



BERNESLAI HOMES BOARD

11TH JULY, 2024

1.30 P.M. GATEWAY PLAZA

A G E N D A

		Info/App/Dec
1.	Apologies	
2.	Declarations of Interest	
3.	Customer First Video - Making a Difference	For information
4.	Customer Insight and Engagement Strategy	For Approval
5.	Employee Health & Safety Year End Report 2023/2024	For Approval
6.	Building Safety Compliance Year End Report 2023/2024	For Approval
7.	Berneslai Homes Annual Review 2023/2024	For Approval
8.	Berneslai Homes Standard Programme Year End 2023/2024	For Approval
9.	VFM Annual Report/Efficiencies	For Approval
10.	Resources Papers	
10.1	Board Fact Sheet	For Information
11.	Minutes/Actions from the last Board held 30 th May 2024	For Approval



Report Title	Customer Insight and Engagement Strategy	Confidential	No
Report Author	Dave Fullen, Executive Director of Estates and Customer Services	Report Status	For Approval and Recommendation to BMBC
Report To	Board 11/7/2024	Officer Contact Details	Sarahbarnes@berneslaihomes.co.uk

1. Executive Summary	<p>Purpose of this report</p> <p>This report presents our updated Customer Insight and Engagement Strategy 2024 – 2027 (Appendix A) which has been developed with tenants and sets out the many different and inclusive ways that we hear from our customers and ensure their voices are considered and can influence service design and delivery.</p> <p>Key Points</p> <p>The Customer Insight and Engagement Strategy is fully aligned to our regulatory duties under the Transparency, Influence and Accountability Standard</p> <p>The Customer Insight and Engagement Strategy will enable us to know more about our customers, their experiences, priorities and expectations.</p> <p>An action plan (Appendix B) has been developed to deliver against the commitments in the strategy.</p> <p>Good progress is already being made against actions within this plan including:</p> <ul style="list-style-type: none"> • development of Voicescape software which integrates with our IT system to enhance and increase the capture and analysis of customer feedback;
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	<ul style="list-style-type: none"> • improved information about the opportunities to get involved; and • more regular publishing of information to demonstrate the difference the tenant voice has made.
<p>2. Recommendation/s</p>	<ul style="list-style-type: none"> • Board recommends the Customer Insight and Engagement Strategy 2024-2027 for approval by BMBC Cabinet. • Board endorses the action plan to support the Customer Insight and Engagement Strategy 2024-2027. • Board notes the commitments in the 2024/25 survey action plan. • Board supports the proposal to include a summary of insight and engagement outcomes at each committee with an annual progress report on actions and impact being presented to Board and BMBC Cabinet.

Background

- 3.1 The past few years have seen some of the most significant events in social housing, with the Grenfell fire tragedy in 2017, the tragic death of Awaab Ishak in 2020, and a significant increase in severe maladministration determinations from the Housing Ombudsman highlighting failings in the adequacy of social housing and especially the lack of tenant involvement and empowerment.
- 3.2 The Social Housing (Regulation) Act 2023, and the revised range of Consumer Standards set out a proactive approach to regulating social housing, ensuring standards are met and giving powers for the Regulator of Social Housing to take action against failing landlords.

The Consumer Standards set out landlord responsibilities and ensure that residents:

- are safe in their home;
- know how their landlord is performing;
- have their complaints dealt with promptly;
- are treated with respect;
- have their voice heard by their landlord; and
- have a good quality home and neighbourhood to live in.

[The Transparency, Influence and Accountability Standard](#) is the standard which sets out the specific expectations for landlords to actively support tenants get their voices heard, to know their customers and to respond to their needs and expectations in a transparent and accountable way.

- 3.3 In 2019, following an external review by the Tenant Participation Advisory Service (TPAS), we revised our model for tenant engagement and influence. TPAS completed a planned Smart review in 2021/22 and whilst we received full assessment score and supported our model and positive approach, they recognised that we still needed to widen opportunities to ensure we heard a more diverse voice and made better use of our existing knowledge and information about our customers. More recently we have recognised that whilst we have a good range of formal engagement opportunities, we have become over reliant on small pool of active tenants who give their time and views freely and frequently, but who are increasingly less representative of our wider tenant population.
- 3.4 Recognising that we needed to do things differently, in 2022 we appointed Housing Quality Network (HQN) to explore creative solutions.
- 3.5 We have been working with our active tenants and considered various approaches from across the wider social housing sector to refresh our strategic approach to insight and engagement.

4. Current Position /Issues for Consideration

- 4.1 The Customer Insight and Engagement Strategy 2024/27 (Appendix A) sets out the many different and inclusive ways that we will hear from our customers and ensure their voices are considered and can influence service design and delivery.
- 4.2 This is a key strategy which will require approval by BMBC to ensure that they, as Landlord, are assured that our approach to insight and engagement meets regulatory duties and makes a difference for tenants and Barnsley.
- 4.3 The Customer and Insight and Engagement Strategy, which is fully aligned to our regulatory duties under the [Transparency, Influence and Accountability Standard](#), will enable us to know more about our customers, their experiences, priorities and expectations. It sets out the following.
- What insight and engagement is.
 - How tenants and residents can make their voice heard.
 - How we support them to get their voices heard.
 - How our Board and BMBC will hear the resident voice.
 - How we monitor success and share the difference their voice has made.
- 4.4 An action plan (Appendix B) has been developed to deliver against the commitments in the strategy.

4.5 Good progress is already being made against actions within this plan including the following.

- The development of Voicescape; software which integrates with our IT system to enhance and increase the capture and analysis of customer feedback.
- More regular analysis and publishing of information to demonstrate the difference the tenant voice has made and promotion of the opportunities to get involved.
- Working with new tenants and engaged tenants, a review of the new tenant information pack

5. Customer Voice/Impact

5.1 Delivery against this strategy and action plan will have a positive impact for tenants and residents.

5.2 The Tenant Voice Panel have been involved in the development of the strategy through attendance at 3 meetings with officers

5.3 They have been clear that the publication of the Customer Insight and Engagement Strategy and action plan is the easiest aspect of making the tenants' voice heard and more influential. Their primary requirement is that we actively deliver against the commitments in it and can demonstrate that we have listened to a wide range of tenants and residents and responded to their voice.

6. Risk and Risk Appetite

6.1 The widened opportunities for involvement and insight as set out in this strategy aim to increase our understanding of tenants and residents and in turn reduces the risk of us not getting things right for them or not meeting our regulatory duties.

6.2 The commitment to review the role of the Tenant Voice Panel in Quarter 3 of this year, whilst still holding our Tenant Voice Panel as a key tenant led group, reduces our reliance on this small but very active engaged tenants so reduces the risk of "volunteer burn out" and ensures we hear a wider tenant voice. We will reduce this risk through ongoing support of individual tenant representatives and ongoing publicity of opportunities for tenants to be actively involved.

6.3 The full delivery of the Customer Insight and Engagement Strategy requires the successful implementation of Voicescape and the implementation of a CRM, as this will not just make it easier for us to reach out to tenants, but will enable us to integrate and layer tenant feedback with our management information and service use. Both these projects are in development and any emerging risks will be managed with any governance updates provided.

6.4 There is a risk that with a wider and more regular range of feedback from tenants, that we do not have the capacity to respond effectively or make change which meets the requirements of tenants in the context of financial and sector pressures. This Customer Insight and Engagement Strategy has to be underpinned with increased transparency to ensure that tenants have a better understanding of how we operate and the challenges we face. The action included on the action plan to review and enhance our website will increase transparency. This review has already commenced.

