular inspections of fire alarm systems, playgrounds, passenger lifts, defibrillators and water systems, achieving a 100% target.

Our assessment of the year:

It has been a busy year, whilst ensuring our shared spaces both internal and external are safe, clean and well maintained, we have taken forward a number of new initiatives to improve our service offer including a review of all cleaning specifications in response to customer requests, which in turn led to a retendering exercise that resulted in an overall reduction in our customers service charge for cleaning services and working collaboratively with Pembrokeshire County Council and ateb communities on the introduction of new arrangements for waste collection and recycling.

We also became a member of Pembrokeshire Nature Partnership. Who co-ordinate, promote and record existing and new actions to conserve, promote and enhance nature in the County of Pembrokeshire, including the Pembrokeshire Coast National Park, the inshore waters and seabed around the Pembrokeshire coast to 12 miles offshore, taking account of local and national priorities. This partnership will help us drive forward our ambitions to have more bio-diverse communities.

Key areas we are planning to work on to improve:

- We will pilot a scheme where communities take responsibility for services such as grounds maintenance and cleaning to empower our customers to take care of the communities they live in.
- We will review how we currently deliver and develop a vision for ateb Estate Services so that we deliver estate services our customers want, whilst ensuring that our shared spaces are of a high quality and service charges provide value for money (VFM).

Compliance

All properties are compliant with the required regulations.

In facts (as at year end):	20/21	21/22	22/23	23/24
Gas Certification	100%	99.9%	99.8%	99.5%
Electrical Inspections	99.8%	100%	97.2%	97.8%
Lifting equipment inspections	91.8%	100%	95.1%	92%
Visual asbestos inspections	89.5%	100%	100%	96.4%
Smoke Alarm inspections	100%	99.9%	95.8%	99.2%
Domestic Fire Sprinklers	84.2%	99.1%	98.5%	97.6%

Our assessment of the year:

We continue to prioritise the safety of our customers' homes through our programme of landlord health and safety inspections where these are required. Landlord Health and Safety is now a standard item on the Customer Forum agendas with a member of the compliance team in attendance.

We continued to see high levels of compliance across all ateb homes, however, access issues to some customer homes meant 100% compliance was not achieved.

We managed to bring all homes into a 5-year cycle of electrical installation tests during the year where our customers allowed access.

Key areas we are planning to work on to improve:

We will carry out a review of all Landlord Health and Safety policies, procedures, and processes, to assure our homes are safe, and we are compliant with all legislation and regulation.



Planned Improvements

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

In facts:	19/20	20/21	21/22	22/23	23/24
Kitchens fitted	50	19	25	108	151
Bathrooms fitted	71	16	182	81	70
Windows & doors fitted	149	114	305	65	129
Heating systems replaced	48	12	40	5	105
Boundary replacements	113	110	97	73	0
Homes painted	299	333	389	479	30

Our assessment of the year:

We invested approximately £3m in our homes through our planned works programs during 2023/24 with a significant increase in the number of homes benefiting from new windows, doors and heating systems. A total of 803 homes had planned improvements and customer satisfaction with the standard of works was high.

- 98.5% of customers who responded to our survey told us they were satisfied with the works when they had their kitchen replaced.
- 95.5% of customers who responded to our survey told us they were satisfied with the works when they had their bathroom replaced.

Key areas we are planning to work on to improve:

 We will be completing our review of planned maintenance specifications and programme to ensure they are aligned to the new Welsh Housing Quality Standards (WHQS) 23.



Tenancy Management

We have helped create a great place to live.

In facts:	19/20	20/21	21/22	22/23	23/24
Total anti-social behaviour reports	152	344	171	318	199
Low level nuisance	137	320	156	285	190
Required intervention from ateb	15	18	14	25	3
Required a multi-agency approach	0	6	1	8	6

Our assessment of the year:

We continued to take a supportive rather than legal approach to tenancy and community management issues during the year, resulting in very low reports of tenancy failures, with 1 eviction and 7 abandonments during 2023/24.

We have seen a decrease in the number of reports of anti-social behaviour (ASB) during 2023/24 when compared to the previous year. Most cases reported were for low-level nuisance.

