



**Date:** 15 October 2014

**Subject:** Performance Reporting (KPIs)

**Report Author:** R2R Resident Inspectors

**Purpose:** To provide findings and recommendations from R2R scrutiny on Performance Reporting (KPIs) Process

## Introduction

The R2R panel decided on the Performance Reporting (KPIs) process as the topic for quarter three's scrutiny activity. This report outlines the key findings from the scrutiny panel and provides a number of recommendations where the R2R resident inspectors feel that the performance reporting process could be improved.

## Methodology Used for Scrutiny

The R2R resident inspectors decided that a desktop review and speaking to residents at the Resident Consultation Roadshows, as well as involving the foyer and supported housing residents would be the best approach for gauging residents' views on the performance reporting process.

The panel selected performance reporting as a scrutiny topic because they wanted to know:

- How Saha is performing against its standards and against other organisations within the sector (Key Performance Indicators – KPIs)
- Have a clearer understanding of how and why Saha collects performance data
- How Saha improves on poor performance (if able to) and maintains good performance (KPIs).

The scrutiny meetings took place via video link at Saha's Head Office in London and Regional Office in Bolton on 15 October 2014, as well as local residents meetings that were held at the Foyers and Supported Housing Services.

In order to develop an informed understanding of the various elements involved in performance reporting the panel assessed and reviewed the following key documents/information:

- How Saha reports back performance to its various customers, i.e. stakeholders and residents
- Compared how Saha reports back on performance to its customers against other organisations, i.e. Housing Associations, Local Authorities and ALMOs
- Reviewed Saha's current KPIs

## Scrutiny Findings

### **Reporting back performance to customers?**

The panel conducted research on how Saha reports back performance to its customers i.e. residents, funders, local authorities and government bodies at various levels:

- Corporate Level – Saha website, annual report, Saha news, KPIs, Financial Statements/annual accounts
- Local Level (services/schemes) – residents meetings, service delivery plans, healthy conversations, scheme inspections

As part of the process, we asked the foyer residents the following key questions regarding performance reporting and their understanding of the process at their service/scheme:

- Do you know how Saha reports its performance back to residents? *There was a mixed response from 3 services.*
- Do you know how to get involved in reviewing performance, i.e. the process, residents meetings, surveys etc? *All 3 services knew how they could get involved in reviewing performance information.*

- Are you informed/told about the outcome of your input, i.e. for example, if you inputted into a service delivery plan do you know if that's been achieved? If so, how is this communicated back to residents? *All 3 services said they were informed about the outcomes of their involvement.*
- Do you want to know this information? *There was mixed feedback on this question as some services wanted feedback, whilst another service said that some of the residents weren't interested.*
- Please answer the overarching question: How well is your Landlord (i.e. Saha) performing? (Based on the above information and discussions with staff). *Mixed comments from performing well, to ok.*

Please see attached appendix B for the foyers and supported housing's response.

### Performance data comparison?

The panel undertook a review of a number of organisations' websites to assess the type of performance data that is available to customers. Below is an example of some of the organisations the panel looked at:

- Housing Association – Home Group Ltd, Aspire Housing, Coast & Country Housing and Crisis
- Local Authorities – East Sussex County Council, Manchester City Council
- Arms Length Management Organisations (ALMOs) – Ascham Homes

### Panel's comments:

The panel liked Coast & Country Housing's performance data in terms of the way it was presented, i.e. KPI data grouped against its local offers, as it was easier to understand.

### Reviewed of Saha's KPIs?

Overall the panel felt that Saha's performance data was adequate for the business reporting element, however they felt from a resident's point of view there was too much corporate information, e.g. staffing, sickness, profile of residents, commercial turnover as a % of turnover, return on assets, which they didn't want to know.

Therefore the panel reviewed the KPIs data table and narrowed it down to 13 key KPIs that they would like Saha to report back to residents on:

Ref	Performance Indicator
2.4	Satisfaction with new tenancy (after 6 months)
2.5	Satisfaction with complaints
2.8	Satisfaction with repairs
2.9	Overall satisfaction (panel wanted this changed to Overall experience)
2.14	Planned move on
2.15	Planned move on resulting in greater independence
2.16	Residents supported into employment
2.17	Inspected schemes at "Good" or "Excellent" standard
3.1	Proportion of responsive repairs completed in target
3.2	Proportion of repairs completed right first time
3.9	Average annual energy efficiency rating
4.1	Current tenants arrears
4.3	Cumulative rent written off

### Assurance Level Rating:

Overall the R2R panel rated the Performance Reporting Process as: **Adequate** with some recommended actions for the Association to implement.