7. Strategic Alignment

7.1 The Customer Insight and Engagement Strategy aligns fully with our Hearing Customers ambition and our company values:

- The Customer and Insight Strategy ensures we put **customers first** by providing a range of ways for them to be heard and to value and consider their feedback in our service design and delivery.
- The Customer Insight and Engagement Strategy ensures we have a **can-do** attitude in listening and learning from our tenants and making it easy for tenants to be involved in a way that suits them.
- The Customer Insight and Engagement Strategy ensures we are **curious** in fully hearing what residents say, experience and expect.

7.2 This Customer Insight and Engagement Strategy is aligned to all aspects of BMBC's 2030 Vision. Listening to and understanding our tenants will ensure that in the contest of social housing: *'we meet the needs of today, without compromising the needs of the future and encourage people to connect to each other as well as to our place.'*

7.3 BMBC's approval of the Customer Insight and Engagement Strategy and ongoing oversight or progress and impact will ensure the delivery of the strategy's aims.

8. Data Privacy

8.1 A DPIA is not needed as a direct result of this strategy. Any DPIAs required for the specific activities included in the strategy are completed when required. The strategy aligns with our duties under GPDR.

9. Consumer Regulatory Standards

Regulatory duties related to hearing and responding to the tenant voice are included in the [Transparency, Influence and Accountability Standard](#). The key aspects relevant to this strategy are that landlords must do the following:

- Use relevant information and data to:
 - a) understand the diverse needs of tenants, including those arising from protected characteristics, language barriers, and additional support needs; and
 - b) assess whether their housing and landlord services deliver fair and equitable outcomes for tenants.
- Give tenants a wide range of meaningful opportunities to influence and scrutinise their landlord's strategies, policies and services.
- Assist tenants who wish to implement tenant-led activities to influence and scrutinise their landlord's strategies, policies and services.
- Provide accessible support that meets the diverse needs of tenants so they can engage with them.
- Work with tenants, to regularly consider ways to improve and tailor their approach to delivering landlord services including tenant engagement. They must implement changes as appropriate to ensure services deliver the intended aims.

10. Other Statutory/Regulatory Compliance

- 10.1 The Customer Insight and Engagement Strategy meets our requirements under the Social Housing Act 2023.
- 10.2 The HOS Complaint Handling Code is a legal duty under the Social Housing Act 2023 and within this code there is a requirement for landlords to learn from complaints.

This Customer Insight and Engagement Strategy sets various ways that we listen to our tenants with learning from complaints being one aspect.

- 10.3 Listening to tenants as set out in this Customer Insight and Engagement Strategy will strengthen our ability to meet our legal duties to keep tenants safe in their homes.

11. Financial

- 11.1 There are no direct financial implications as a result of this report.

12. Human Resources and Equality, Diversity and Inclusion

- 12.1 There are no direct Human Resource impacts as a result of this Customer Insight and Engagement Strategy.

12.2 This Customer Insight and Engagement Strategy aims to understand more about all of our tenants and residents and provide a diverse range of ways to engage and remove barriers.

12.3 The action plan sets out specific actions to improve our partnership working with underrepresented groups across the borough.

13. Sustainability Implications

This policy has no impacts on sustainability.

14. Associated Background Papers

TPAS Smart Review 2022

HQN Insight Review 2022

Knowing our Customers Update Customer Services Committee report (Feb 2024)

15. Appendices

Appendix A - Customer Insight and Engagement Strategy 2024-2027

Appendix B - Action Plan

16. Glossary

None

Berneslai Homes

Customer Insight and Engagement Strategy

2024/2027

DRAFT



FOREWORD FROM COUNCILLOR FRANKLIN, PORTFOLIO HOLDER FOR REGENERATION AND CULTURE

Barnsley Council as landlord welcomes the new customer engagement approach. With changes enacted by the Social Housing Regulation Act 2023 there's an increased emphasis for landlords and managing agents to work with tenants to hear their views and make informed decisions. The Customer Insight and Engagement Strategy 2024/2027 sets out clear opportunities for tenants to get involved and share their views. Consistent engagement with tenants to make sure that they're involved in the shaping and delivery of services is crucial.

We support tenants and Berneslai Homes to make sure tenant views and experiences are used to make informed decisions about the services.

Most of our services are delivered directly to tenants, but we value the feedback and involvement from all our customers. So when we use the word 'tenant' or 'customer' we include leaseholders, applicants and other residents!



BARNSLEY
Metropolitan Borough Council

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INTRODUCTION FROM THE CHAIR OF THE BOARD KEN TAYLOR

Here at Berneslai Homes, we want to make sure that tenants are at the heart of all we do. We recognise that it's everyone's responsibility to listen and hear their voices.

Working on behalf of Barnsley Council, we'll provide a range of opportunities to capture the views of all tenants. Every touch point is an opportunity for tenants to get their voices heard.

Our vision for customer engagement represents our core values, which are putting the "Customer First", having a "Can do attitude" and being "Curious". Living our values will make sure that all our communities are great places to live, with tenants at the heart of all actions, and their views considered when making decisions.

We'll listen and respond to tenants' voices. We'll make sure we develop and deliver high quality, accessible and fair services that meet expectations and needs. We take a realistic approach and have honest conversations when we need to.

Aiming to understand aspirations and needs, we'll draw on lived experience to improve services, empowering tenants to hold us to account and scrutinise performance. This strategy, developed with tenants, sets out how we'll work together to develop, deliver and test the quality of services that we provide.



INFLUENCING FACTORS

This strategy has been developed in the context of the following influencing factors:

Our Values

Every member of staff will embrace our values, making them relevant to their roles:

Customer First

You'll be at the heart of all we do

Can do attitude

We'll make change happen, fix problems and adapt to achieve

Curious

We'll look beyond face value to get things right

This strategy has been influenced in the following ways:

Berneslai Homes Strategic Plan

Our Strategic Plan sets out our objectives and what we want to achieve over the next 10 years. You can find a copy of the [strategic plan on our website](#). Printed copies of the strategic plan are available on request.

Regulator for Social Housing and the Consumer Standards

Barnsley Council are regulated by the Regulator for Social Housing. As an Arms Length Management Organisation, (ALMO), Berneslai Homes deliver services on behalf of Barnsley Council. The Consumer Standards set out clear expectations about how landlords should deliver services. The Transparency, Influence and Accountability standard sets out clear expectations around:

- Fairness and respect
- Diverse needs
- Engagement with tenants
- Information about landlord services
- Performance information
- Complaints

You can find out more about the Regulator for Social Housing by clicking the link below.

www.gov.uk

Housing Ombudsman Complaint Handling Code

Having a legal duty under the Housing Ombudsman Complaint Handling Code, means we not only resolve individual complaints made by tenants, shared owners and leaseholders, but we work with tenants to learn from complaints and develop and deliver a complaint service that is easy to use. You can find out more on our complaints section of the website.

www.berneslaihomes.co.uk/contact-us/make-a-complaint/

AIMS

We want to make sure that tenants can influence services. This strategy sets out our main aims and how we'll work, along with tenants, to achieve them over the next three years.

Alongside the strategy is an action plan, detailing how we'll meet the specific actions.



Our main aims are to:

- Understand more about our tenants, so we can engage in ways that suit them, making sure we're more inclusive and that all tenants have the opportunity to work with us.
- Widen opportunities for tenants to take an active role in co design, tenant scrutiny and service delivery, increasing the impact of the tenant voice.
- Improve the way we communicate with all tenants, in an appropriate and timely manner, using Plain English and a variety of communication channels.
- Support tenants to make sure they have all the tools and skills to effectively scrutinise service, including the provision of training and equipment.
- Increase customer insight, so that we know more about tenants and can tailor services to meet their needs.
- Encourage all tenants to express their views good or bad.
- Improve how we feedback to tenants, ensuring tenants know the difference their involvement has made.