73% of customers who responded on closure of the case, told us they were satisfied with how their ASB complaint had been handled, 24% reported they were neither satisfied nor dissatisfied, whilst only 3% of complainants told us they were dissatisfied.



Community Welfare Project

The project has 3 main objectives.

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

During 2023/24 the Community Welfare Project has delivered the following support to our customers.

- 384 individuals provided with oneto-one digital training and ongoing support to connect with family and friends to access services and improve wellbeing.
- 11 computer clubs and digital training facilitated for older people living in ateb Independent Living Schemes and individuals living in the wider community.
- Delivered 39 food intervention parcels to those in need.

- Provided digital support and training at 27 public events across Pembrokeshire.
- Provided digital support to 15 individuals to complete online Universal Credit claims and ongoing account management support.
- Delivered and managed an IT library of equipment for those with no digital equipment of their own.



Home Energy Advice Project

Our Home Energy Advice Project has supported ateb customers throughout the year and has delivered the following support to our customers.

- Provided energy advice and support to 255 distinct ateb households.
- Supported 29 distinct households to access the ateb energy hardship fund for financial support with a total of £14.3k in financial support provided during the year.

Key areas we are planning to work on to improve:

- We will refocus the Home Energy Project officer's role to ensure that customers are receiving the home energy service they want and need that enhances our wider service offer.
- We will work with the Local Authority to have delegated authority to use the Community Protection Notice (CPN) to help us to effectively respond to ASB complaints.



Independent living

Promoting wellbeing of customers who require additional support.

In facts:	19/20	20/21	21/22	22/23	23/24
Total support hours delivered	2090	2285	2475	2585	2680
Number of older people supported in Independent Living schemes (monthly average)	61.5	74	56	53	62
Number of older people supported in the community (monthly average)	9.8	21	25	19	12
Number of Community Alarms installed	69	44	25	24	14
Number of ateb customers to benefit from minor adaptations to home and total value of investment	Not available	Not available	70 (£16k)	84 (£16K)	103 (£17k)
Total number of Supported Living projects	40	40	41	46	46

Our assessment of the year:

On average 74 older people were provided with housing related support across ateb homes each month during 2023/24.

To promote the independence and wellbeing of customers with additional needs £17k was spent on minor adaptations to the home benefitting 103 individuals. A further £288k was invested using Welsh Government Physical Adaptation Grants for more complex adaptations to a further 51 ateb homes.

We continued to work with partners by providing 46 properties through management and lease agreements for people who needed a home with additional care and/or support available.

Key areas we are planning to work on to improve:

- We will have progressed the upgrade of our community alarm systems in readiness for digital switchover.
- We will review our Independent Living Schemes service offer.





New homes

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

In facts:	19/20	20/21	21/22	22/23	23/24
New homes delivered	101	112	64	59	80
SHG received	£4,170,076	£4,348,233	£6,936,250	£15,539,213	£7,011,513
MBH gift aid recycled from open market sales	£1,066,259	£2,664,085	£1,914,928	£1,466,676	£57,644

Our assessment of the year:

We have continued to progress new sites and build much needed new homes, to endeavour to meet both the Group's new homes aspirations together with that of Welsh Government.

During 2023/24 73 new homes for social rent came into management, increasing the number of homes available in Pembrokeshire to meet housing need. In addition, 7 new shared ownership homes came into management. Overall ateb has delivered 408 new homes in Pembrokeshire in the last 5 years and are aiming to deliver a further 393 new homes across West Wales in the next 5 years.

Key areas we are planning to work on to improve:

 We plan to launch a new Development Strategy that will aim to build on the great work we have done in providing much needed new homes to the people and communities of West Wales in recent years.