## Recommendations:

Appendix C sets out Saha's Management Feedback on the Performance Reporting Report.

<b>Recommendations:</b>	
1	For the Association to produce two sets of performance data (KPIs) – a corporate and resident version. The performance data (KPIs) should be grouped or in some way presented so that it relates to Saha's local offers.
2	For the Association to publish Saha's performance data against other comparable organisations within the sector.
3	Where Saha is performing low in either performance or satisfaction, can the Association tell residents what it is doing to improve this?
4	To add a key to the performance information informing residents what red and green mean, i.e. definition, as not everyone understands this?
5	Under the move on KPI can Saha explain what positive move on means and what this entails? Also under move on KPI, what client group does this refer to, i.e. GN/Sheltered/Foyers, as this is not clear?
6	In terms of move-on, if these are positive move-ons, can these stories be placed on the Saha website as good news stories/videos?
7	Ensure that all services have relevant performance information at schemes/services.
8	Contents of noticeboards at services/schemes to be kept up to date – as the information on the boards is not always up to date or relevant to the service/scheme.

## R2R Definition on Recommendation Priorities

Assurance level	Definition
<b>SUBSTANTIAL</b>	We feel that the overall service delivery is effectively managed by the organisation and there are robust processes in place.
<b>ADEQUATE</b>	We feel that overall Saha has effective processes in place although there is room for improvement.
<b>LIMITED</b>	We feel that Saha has no effective processes in place and needs to implement recommended changes immediately.
Recommendation Priority	Definition
<b>ESSENTIAL</b>	Essential recommendations for changes to Saha's process to improve service delivery to be implemented immediately.
<b>IMPORTANT</b>	Important recommendations for changes to Saha's process to improve service delivery to be implemented within the next financial year.
<b>HOUSEKEEPING</b>	Housekeeping recommendations show areas where we have highlighted opportunities to implement a good or better practice.

## Performance Reporting – Feedback (Foyers/Supported Housing)

Questions:	Residents Feedback:
Do you know how Saha reports its performance back to residents?	<ul style="list-style-type: none"> <li>• Braintree Foyer – Residents were not aware of how performance was reported back to them, the terms, KPIs etc. were not familiar to them.</li> <li>• Middlesbrough – All said yes and said the newsletter and tenants meetings were the channels for communication</li> <li>• Doncaster Foyer – Residents explained that they felt they were provided with plenty of opportunities to express their input and were absolutely clear on the methods used to report back to residents. Residents spoke about how they received verbal feedback from staff in a short amount of time. All residents at the meeting said they were happy with how they received reports about performance.</li> </ul>
Do you know how to get involved in reviewing our performance i.e. the process, residents meetings, surveys etc?	<ul style="list-style-type: none"> <li>• Braintree Foyer – We discussed the recent service charge survey and the forum of resident meetings as examples of involvement in reviewing performance – residents were aware of these ways of getting involved. They also discussed how they knew how to raise repairs and how they would discuss issues with their Project Worker and staff if they needed to.</li> <li>• Middlesbrough – Yes, meetings surveys and suggestions.</li> <li>• Doncaster Foyer – Residents provided various examples of the different ways in which they could get involved with reviewing performance. They spoke about how they could check the noticeboard for reviews and attend the monthly resident meetings that were held. Residents discussed the surveys that they had completed along with the consultation process, which had provided them with the opportunity to give their input on policy reviews.</li> </ul>
Are you informed/told about the outcome of your input i.e. for example if you inputted into a service delivery plan do you know if that's been achieved, if so how is this communicated back to residents?	<ul style="list-style-type: none"> <li>• Braintree Foyer – Action Points were reviewed at resident meetings, so this was one way of feedback that they were familiar with, however, they were not aware of other ways in which information was communicated back to them.</li> <li>• Middlesbrough – Yes, in minutes, meetings, newsletters etc.</li> <li>• Doncaster Foyer – Residents spoke about how they were always told the outcome of their input by staff speaking to them or being informed by a memo or letter. Some residents</li> </ul>