HOW WE'LL MEET THE AIMS

As well as our three year action plan which sets out what we need to do to deliver against this strategy, these are the resources we have to help us.

This includes:

- A dedicated Customer Engagement team
- A budget for engagement
- A Tenant engagement framework and structure in place
- Tenant and staff training package
- Insight software
- Performance indicators in place
- A Board Engagement Champion
- Clear staff roles and responsibilities throughout the organisation

On page 8 we set out how we use customer insight to help deliver against the aims. For a copy of the action plan email communityengagement@berneslaihomes.co.uk.



WHAT IS CUSTOMER INSIGHT?

Customer insight helps us to see the world through the eyes of tenants, leaseholders and prospective tenants. There's no better way to improve our services than stepping into tenants' shoes. It allows us to get a better understanding of how tenants think and feel. By understanding tenants' behaviours, needs, expectations and desires, we can develop and tailor services so that they're cost effective and provide a great experience!

We gather insight in a number of ways, such as feedback through surveys, complaints, social media, online forms, data we hold on our internal systems, focus groups and any engagement.

To sum up, we welcome open and honest conversations as customer insight plays an important role in helping us shape services!



CUSTOMER DEMAND

We use data from our systems to help understand tenant behaviours and demands on our services.

This can include:

- Volume of repairs
- Number of online social interactions
- Complaint data including the reasons for complaints
- Rehousing data such as the number of bids and refusals made
- Contact centre call volumes

We also use this data to monitor performance and highlight any trends.

CUSTOMER FEEDBACK

We run a range of satisfaction surveys, which are mostly triggered by an interaction with us. This helps us to understand customer experience when using our services.

We carry out surveys in a number of ways, for example customers may receive a text message or an email with a link to an online survey, an automated phone call where they're asked to input scores using the keypad or they receive a call from an officer at Berneslai Homes. Tenant feedback is important to us, without it we don't know how well we're doing, or where we've got things wrong. We use this information to help improve the services we and our partners provide.

For a full list of surveys please see our website.



INVOLVEMENT OPPORTUNITIES — HEARING TENANTS

We have lots of opportunities for tenants to get their voices heard, all with different time commitments, so we have something for everyone. Here's what we have on offer:

Tenant Voice Panel – are the check and challenge group. They meet four times a year, to make sure we do what we say we're doing. They monitor our performance reports, meet with officers and receive feedback from tenant representatives on other involvement groups.

Scrutiny Panel – we aim to complete two projects per year, and take a task and finish approach to scrutiny and have a pool of tenants that come together as and when a topic is live. Meeting every two weeks, they take a deep dive into our services, producing an evidence-based report for improvement.

Customer Services Committee – there are two tenants on the Customer Services Committee. They're there to make sure the customer voice is heard within our governance structures. Meetings are held every three months.

Service Excellence Assessment Programme (SEAP) – is a structured way of testing services and giving feedback to influence our future service offer. We do this in a variety of ways including empty property spot checks, grounds maintenance spot checks and mystery shopping.

Tenants and Residents Association (TARAs) – are the eyes and ears on the ground and play a vital role in making sure that our services meet the needs of the community. We ask TARAs for their thoughts on local issues and encourage them to take an active role in wider housing issues. The TARAs also have a social side and have a massive impact on reducing isolation and bringing the community together.

Strategic groups – we've a number of strategic groups with tenant representation. These include: Property Repairs and Improvement Partnership (PRIP), that looks at performance around repairs; Neighbourhood Services that monitors the Service Level Agreement and performance; Damp and Mould Task Group that makes sure the damp and mould action plan is delivered; and a group of tenants who meet with Barnsley Council to discuss and monitor performance.

Tenant board members – we have two tenant board members. They help shape and influence the work that we do and the services that we provide across the borough.

Review and special interest groups – we currently have two review groups: the Service Improvement Panel (SIP), who meet to look at learning from complaints and any complaints trends; and a group who looks at the content of our website.

Equality Fora – we liaise with numerous equality groups including Young Carers, Travellers Site and have strong links with existing Barnsley Equality groups.

Check it Challengers – a great way for tenants to give their views in the comfort of their homes on our policies, letters, documents, procedures and website.

Community Champions – are a network of tenants who have a keen interest in their local community, reporting any problems, sharing their views with us, and helping improve estates.

Focus groups – we use focus groups to gather opinions and host a range of groups when we need to learn from lived experience. A great example is the Fire Safety Residents Panel and the independent living schemes.

Customer Panel – is a great way for customers to view the services we deliver. We hold three panels a year with different topics and publish the feedback on our website. Anyone can attend these meetings.

Local engagement – we hold regular meetings for all tenants and residents that are focused on local community issues and discussing local priorities for action. Every area has an estate walkabout annually. The aim is to identify any estate based issues, giving tenants the opportunity to meet with officers.

Customer surveys – we send out a variety of surveys to collect information on satisfaction levels and general feedback on our services. We also collect data on the Tenant Satisfaction Measures (TSMs), which we do through our Annual Tenant Satisfaction Survey (STAR).



Social media – social media is a great way for us to engage with customers and encourage conversation. We currently use Facebook, Instagram and LinkedIn.

Annual Report – tells customers how we're doing as a business, how well we're performing, and how involvement has helped to change and improve services.

Website – gives all the latest news and information about the services we deliver. Customers can also contact us using our online forms.

Berneslai Bulletin – our monthly e-newsletter gives timely information, latest news and updates.

Berneslai Beacon – this is our quarterly printed newspaper, aimed at tenants that aren't online.



HOW WE CAN SUPPORT CUSTOMERS TO GET INVOLVED

Expenses

We'll reimburse all reasonable out of pocket expenses, including travel, carer and will provide a basic meal for engagement over four hours. We'll also arrange overnight accommodation for those who need it.

Training and development

To thank customers for getting involved, we'll offer a £5 voucher for every hour they spend with us. We'll offer any training they need to make sure they can take a full and active role.