West Wales Care & Repair

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



In facts:	19/20	20/21	21/22	22/23	23/24
People helped with rapid response adaptations	1,514	1,284	1,306	1,730	1,565
Home Safety assessments	696	480	579	756	882
Customers supported to maximise income	62	99	131	44	101
Additional customer income raised £	£343k	£497k	£645k	£262k	£550k
Customers satisfied with our service % (rapid response service)	99	98.5	99%	100%	100%
Customers who told us their quality of life had improved % (rapid response service)	96.5	80.5	82%	94%	89%
Customers supported by handy person services - Pembrokeshire	348	146	160	98	54



West Wales Care & Repair

Our assessment of the year:

We continue to see increasing demand for WWCR services across Pembrokeshire and Ceredigion with high levels of customer satisfaction reported with positive outcomes for our customers. WWCR has made a significant contribution to the prevention agenda and facilitating hospital discharge.

There has also been recognition of the contribution made by the Hospital to Healthier Home service in preventing admission to hospital and reducing the length of stay in hospital, winning the West Wales Health and Care Award for Housing with Care.

WWCR secured additional funding totalling of £49k during the year, working in partnership with third sector and local authority partners to deliver new and more of existing services.

A new strategy was agreed in year aimed at how we grow WWCR and the services it offers in the future.

Key areas we are planning to work on to improve:

- We plan to explore and where possible gain professional accreditation for services offered.
- We will implement a new database system to enable more effective monitoring, reporting and case management.



Customer Feedback

Our customer feedback in the year has generally been positive,

	2021/22	2022/23	2023/24
Expressions of Dissatisfaction resolved informally	44	63	93
Formal complaints resolved at stage 1	7	7	17
Formal complaints resolved at stage 2	1	4	2
Formal complaints escalated to Ombudsman / Information Commissioners Officer (ICO)	2	1	0
Disrepair claims (received in year)	4	0	9
Compliments	27	73	45

We have seen an overall increase in the number of complaints received compared to previous years, this follows a period of active promotion of our Customer Feedback Policy. Most complaints were resolved to the satisfaction of the complainant at stage 1. No complaints were escalated to the Public Services Ombudsman.

To better understand what lessons can be learned from our customer feedback, quarterly meetings are now held to review formal complaints received and closed in the preceding period. The meeting is chaired by the Head of Customer and attended by customers and team members from across the organisation. Trends and themes are reviewed, and improvement actions agreed. In reviewing the complaints received during 2023/24 there were no trends or themes identified.

Summary

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





We have made the following evaluation:

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

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

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

The Board has:

- Considered the following key evidence for this standard:
 - Performance Reports
 - Welsh Government Tenant satisfaction survey results

- Bi-annual Customer Feedback Board Report
- Internal Audits



RS4

Tenant empowered approach

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

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

Our ateb Vision sets out our purpose and what our customers should expect of us.

In summary we aim to:

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

Customers should expect us to:

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

Customer Outcome Management

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

Customer engagement

That we improve service delivery through customer experiences.

In facts:	19/20	20/21	21/22	22/23	23/24
Customers engaged	1,615	1,824	1,627	1,990	2,023
Improvement actions identified	56	43	16	9	8
Improvement actions implemented	26	48	34	9	11
Improvement actions ongoing	30	38	28	9	6

Our assessment of the year:

We saw a small increase in the total number of customers engaged during 2023/24 when compared to the previous year. Customers were enabled to get involved in several different ways, both formally and informally regarding issues that mattered to them.

- 1,747 customers responded to surveys during the year. Whilst on average 26 customers attended customer forum, survey planning group and other customer engagement events held throughout the year.
- We continued to identify operational improvement actions through our customer engagement activities, implementing 11 service improvements during the year.
- 64% of our customers told us in the year that they were satisfied with the opportunities available to participate in our decision-making processes, a small increase on the previous year, with 7% telling us they were dissatisfied, a small reduction on the previous year.
- 59% of our customers told us in the year that they were satisfied that ateb gave them a say in how services are managed, an increase on the previous year, with 10% telling us they were dissatisfied, a reduction on the previous year.
- 64% of our customers told us they were satisfied that ateb listened to their views and acted upon them, a small decrease on the previous year, with 16% telling us they were dissatisfied, a small increase on the previous year.

Key areas we are planning to work on to improve:

We will review our customer forum and survey planning groups to ensure our customer engagement groups are aligned to organizational governance arrangements and embed involvement of customers in key decision making.