	<p>suggested a noticeboard being put up in the reception area to display resident involvement feedback.</p>
<p>Do you want to know this information?</p>	<ul style="list-style-type: none"> <li>• Braintree Foyer – Some residents said they would like to know, whilst others were not interested.</li> <li>• Middlesbrough – Yes, good to be updated.</li> <li>• Doncaster Foyer – Residents explained how they always wanted to be told about their input and the outcome of this. Residents said that receiving feedback was an expectation as they had given their time to give their views and opinions; therefore they wanted to hear how their input had had an impact. Residents spoke about how they were provided with feedback when they had given their input towards the grievance form being reviewed.</li> </ul>
<p>Please answer the overarching question: How well is your Landlord (i.e. Saha) performing? (Based on the above information and discussions with staff).</p>	<ul style="list-style-type: none"> <li>• Braintree Foyer – Residents commented that they felt that SAHA as a Landlord was performing well in their experience of the Foyer.</li> <li>• Middlesbrough – said ok</li> <li>• Doncaster Foyer – The residents spoke about how they were always kept up to date with any changes and were provided with information on any consultations taking place. Residents felt that staff did their best and were always telling them what was happening.</li> </ul>

### Saha Management Feedback on Performance Reporting

	<b>Comments Taken From Performance Reporting</b>	<b>Respondent (Name and Job Title)</b>	<b>Management Response To Recommendations</b>	<b>R2R Priority Levels</b>	<b>Target Completion Date</b>
1	For the Association to produce two sets of performance data (KPIs) – a corporate and resident version. The performance data (KPIs) should be grouped or in some way presented so that it relates to Saha's local offers.	Peter Latham – Head of Business Support and Innovation	Agreed, Alpita Patel and Louise Coulson to draft a mock up of the residents performance data (KPIs) against the local offers heading and recirculate to R2R for comments.	Important	March 2015
2	For the Association to publish Saha's performance data against other comparable organisations within the sector.	Peter Latham – Head of Business Support and Innovation	Agreed, Peter Latham to work with R2R and agree suitable comparisons.	Important	March 2015
3	Where Saha is performing low in either performance or satisfaction, can the Association tell residents what it is doing to improve this?	Peter Latham – Head of Business Support and Innovation	Agreed, mechanism to be arranged for this to be published in Saha News from Spring 2015.	Important	March 2015
4	To add a key to the performance information informing residents what red and green mean, i.e. definition, as not everyone understands this?	Puneet Rajput – Director of Corporate Services	Agreed, definitions for all KPIs and red / green performance to be published ahead of SAHA News Spring 2015 edition.	Housekeeping	March 2015
5	Under the move on KPI can Saha explain what positive move on means and what this entails? Also under the move on KPI, what client group does this refer to, i.e. GN/Sheltered/Foyers, as this is not clear?	Vina Mistry – Head of Housing (North)	Agreed, definitions for all KPIs and red / green performance to be published ahead of Saha News Spring 2015 edition.	Housekeeping	March 2015
6	In terms of move-on, if these are positive move-ons, can these stories be placed on	Louise Coulson – Business Support	Louise to encourage residents and staff to share stories through alternative medias on	Housekeeping	Ongoing

	<b>Comments Taken From Performance Reporting</b>	<b>Respondent (Name and Job Title)</b>	<b>Management Response To Recommendations</b>	<b>R2R Priority Levels</b>	<b>Target Completion Date</b>
	the Saha website as good news stories/videos?	Officer (Coms & Involvement)	an on going basis. It is suggested that R2R keep a watching brief regarding the success of this.		
7	Ensure that all services have relevant performance information at schemes/services.	Vina Mistry – Head of Housing (North) and Pat Cross – Head of Housing (South)	Pat Cross and Vina Mistry to investigate if and how this can be achieved and provide a proposal that can be presented to the R2R panel for approval.	Important	April 2015
8	Contents of noticeboards at services/schemes to be kept up to date – as the information on the boards is not always up to date or relevant to the service/scheme.	Vina Mistry – Head of Housing (North) and Pat Cross – Head of Housing (South)	Pat Cross and Vina Mistry to investigate if and how this can be achieved and provide a proposal that can be presented to the R2R panel for approval.	Important	April 2015

**R2R Recommendations Tracking Table  
(December 2014)**

Scrutiny Topic	Number of Recommendations	Number Completed	Number Outstanding		No Further Action Possible
			Still in Target	Past Target Date	
Estate Services	37	29	6	0	2
<b>Complaints</b>	<b>24</b>	<b>24</b>	<b>0</b>	<b>0</b>	<b>0</b>
Voids	24	19	4	1	0
Communication (Residents Meetings)	18	16	2	0	0
Rents & Service Charges	9	8	1	0	0
Repairs and Maintenance	6	1	3	0	2
Performance Reporting (KPIs)	8	0	8	0	0