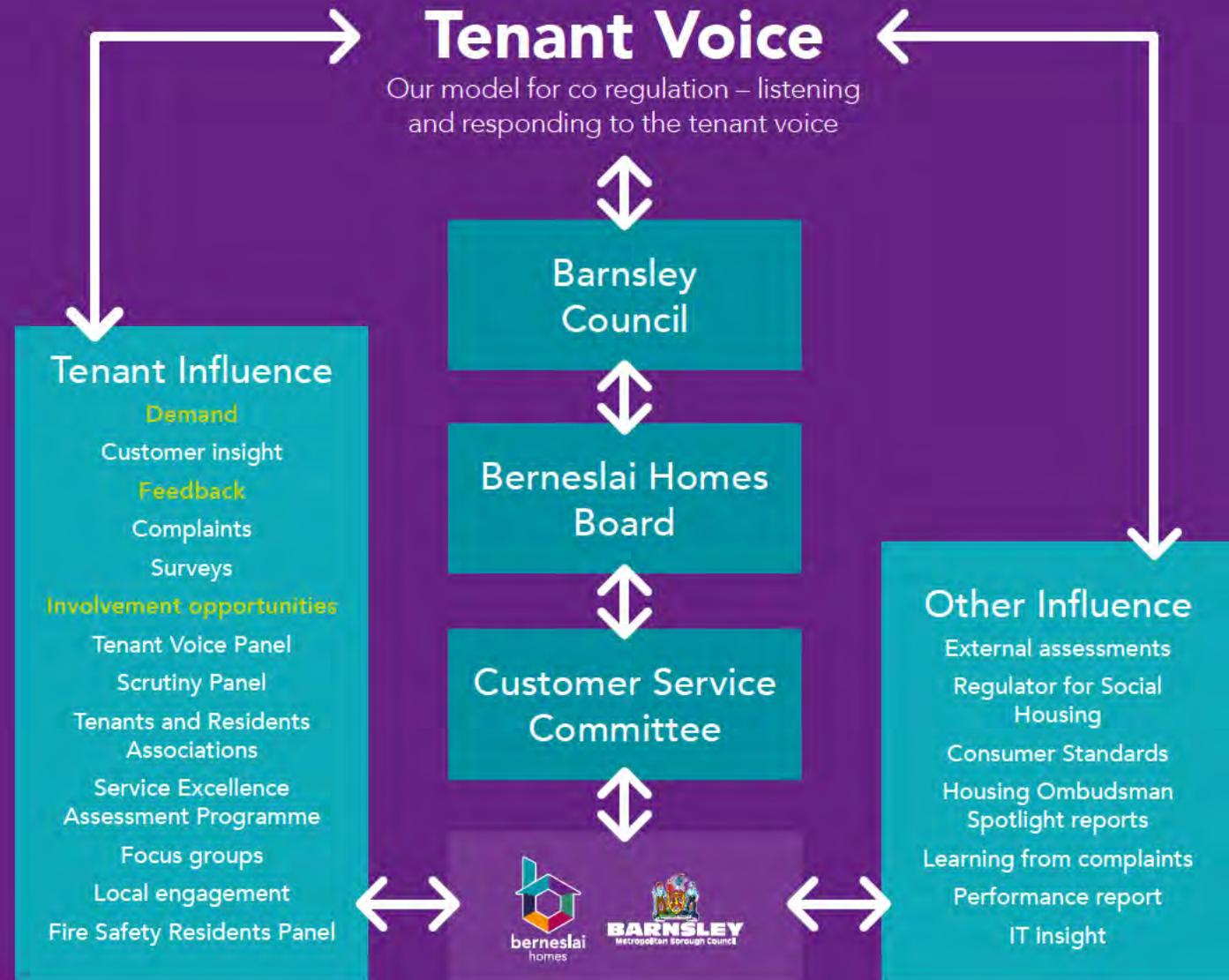
Seeing the person

We'll make any adjustments necessary for customers to be involved in a way that suits them. This includes offering a range of venues, opportunities, equipment, and taking on board their individual needs.



Our model for Co regulation

Co regulation is about more than just compliance, it's about having a two way open and honest conversation to make sure the services delivered are right for both the tenants and landlord. This means working together to agree a collective way forward in the development of services



MEASURING THE DIFFERENCE THE TENANT VOICE MAKES

Here's how we'll demonstrate the difference customer engagement is making:

- We'll publish information about how we're doing in the Annual Report, which is available online
- The Tenant Voice Panel will monitor the actions arising from the action plan to make sure we're meeting the aims
- We'll publish all survey results, along with a summary of any service improvements, an engagement round up and the difference the customer voice has made on our website
- We will complete an annual review of performance against the strategy and include a summary in the Annual Report
- We'll publish an annual self assessment of the engagement and insight action plan
- We'll provide assurance to Barnsley Council by producing an annual report on the difference engagement is making



We'll provide assurance...

To tenants by:

- Our website
- Yearly annual review
- The Annual Report

The Board by:

- Customer Services Committee, as a regular agenda item

The Council by:

- Quarterly meetings with tenants
- The Annual Report
- A summary of the tenant voice activity

SUCCESS MEASURES

To know how effective our engagement is we will:

- Have an annual review with involved tenants to gather and measure their satisfaction levels
- By 2026 we'll have completed all the actions on the Action Plan
- We will see an increase in satisfaction in 2023/2024 for the Tenant Satisfaction measures, (TSMs), in line with our peer groups.
 - TP06 Satisfaction that landlords listen to tenants and act upon them
 - TP07 Satisfaction that landlords keep tenants informed about things that matter to them
 - TP08 Agreement that landlords treat tenants fairly and with respect
- Monitor the indirect success measures including an increase in satisfaction and reduction in complaints
- Sign up 10 tenants in year one to our Check It Challengers initiative, increasing our pool of involved tenants
- Work with the Tenant Scrutiny Panel to complete and publish two scrutiny projects annually
- Have increased tenant engagement by 10% in 2025
- Clearly demonstrate the difference insight and engagement has made for tenants through effective publicity
- See positive feedback from staff about the difference tenant feedback has made for them or their project



WHO DO I CONTACT FOR MORE INFORMATION?



Contact us

For more information about the Customer Insight and Engagement Strategy or to get involved, please:

Email: communityengagement@berneslaihomes.co.uk

Write to: Berneslai Homes, PO Box 627, Barnsley, S70 9FZ

Visit us at:   BerneslaiHomes  www.berneslaihomes.co.uk



www.berneslaihomes.co.uk

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April 2024

What we'll do	How we'll do it	Benefits to tenants	Time frame	Current Position
Develop and launch "Check it Challengers"	A way for tenants to give their views at a time and place that suits them, via email and by post. We'll have a network of tenants that we can communicate with when we have a policy, letter or procedure that needs updating. Or a section of the website that requires tenant views.	It's not a regular time commitment, it's flexible and can be done at home. It's a way for tenants to give views at a time that suits them and on a topic that interests them.	Qtr 2 2024/25	May 24 <ul style="list-style-type: none"> ✓ 7 Members recruited. ✓ Launch event in planning for July 24
Develop a Tenant Communication group	The group will work with tenants to co design our publications and campaigns. The insight from the "Check it Challengers" will feed into the group.	Officers will be accountable for outgoing correspondence. Tenants will cast a tenant's eye over any correspondence or campaigns we're developing to ensure they are tenant friendly and right for tenants.	Qtr 3 2024/25	
Hold a Tenant Conference	Working with our involved tenants we'll plan and deliver a Tenants Conference.	Tenants will have the opportunity to help set the agenda and to network with like minded tenants from across the borough.	Qtr 3/4 2024/25	May 24 <ul style="list-style-type: none"> ✓ Venue agreed ✓ Discussions with TVP re format ✓ Discussions with St Leger/Rotherfed re their conference. ✓ Defer to after Inspection to co-create our action plan

What we'll do	How we'll do it	Benefits to tenants	Time frame	Current Position
Recruit and develop Local Customer Champions	Working with the Neighbourhood teams, we'll recruit a pool of tenants that will be our eyes and ears on the ground, helping us develop our local community action plans, reporting any estate issues and being a point of contact with officers.	Tenants will be a direct point of contact for Berneslai Homes, offering views on local issues. It's a great way to get involved without a regular time commitment	Qtr 3 2024/25	
Develop local neighbourhood action plans	Working with tenants, residents and Neighbourhood teams, we'll use the insight gathered from local engagement events and other opportunities to help formulate local action plans.	Tenants will have bespoke engagement models that fit their local community, encouraging local involvement, attracting a wider tenants voice.	Ongoing 2024/25	May 24 Commenced
Trial four Estate Action days	We'll take a whole area approach and hold intense tenant engagement events at community level in four estates.	Tenants will have a dedicated time for community action in an area, with the opportunity to work with officers, identifying and developing actions for improvement, all of which will feed into the area action plans.	Ongoing 2024/25	May 24 Estate Action Day held Elsecar on 23 rd May Estate Action Day planned 16 th July Summer Lane
Re-engage with the council's Equality fora	We'll arrange a one off meeting with the Equality Fora	A louder, stronger and diverse influential voice.	Qtr 2 2024/25	
Review the role of the TVP	We'll work with involved tenants to review the TVP role	Reduce reliance on existing TVP members and widen involvement.	Qtr 3 2024/25	