Equality, Diversity & Inclusion

We co-produced with Board, the ateb team and customers with the support of Tai Pawb, an Equality, Diversity and Inclusion Delivery Plan.

The delivery plan includes actions we will take to meet the commitments we made when signing the Tai Pawb Deeds Not Words Pledge. It includes our commitments to take action to make Wales an anti-racist nation, how we plan to improve our approach to equality, diversity, and inclusion across ateb Group, and the actions we will take to deliver improvements.

The plan was launched in early 2023/24 and a delivery group chaired by a member of the ateb Group Board and made up of customers and ateb team members was established to oversee the delivery of the actions.

The following are just some of the deliverables we delivered on during 2023/24.

- We developed our Housing Management System to ensure protected characteristic data can be recorded, is securely stored and easily reported.
- We developed a relationship map of all key stakeholders who can support Black Asian and Minority Ethnic customers.
- We delivered Hate Crime training to our frontline teams
- We signed up to the Disability Confident Employer Scheme.
- We reviewed and rolled out a new recruitment procedure and processes with the aim of attracting more diverse talent to the ateb teams and Boards to include diversity of our recruitment panels (always involving internal/external customers) and adoption of the "Rooney Rule".



Our purpose states that...

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

Resident and Tenant Associations

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

Customer forum

The Customer Forum met monthly during 2023/24 (with a break for Summer and Christmas), meeting on the same day as ateb Board.

Customer Forum activities during the year included.

- Reviewing ateb policies in advance of Board approval.
- Reviewing ateb proposed rent increase in advance of Board approval.
- Reviewing and commenting on items for approval and discussion at ateb Board meetings.
- Co-producing and approving key customer service documents for example the forum co-produced and approved new customer service standards in 2023/24.

Representatives from Customer Forum have sat on recruitment panels for new ateb team members during the year and been involved in the procurement process for new contractors.

Engage 2 Improve

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

During 2023/24 the e2i group agreed and undertook 3 themed surveys in addition to the Welsh Government STAR survey.

- Equality, Diversity and Inclusion
- Customer engagement
- Cost of rent and service charges

A total of 980 responses were received and 8 operational improvement actions identified, including.

- Research trends and themes from the feedback customer gave on what groups and agencies our customers link up with to promote their wellbeing and advertise to all customers through social media.
- Review the effectiveness of occupancy reviews.
- Identify agencies that currently provide support within our supported living properties and those contracted by local authorities to provide housing related support across our area of operation and share with customers.

11 improvement actions from previous surveys were implemented.

Customer support and training

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



Customer Conferences

We hold customer gatherings annually attended by both customers and members of the ateb team, a total of 46 customers attended the gatherings this year.

The gatherings focussed on 3 key themes.

- The new Welsh Housing Quality Standard.
- ateb purpose and strategic priorities for the next 3 years.
- Decarbonising ateb homes and communities.

The feedback from the gatherings will inform our long-term planning and strategic improvement actions for future years and the implementation of the new Welsh Housing Quality Standards (WHQS).

Following the success of the Cost-of-Living event we held in October 2022 where customers told us about the impact on them of the rising costof-living and where we co-produced ideas and solutions that would ensure ateb was doing all it could to support its customers through this period of economic uncertainty. We arranged a follow up event in November 2023 to review how ateb was doing in its delivery of the Cost of Living and Fuel Poverty Action Plan commitments that was developed from the ideas that were put forward at the event in 2022.

The event was attended by several key partners who were able to provide advice and support to ateb customers on the support available and contribute to a review and refinement of the ateb Cost of Living and Fuel Poverty Action Plan.

Following the event ateb published a refreshed set of Wellbeing Commitments that can be viewed here: https://www.atebgroup.co.uk/wpcontent/uploads/2024/03/Wellbeing-Commitments-November-2023-002. pdf



Community Days / Events

569 customers attended 18 community days and events during 2023/24, a significant increase on the previous year. Meet Your Neighbour events and community activity days were held to empower ateb customers to take greater ownership of their communities and to promote community cohesion. They were also a great opportunity for ateb team members to listen to how our communities could be improved.

Summary

Based on our assessment we believe that customers are actively engaged and empowered, however there is always more that we can do.