What we'll do	How we'll do it	Benefits to tenants	Time frame	Current Position
Continue engagement with the Traveller community at Smithies	We're working with the tenants on the Travellers site, improving the facility and gathering views on the services they receive.		Ongoing 2024/25	May 24 ✓ Consultation event held ✓ Scoping of project commenced
Hold engagement activity with care leavers	Work with care leavers and BMBC Leaving Care team to understand more about care leavers and develop a bespoke rehousing offer to support the newly agreed Care Leaver SLA	Better service for care leavers with better understanding and support from Berneslai Homes. Improved tenancy sustainment	Qtr 3 2024/25	May 24 ✓ Leaving Care Protocol Agreed
Implement Voicescape software to gather more insight and roll out the reviewed range of transactional surveys	Complete the set up of Voicescape and launch the reviewed range of surveys aligned to our 24/25 survey plan.	By increasing feedback in a timely manner, we can identify service improvements at the earliest opportunity and provide a better experience for tenants.	Ongoing 2024/25	May 24 Surveys reviewed Platform in development
Engage with new tenants to develop our New Tenant Pack	Reach out to new tenants and hold a consultation event	Better service for new tenants using lived experience	Qtr 1 2024/25	June 24 Event completed Pack in design
We'll continue with our new Employee Supported Volunteering programme "Can do crew"	Continue to identify community projects needing support and supply employee volunteers.	Positive delivery of community projects. Strengthened connections with Berneslai Homes.	Ongoing 2024/25	May 24 Completed the Autism Allotment project June 24 – Commenced Saville Court ILS garden
Develop automated tenant feedback survey on our website	We'll work with Comms Team and develop a pop up web survey.	To improve customer experience when accessing our website.	Qtr 4 2024/25	
Review the success of the printed Berneslai Beacon newsletter	We'll gather tenant views on the publication and assess its future	To improve communications for customers not online	Qtr 4 2024/25	

What we'll do	How we'll do it	Benefits to tenants	Time frame	Current Position
Assess satisfaction levels for involved tenants	We'll gather feedback to ensure we are supporting and engaging involved tenants	To adapt involvement opportunities and support	Qtr 1 2024/25	
Complete scrutiny training for tenants and staff and develop 24/25 scrutiny plan	We'll source and arrange training	Increase confidence of tenant scrutineers and increase scrutiny projects	Qtr 1 2024/25	TPAS Completed training Jun 24 Plan to be revised by July 24
Run tenant engagement training for key staff	We'll source and arrange training	Increase staff awareness and skill to engage more effectively	Qtr 2 2024/25	Completed Jun 24
Complete training needs analysis for all involved tenants	To discuss training needs of involved tenants	To support tenants to be confidently involved	Qtr 2 2024/25	To commence July 24
Review TSM, feedback and involvement section of website	We'll work with tenants to enhance content and transparency. Focussing on outcomes for tenants	To increase transparency for tenants and understanding of how we're performing	Qtr 2 2024/25	May 24 ✓ TSM section developed ✓ Complaints section developed
Develop an engagement plan for 2025/26	Work with tenants and service leads to develop a calendar of engagement activities for 2025/26	Wider opportunities published and co-ordinated	Qtr4 2024/25	
Review Terms of Reference and tenant membership of all key meetings	Work with tenants and service leads to review TOR and refresh membership	Ensure wide range of tenants have the opportunity to influence	Qtr 4 2024/25	
Develop the self-serve portal and connect with customers to update personal details and preferences	We'll amend our IT system and publicise the online portal for tenants	This will enable us to have the right contact details, personal information and preferences so we can reach out more to tenants, and keep them informed and up to date on things that matter to them	Year 2 TBA	Dependent upon the CRM implementation

What we'll do	How we'll do it	Benefits to tenants	Time frame	Current Position
Deliver our Knowing our Customers project	Review what data systems can help us to achieve this.	To provide a service adapted to meet customer needs. To greater depth into customers feelings, attitudes and behaviours	Year 2 TBA	Dependent upon the CRM implementation
Review and evaluate the changes to our engagement strategy	In year two we will review the impact of the changes made to our engagement model and strategy.	We'll conduct a joint review, working together to ensure the model and delivery under the new strategy is fit for purpose, maximising the tenant voice. Future actions to be amended.	Qtr 2 2025/26	
Explore the feasibility of an online tenants' engagement hub	We'll work with tenants and landlords to complete a cost and benefit analysis of the provision of an engagement hub	An opportunity for tenants to come together with other like minded tenants to discuss and debate issues affecting them and the social housing	Qtr 1 2025/26	
Review the tenant training programme	We'll review our tenant training offer, ensuring it is aligned to the Customer Engagement and Insight Strategy and the needs of our involved tenants.	Tenants will have the opportunity to access training to boost knowledge so they can work with us in partnership developing excellent services	Qtr 1 2025/26	
Review the Estate Action Days Trial	We'll review the effectiveness of the trial Estate Action days and if successful, will role out into other localities, taking an area-based approach.	Enhanced targeted engagement at a local level	Qtr 1 2025/26	
Explore integrated feedback surveys attached to our online services e.g. e forms, housing online	To work with our internal IT team to explore options for integrated surveys	To improve tenant experience when using our online services	Qtr 2 2025/26	

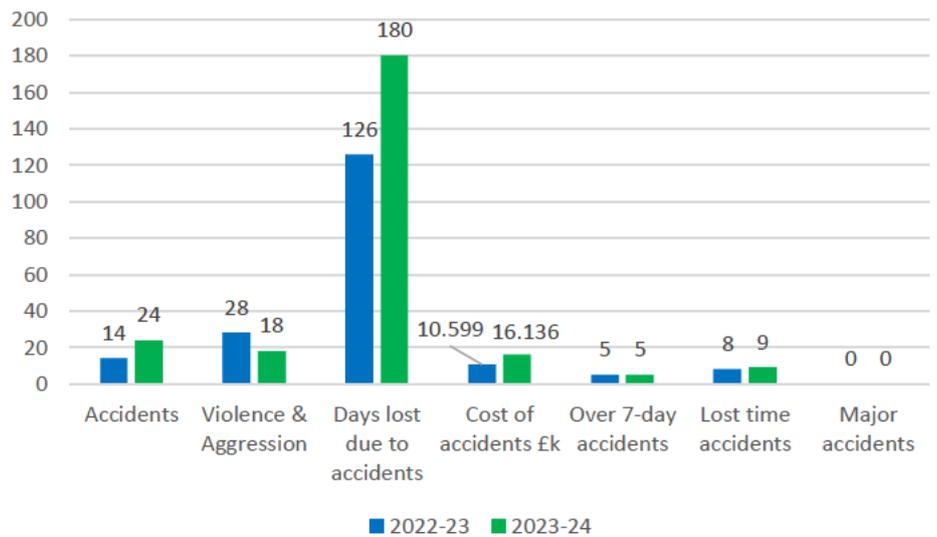
What we'll do	How we'll do it	Benefits to tenants	Time frame	Current Position
Develop a year 2 and year 3 survey plan	To evaluate the impact of customer insights that have been carried out during 24/25 and which methods prove the most effective in supporting changes	To ensure customer insight is the most effective in supporting changes and increasing a better experience for tenants	Qtr 4 2024/25 Qtr 4 2025/26	



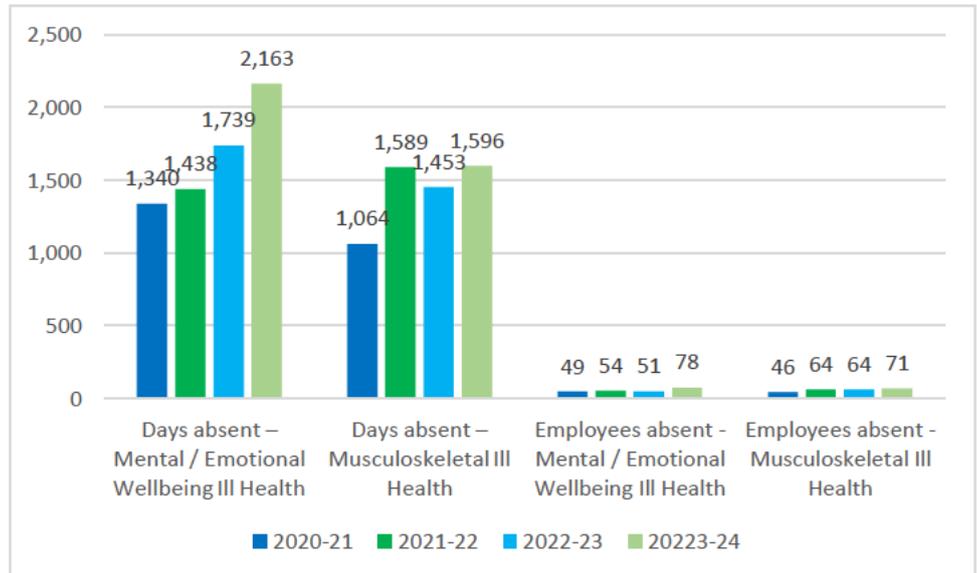
Creating great homes and communities
with the people of Barnsley

Report Title	Employee Health and Safety Year End Report 2023/2024	Confidential	No
Report Author	Chief Executive	Report Status	For Approval
Report To	Board 11/7/2024	Officer Contact Details	clairedenson@berneslaihomes.co.uk

1. Executive Summary	<p>1.1 This report is to inform Board members of the performance for 2023-24, with regards to Employee Health and Safety in Berneslai Homes.</p> <p>1.2 The report presents a complete overview of the year; comparing annual data to identify and question trends, to ensure a robust monitoring regime:</p> <ul style="list-style-type: none"> • Health and Safety Inspections and Audits continue to take place and feedback positive results. • The health and safety Policy remains dynamic and useful. It has been reviewed in line with this report to ensure it is fit for purpose and compliant with current Health and Safety legislation. No notable changes were made. (Appendix A) • The health and safety Management Groups meet bi-monthly and quarterly and they continue to monitor employee health and Safety including reviewing policies and procedures. <p>1.3 Key points from the 2023-24 performance indicators are identified in the table below:</p>
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1.4 Key points from the 2023-24 ill health performance indicators are identified in the table below:



1.5 An annual programme of review is undertaken for all health and safety documents. The actions and targets for 2024-25 are outlined below. These are monitored by the Health and Safety lead as part of their annual review plan:

Action	Target
Lone working survey	Nov-24
Gas explosion simulation session (Emergency planning testing)	Dec-24
Full review of our Resilience and Continuity Plan – Annual Review	Dec-24
Annual review of Health and Safety Policy	Jul-25
Occupation Group Risk Assessments – Annual Review	Jun-25
Health and Safety Management procedures – Annual Review	Jul-25
Task Based Risk Assessments and associated safe systems of work – Annual Review	Jul-25

2. Recommendations	<p>Board are requested to:</p> <ol style="list-style-type: none"> I. Approve that they consider the performance of the health and safety systems and procedures and agreed actions to be in line with expectations. And be assured that we have robust mechanisms in place to manage those systems. II. Approve and sign the refreshed 2024-2026 Health and Safety Policy. III. Approve the areas of further development and monitoring identified at Section 10.
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3. Background

- 3.1 Effective health and safety management enables the Company to meet its legal, moral and economic obligations.
- 3.2 In order for Berneslai Homes to monitor and measure employee health and safety performance and prioritise areas of health and safety risk, an annual health and safety review is performed by the Risk and Governance Manager, utilising data that is monitored quarterly by EMT and by liaising with health and safety leads throughout the company.
- 3.3 Quarterly Health and Safety updates to EMT examine the detail of employee health and safety performance, whilst the annual performance report presents a complete overview of the year; comparing annual data to identify and question trends to ensure a robust monitoring regime.

Current Position /Issues for Consideration

4. Health and Safety Inspections and Audits

- 4.1 The BMBC Health, Safety and Emergency Resilience Service provides the statutory 'Competent Person' service that imparts comprehensive health and safety advice and assistance to Berneslai Homes through a Service Level Agreement.
- 4.2 As part of this service, BMBC undertakes two yearly audits of the management of health and safety, which requires managers to assess their compliance with health and safety issues. During 2023-24, the following key services were audited:
 - Corporate Services – 100%
 - Asset Management – 98%
 - Repairs, Maintenance and Building Safety – 100%
 - Estate Services – 100%

- 4.3 The two-yearly Management of Health and Safety questionnaires were undertaken by managers in June 2024. The review raised no areas of concern and a separate action plan for ongoing developments will be monitored by EMT throughout 24-25.
- 4.4 Berneslai Homes works in collaboration with Barnsley Council as part of our Resilience and Continuity arrangements. We also have our own corporate Resilience and Continuity Plans, which detail critical services provided to our customers, these are reviewed at least annually. The plans continue to provide assurance that we have appropriate mitigations in place to minimise any impact to residents in the event of a major incident and ensuring that appropriate support is in place. The plans have continued to evolve throughout 2023-24 in continuing to provide essential and critical services to customers throughout incidents.
- 4.5 At least two emergency planning sessions are scheduled in each year. Sessions held throughout 2023-24, include: a cyber security simulation, based around the potential loss of IT; and training sessions focused on roles and responsibilities and adverse weather. Real incidents have also tested our resilience arrangements over the last 12 months.

Construction Site Inspections

- 4.6 Health and safety inspections are carried out on a regular basis by the Construction Services Health and Safety Manager, Trade Union representatives and Site Operations Managers. The BMBC Health and Safety Service attend on an ad-hoc basis. Overall standards are excellent with only minor recommendations being made. Site Operations Managers also carry out daily observations and complete weekly inspection sheets where required.
- 4.7 Regular health and safety updates are provided to all staff along with site safety being a standard item on craft toolbox talks
- 4.8 Managers review contractor risk assessments and safe systems of work prior to commencement of the contract; these are retained in the health and safety file on site where applicable.

5. Health and Safety Policy and Guidance

- 5.1 Berneslai Homes' Corporate Employee Health and Safety Policy 2024-26 has been reviewed in line with this report to ensure it is fit for purpose and compliant with current Health and Safety legislation. No notable changes were made. The Policy sets a clear direction for the organisation to follow, details responsibilities and provides a framework for continuous improvement. Board are asked to review, approve and sign the Policy (**Appendix A**).

- 5.2 The Health and Safety Management Procedures are reviewed annually by the BH Health and Safety leads and as required to ensure they are in line with current procedure. These are available for staff on the corporate intranet.
- 5.3 The Occupation Group risk assessments, which assess the risks for each job role, task-based risk assessments and associated safe systems are reviewed annually by managers and as required. These are available for staff on the corporate intranet.
- 5.4 Lone working policies and procedures are in place and regularly monitored and updated. A lone worker device is provided to frontline lone workers, enabling staff's whereabouts to be available to provide assistance in an emergency.

6. Health and Safety Groups

- 6.1 Berneslai Homes operates two Health and Safety Management Groups. The Construction Services group meets on a bi-monthly basis and the Housing Management group on a quarterly basis to monitor progress and discuss any new issues. The Groups comprise of staff representation from a cross section of the company, specialist officers, Trade Union representatives and a member of EMT. The Construction Services Health and Safety Manager and the Risk and Governance Manager attend both meetings.
- 6.2 Health and safety is a standard agenda item on the bi-monthly Trade Union Liaison meetings.