We have made the following evaluation:

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

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

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

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

The Board has:

Considered the following key evidence for this standard:

- ateb Vision
- #1 Purpose
- #4 Deliver
- Customer satisfaction feedback
- Bi-annual customer feedback reports
- Equality, Diversity, and Inclusion Reports and Board representation on working group

RS5

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

Affordable Rent Policy

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

Service Charge Procedure

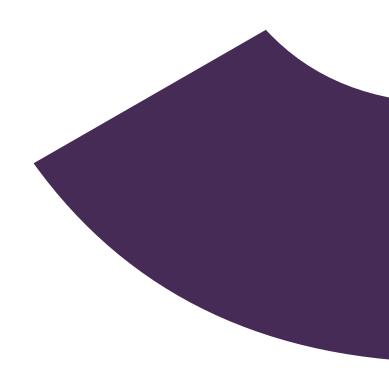
It is intended that service charges will be set at levels that are affordable and in line with the Affordable Rent Setting Policy.

Customer Rent Setting Engagement

Customers were initially consulted on the Affordable Rent Setting policy in late 2019 at the Customer Big Event and were generally supportive of the approach taken to assessing affordability and rent setting on an annual basis. The policy has been subsequently reviewed annually in consultation with customers prior to any amendments being approved by Board.

With the timing changes to rent increase notifications introduced with RWHA and the inflation trigger of 3% being breached, we had to adapt last year's rent consultation process accordingly. We:

- Held a 'cost of living crisis' conference with customers to review what had been achieved in the last 12 months and co-produce our commitments for the coming 12 months.
- 2. Undertook an affordable rent survey with our customers.
- Consulted customers on our annual review of the Affordable Rent Setting policy.



The information gathered through these engagement activities was in addition to the more general affordability questions asked through our last STAR survey which concluded.

- 91% were either 'very/satisfied' or 'neither satisfied nor dissatisfied' that ateb rents provided value for money.
- 82% were either 'very/satisfied' or neither 'satisfied nor dissatisfied' that ateb service charges provided value for money.

From the customer engagement activities, we undertook, it was clear that the link between Housing Benefit and, to a lesser extent Universal Credit (UC), was key to customers being able to afford any rent increase ateb imposed i.e. Where benefits/UC increases did not cover a rent increase then the customer would be proportionally disadvantaged.

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

- 30% Housing Benefit (partial or full)
- 40% Universal Credit
- 30% Self Payer

Therefore 70% of our customers were shielded, partially or in full, from the proposed rent increase of 6.7%.

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

From the feedback from customers there was a recognition that ateb do have increasing costs that will impact on the business's ability to maintain services over the long term. It was also evident that there was a need to make sure that with any rent increase there was support for those customers experiencing the most difficulty.



Affordable Rents Assessment

Our 2024/25 social rents for general needs properties compared favourably to the Living Rent as determined by our Affordable Rent Setting policy.

Property Type (General Needs)	ateb Social Rents 2024/25 (average)	Living Rent 2024/25	Local Housing Allowance (Pembs) 2024/25
Bedsit	£70.05	£98.24	£68.45
1 Bed Flat	£91.83	£109.15	£82.85
1 Bed House / Bungalow	£100.25	£109.15	£82.85
2 Bed Flat	£97.32	£141.90	£105.86
2 Bed House / Bungalow	£111.87	£141.90	£105.86
3 Bed House / Bungalow	£124.01	£174.64	£132.33
4 Bed House / Bungalow	£148.92	£207.39	£161.10
5 Bed House / Bungalow	£161.85	£240.14	£161.10

We believe we have taken positive action in terms of keeping our rents affordable. Over the last 5 years we have applied the following rent increases:

Rent Group	20/21	21/22	22/23	23/24	24/25
Social rents	1.7%	0.5%	3.1%	6.5%	6.7%
Intermediate rents	0%	0%	3.1%	6.5%	6.7%
Welsh Government Max. %	2.7%	1.5%	3.1%	6.5%	6.7%

In years 20/21 and 21/22 we increased our rents by less than that allowed by Welsh Government in recognition of the challenges faced by customers during the pandemic, during the same period intermediate rents were frozen.