7. Health and Safety Information, Instruction and Training

- 7.1 Health and safety is a standard item within the Team Brief and therefore discussed at all team meetings, Toolbox Talks, and featured in Key Messages as required to ensure this is refreshed and embedded across the company.
- 7.2 Health and Safety is a compulsory induction training module for all new staff, both face-to-face and eLearning. Health and Safety competency is also prompted as part of the PDR Process. Refresher training is undertaken, such as a 3-yearly refresher requirement for IOSH Managing Safely.
- 7.4 Berneslai Homes' intranet site contains a section [dedicated to health and safety](#), which includes corporate policies and procedures, along with risk assessments, useful advice and guidance.
- 7.5 All managers attend the IOSH accredited Managing Safely or equivalent Site Management Safety Training Scheme course and are required to attend refreshers.

8. Health and Wellbeing

- 8.1 Berneslai Homes has a proactive approach to the health and wellbeing of its employees, and this is detailed within the Health and Wellbeing Strategy. The Strategy was refreshed last year following the outcomes of our BeWell@Work Health and Wellbeing employee survey and subsequent Gold award. The aim of the Strategy is to work with staff to integrate health and wellbeing into day-to-day activities, to create a positive and healthy working environment, and to show a commitment to health and wellbeing by linking this to our three C's values. Through the Strategy we provide a framework where we take a proactive and engaging approach to enhancing the health and wellbeing of our staff, focusing on four key wellbeing themes – physical, mental, social and financial. A further survey has been undertaken in May 2024, the outcomes of which will look to inform the Year 2 actions of our strategy.
- 8.2 A health and wellbeing culture is embedded across the company that is facilitated by a number of policies, wellbeing initiatives and campaigns, employee support mechanisms and joint working. The staff online Wellbeing Hub and weekly Berneslai Bitesize messages ensure these are communicated effectively. The [Wellbeing Hub](#) is full of helpful resources and support for employee health and wellbeing, including our offer to staff, ideas and actions based on the five ways to wellbeing, and guidance for managers. We regularly run programmes of events and awareness activities during national campaigns, most recently with Mental Health Awareness Week.
- 8.3 Our Wellbeing Champions are volunteers offering colleagues extra support and someone to talk to. They are all trained as mental health first aiders and offer a first point of contact if staff recognise that they're struggling. They will listen in confidence and can signpost to a wide range of local support. We equip our Champions with a support and signpost toolkit that refreshed through various training opportunities, for example Gambling Awareness. Local support services also attend the Wellbeing Champions quarterly network meeting where possible, most recently Mental Health Matters.
- 8.4 We provide engage counselling and physiotherapy services, that any member of staff can be referred to.
- 8.5 The Occupational Health Service, provided by the NHS, is managed through a contract specification and performance monitored via quarterly contract review meetings.

9. Health and Safety Performance

- 9.1 Berneslai Homes record and monitor all accidents and incidents, which are part of a wider group of performance indicators.
- 9.2 The key points from the 2023-24 performance indicators (**Appendix B**) are:

9.2.1 Decreases (or no change):

	Major accidents	Over 7-day accidents	Over 3-day accidents	Violence and Aggression (reports of)	Employees absent rate - Musculoskeletal Ill Health
2021-22	0	3	0	16	137
2022-23	0	5	2	28	151
2023-24	0	5	2	18	142

9.2.2 Increases:

	Accidents (reports of)	Days lost due to accidents	Days Absent - Musculoskeletal Ill Health	Days absent -Mental / Emotional Wellbeing Ill Health	Employees absent - Musculoskeletal Ill Health	Employees absent - Mental / Emotional Wellbeing Ill Health	Employees absent rate – Mental / Emotional Ill Health
2021-22	16	124 (£9,655)	1,589	1,438	64	54	104
2022-23	14	126 (£10,599)	1,453	1,739	64	51	120
2023-24	24	180 (£16,136)	1,596	2,163	71	78	153

9.3 Accidents

9.3.1 23 out of the 24 reported accidents and all lost time accidents are attributed to Construction Services, which is considered a high risk area by the HSE due to the construction industry being exposed to greater risks. There was a notable spike of accidents and related absence in Q4, which attributed to the notable increase from the year before. All accidents were investigated and there were no concerning patterns to highlight with regards to the causes of accidents. Individual causes of accidents and related absences are monitored quarterly by EMT.

9.3.2 The Health and Safety Executive continue to report that the UK construction industry remains the second highest workplace injury rate of all industries, with the Agriculture, Forestry and Fishing industry being highest.

9.4 Violence and Aggression

9.4.1 The number of incidents reported have reduced from 28 to 18. Each incident has been analysed in more detail as part of the quarterly Employee Health and Safety reporting to EMT. EMT consider the actions taken as a result of the report to ensure that all incidents are being dealt with appropriately.



9.4.2 Our approach to safeguarding our employees' safety is always paramount and our continual message to staff to report any incidents of violence and aggression are reflected in the figures reported. We work with our customers to reinforce the message that violence or aggression in any form will not be tolerated and take appropriate action to address this. We also consider the needs of the customer and our staff are trained to enact the Vulnerability Protocol as required.

9.4.3 We ensure that appropriate support is available to staff when dealing with reports of violence and aggression as part of our Health and Wellbeing approach. As a preventative measure, training is given to frontline staff to minimise the number of and reduce the impact of these types of incidents occurring, such as conflict resolution, complaint handling, and customer services training.

9.4.4 During 2024-25, a 'personal safety' survey to all staff will identify any best practice and enable ongoing developments as required.

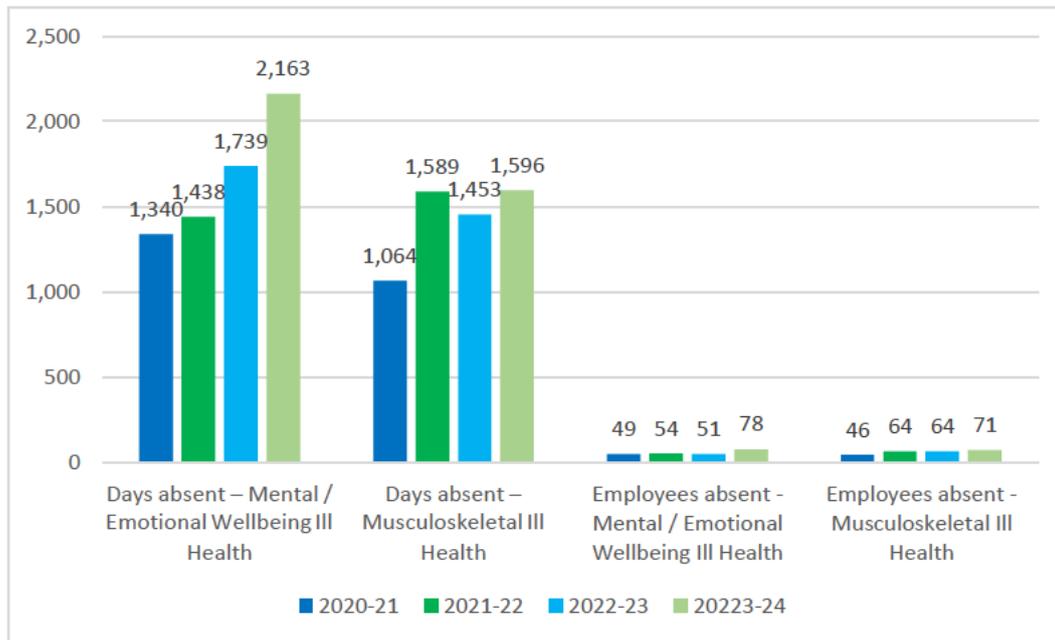
9.5 Assessing Risk

9.5.1 Berneslai Homes' accident recording form asks managers "had a risk assessment been carried out for the activity undertaken prior to the accident?" and "has a risk assessment been reviewed/developed for the activity undertaken after the accident?" The responses provided by managers show that a risk assessment had been undertaken for the work activity in 100% of incidents, with 100% of risk assessments review post-accident. This is a continuation from the previous years due to ongoing monitoring and communication in this area.