From 2022/23 onwards we have increased our rents by the maximum allowed, however we have continued to provide financial and practical support. In 2023/24 a total of £14k was accessed by 59 households to support with energy costs and £82k was accessed by 86 households to support with rent payments.

Summary

We believe our approach to rent setting offers an affordable solution to our existing and future customers, complemented by the additional support offered.



We have made the following evaluation:

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

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

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

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

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

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

The Board has:

- Considered the following key evidence for this standard:
 - ateb Vision
 - #4 Deliver
 - #4 Assure
 - Affordable Rent Setting policy
 - Affordability analysis
 - Customer feedback on rent setting consultation

- Performance reports
- WG Tenant satisfaction survey results
- WG affordability return

■ RS9

The organisation provides high quality accommodation

Accommodation profile

Home type	Numbers
Social Rent	2233
Intermediate Rent	594
Supported Living Bed Spaces	85
Sheltered	235
Shared Ownership	16
Rent 2 Own	4
Extra Care	88



Welsh Housing Quality Standards (WHQS)

Social Housing stock compliance with the WHQS:

Component	% Fully compliant	% Compliant with acceptable fails	% Non- compliant	
Roof and associated components	100%	0%	0%	
Windows	99.6%	0.4%	0%	
External doors	99.6%	0.4%	0%	
Kitchens	80%	20%	0%	
Bathrooms	78.5%	21.5%	0%	
Energy rating SAP 65+	98%	2%	0%	
Central heating system	98%	2%	0%	
Electrical systems	100%	0%	0%	
Mains powered smoke detectors	100%	0%	0%	
Gardens and external storage	90%	10%	0%	

We deliver maintenance programmes to ensure that WHQS is maintained.

Energy rating

Our homes had the following energy rating status at the end of March 2024 (excludes Shared Ownership and Rent 2 Own homes):

SAP Rating	Number of Homes	%
Α	286	9%
В	1,032	32.4%
С	1,556	48.9%
D	280	8.8%
E	23	0.7%
F	6	0.2%
G	0	0%

New Build Programme

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

New Units - Cumulative	24/25	25/26	26/27	27/28	28/29
ateb	99	122	83	66	23
МВН	22	36	54	22	15

Damp and Mould

Regular reporting to Board and monthly progress meetings involving members of the senior leadership team has ensured the importance of addressing reports of damp and mould has remained a priority for ateb. The importance of dealing with reports promptly, whilst treating the customer with dignity, respect and empathy has been a priority during the year, as well as ongoing training for members of the ateb team.

We received a total of 212 reports of damp and mould during 2023/24 and where customers responded on the closure of a case 84% told us that they were satisfied with the outcome and 96% told us that they were treated with dignity, respect and empathy by members of the ateb team and contractors.

There is always more we can do and our focus going forward is to identify longer term solutions for homes that have historically experienced ongoing problems with damp, mould and condensation.

Optimised Retrofit Program (ORP)

In the latter part of 2022/23, we secured £930k in funding from Welsh Government under the Optimised Retrofit Program (ORP). Works progressed well during 2023/24 on the 44 homes that will benefit from external wall installation, improving the energy efficiency of these homes.

An additional £1,095k in funding was secured in 2023/24 to improve the energy efficiency of an additional 40 homes.

It is anticipated that all ORP funded works will be completed by March 2025.





Swansea Bay City Deal - HAPS

We also secured £286k in funding from the Swansea Bay City Deal Homes as Power Stations (HAPS) project in 2023/24. The funding will enable ateb to install solar PV, energy storage batteries and heat pumps at 8 ateb homes during 2024/25.

Fire Safety Capital Grant

ateb secured in the region of £6m Welsh Government Fire Safety Capital Grant towards the end of 2022/23 to address fire safety concerns at our 2 Extra Care schemes. Works started in early 2023 to improve evacuation systems and internal / external compartmentation issues. Work has progressed well during the year with significant praise from the Fire Service with how ateb has approached the improvements. It is anticipated that all works will be completed by late 2025.

Transitional Accommodation Capital Programme (TACP)

We were able to secure up to £529k Welsh Government TACP funding during 2023/24 to bring 8 much-needed homes back into management that did not meet the required lettable standards and were being considered for disposal.

High Quality Homes Assessment

The feedback from our customers regarding their satisfaction with their home is positive with 87% telling us that they were very or fairly satisfied with the quality of their home. The following shows a breakdown of responses to the Welsh Government tenant satisfaction survey undertaken in 2023/24:

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

Response	Number	%
Very satisfied	393	51%
Fairly satisfied	278	36%
Neither	56	7%
Fairly dissatisfied	39	5%
Very dissatisfied	13	1%
Total	766	

The response rate represents 24% of our total homes.

We have long term investment plans to ensure our homes continue to meet the required quality standards. A total investment of £35.7m is currently planned for over the next 5 years.

2,153 properties are charged as security against our debt portfolio. These properties undergo a rigorous independent valuation assessment before deeming the homes suitable for lender collateral.

There are over 1000 properties available for charging.



Summary

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

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

Meeting new Welsh Housing Quality Standards standards will be a challenge in terms of cost and timescales, and we will spend the coming 12 months understanding how we can rise to this challenge in future years.



We have made the following evaluation:

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

Evaluation Check

1. Does the Board know it meets this standard?

The Board has:

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

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

The Board has:

Considered the following key evidence for this standard:

- ateb Vision
- #1 Purpose
- #4 Deliver
- #5 Assure
- Monthly Performance reports
- Stock condition surveys and reporting
- Securitisation survey & valuation
- Customer satisfaction feedback

- Damp and Mould Policy
- Welsh Housing Quality Standards (WHQS). Policy
- WHQS Survey and certification data
- Repairs and Maintenance Policy
- Damp and Mould Improvement Plan
- Damp and Mould Board Reports



Performance Self Evaluation Summary FY 22/23

Nick Hampshire Chief Executive

Against All Odds

It's been a pressurised operational year for our teams, as external issues and volatile operating conditions, especially around resources for skills and contractors, have impacted what we wanted to achieve. It's against this back drop I am glad to be working with the teams I do, they have kept things going when the times have been tough. This is so important to report as the services we provide make a difference to so many, so when it's tough for our customers we must keep the support flowing.

West Wales Care and Repair (WWCR) had another strong year, with additional grant in, they were able to offer more services and this was all achieved with a lot of personal change across the year. Satisfaction remains very high demonstrating the importance of the older person support they provide. Mill Bay Homes had one project on site in Sageston, the pressure was on to release homes for sale to allow a positive end of year outcomes to their accounts. In total 80 homes were sold, with a modest £57k Gift aid receipt for the year. This was achieved in a difficult housing market and with our initial sales values being generally achieved.

ateb let 73 new homes with many more on site and ready in the pipeline, we continued to support Pembrokeshire County Council initiative to end homelessness with many of our new and relets supporting customers to move and aiding the homelessness agenda in the county. Our void periods have gone up over the year which is due to several

reasons, RHWA higher specifications, supply chain shortages and ateb taking advantage of an empty home to undertake critical improvement works that are easier to do in an unoccupied property. We still perform well against others but are challenging ourselves to get the homes across quicker where we can.

Budgeting and benefit advice is a key part of our customer services. We aim to support our customers to make the best of what is available to them and for them to be able to lower the stresses incurred during periods of economic uncertainty. Our teams are here to help and have been successful in maintaining lower than average rent arrears and high levels of collection. Our repairs service has been stretched but satisfaction with the repairs once undertaken, remains high. We are looking at how we can shorten the wait for repairs and increase our fix first time aspiration.

This year saw some fantastic work around decarbonising our homes – this is important as homes that produce less carbon, need less energy to run them. Working with funding from the Welsh Government and Homes As Power Stations, new projects commenced. This was on top of a full planned maintenance programme and the fire safety work, further raising standards in two of our bigger housing complexes.

None of our great customer performance can be achieved without a dedicated team of people and partners supporting our drive to create more, my thanks to the whole ateb Group and contributors for their input across a unpredictable year.

Creating better Living Solutions