9.6 Ill Health Monitoring

9.6.1 As with accidents and incidents, the collation of ill health statistics can assist in improving health and wellbeing within an organisation. The areas that fall under emotional/wellbeing can be triggered by both work and personal/home

circumstances and our procedures look to manage both aspects to help people develop coping strategies.



- 9.6.2 With regards to employees being absent from work due to mental ill health, there is an upward trend of absence in line with HSE reporting for the UK. As a Mindful Employer, we support employees with mental illnesses. Our aim is to reduce the stigma of mental ill health, enable managers to spot the signs early and take immediate action and employees feel confident in reporting mental ill health.
- 9.6.3 With regards to employees being absent due to musculoskeletal ill health, the absence rate is lower than the previous year due to a 9% increase in the number of employees. Ongoing efforts to support staff through musculoskeletal illness and injuries include:
- Provision of a physiotherapy service.
 - Effective regular welfare review meetings which provides a forum for managers and employees to agree a return-to-work plan, i.e. reasonable adjustments such as modified duties and phased return.
 - Safe working practices training.
- 9.6.4 Nationally, the numbers of people affected by ill health greatly outweigh those adversely affected by accidents, which reiterates the need to fully support employees throughout their ill health and invest in mechanisms to expedite their return to work for both the benefit of the employer and employee. During 2023/24, there was a 32% increase in referrals to counselling and a 9% increase in referrals to the Physio.
- 9.6.5 Berneslai Homes' pro-active and continued monitoring of employee welfare identifies issues early to the benefit of the employee and the company, for example return to work interviews and a greater utilisation of the Occupational Health Service. There has been a continued and prevalent use of the Occupational Health Service. In general, non-attendance of appointments continues to stay low due to close monitoring and effective action.

10. Actions for 2024-25

10.1 As discussed throughout the report, an annual programme of review is required to ensure that all policies and procedures are in line with regulation, best practice and that further developments can be identified. In addition to those reviews, work will continue in relation to health campaigns, training, inspections and audits. These are monitored by the Health and Safety lead as part of their annual review plan:

10.2

Action	Target
Lone working survey	Nov-24
Gas explosion simulation session (Emergency planning testing)	Dec-24
Full review of our Resilience and Continuity Plan – Annual Review	Dec-24
Annual review of Health and Safety Policy	Jul-25
Occupation Group Risk Assessments – Annual Review	Jun-25
Health and Safety Management procedures – Annual Review	Jul-25
Task Based Risk Assessments and associated safe systems of work – Annual Review	Jul-25

11. Customer Voice/Impact

11.1 The aim of the Employee Health and Safety performance monitoring is to scrutinise employee health and safety and therefore customer views are not sought for this report.

11.2 The impact of a positive health and safety culture, will ensure we provide quality of services to tenants, ensuring we work safely in tenant's homes.

12. Risk and Risk Appetite

12.1 Strategic Risk Appetite – Risk Adverse: We aim to comply with all relevant legislation and have zero tolerance for regulatory compliance issues. We give high priority to internal audit recommendations and take immediate action to resolve concerns. We have zero tolerance for failure to meet deadlines from regulators.

12.2 There are significant risks if the organisation does not have effective measures in place for managing Health and Safety. The assurances provided within this report ensures that effective mechanisms are in place for the management of associated risks.

12.3 The risk register includes Strategic and operational health and safety related risks that are monitored monthly by EMT, SMT and key managers.

13. Strategic Alignment

13.1 The report aligns to the requirements from BMBC (Barnsley Metropolitan Borough Council) for the effective governance of Berneslai Homes. Exemplary health and safety links to the successful achievement of all our ambitions as it is a key control when undertaking business on behalf of Berneslai Homes.

14. Data Privacy

There are no data privacy implications arising from this report as no personal data has been processed.

15. Consumer Regulatory Standards

This report relates to the Safety and Quality Standard: Health and safety - When acting as landlords, registered providers must take all reasonable steps to ensure the health and safety of tenants in their homes and associated communal areas.

16. Other Statutory/Regulatory Compliance

16.1 Assurance related to the Health and Safety at Work etc. Act 1974 and associated regulations.

17. Financial

17.1 There are no financial implications arising directly from this report.

18. Human Resources and Equality, Diversity and Inclusion

18.1 Having effective Health and Safety Policies, procedures and programmes within Berneslai Homes ensures that stakeholders' health and safety is paramount in undertaking service delivery and that equality and diversity issues are taken into account in protecting individuals' health and safety.

19. Sustainability Implications

19.1 No specific zero carbon implications from this report.

20. Associated Background papers

20.1 N/A

21. Appendices

21.1 Appendix A – Health and Safety Policy 2024-26

21.2 Appendix B – Employee Health and Safety Performance Statistics 2023-24



EMPLOYEE HEALTH AND SAFETY POLICY 2024 to 2026

DOCUMENT CONTROL

Organisation	Berneslai Homes
Title	Health and Safety Policy
Author	Claire Denson, Risk and Governance Manager
Filename	Health and Safety Policy
Owner	Berneslai Homes Executive Management Team
Subject	Health and Safety
Commencement Date	December 2002
Applicable to	All Berneslai Homes employees, temporary staff, contractors, board members and anyone working on behalf of Berneslai Homes.
Information/ Action	For information and action to comply with procedure
Review Date	2-yearly
Review Responsibility	Claire Denson, Risk and Governance Manager

Revision History

Date	Version	Author	Comments
November 2016	V2.0	Claire Musson	Approved by SMT by email
December 2016	V2.0	Claire Musson	Approved by HR Committee
September 2017	V2.1	Claire Musson	Approved by HR Committee
September 2018	V2.2	Claire Musson	Approved SMT
September 2019	V2.3	Claire Denson	Reviewed by Claire Denson, Ian Bell and Darren Asquith
November 2019	V2.3	Claire Denson	Approved by Board and SMT by email
September 2020	V2.4	Claire Denson	Approved at Board and signed by Board
September 2021	V2.5	Claire Denson	Approved by EMT and Board
May 2022	V2.6	Claire Denson	Reviewed by Claire Denson, Ian Bell and Darren Asquith
July 2022	V2.6	Claire Denson	Approved by EMT and Board
June 2023	V2.7	Claire Denson	Reviewed by Claire Denson and Ian Bell
July 2023	V2.7	Claire Denson	Approved by EMT and Board
June 2024	V2.8	Claire Denson	Reviewed by Claire Denson, Ian Bell and Kerry Hamilton. Consultation with H&S Management groups.
July 2024	V2.8	Claire Denson	To be reviewed by Board

PREFACE

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- Statement of Health and Safety Policy Acceptance

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- 2.2 Main Duties of the Chief Executive
- 2.3 Main Duties of Executive Management Team
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- 2.6 Main Duties of Managers and Supervisors
- 2.7 Main Duties of Senior Designated Officers
- 2.8 Main Duties of Employees
- 2.9 Main Duties of Safety Representatives
- 2.10 Main Functions of Representatives of Employee Safety

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SECTION SIX **Control, Co-ordination and Communication Networks**

SECTION SEVEN **Employee Health & Safety Competencies**

SECTION EIGHT **Executive Management Team Acceptance of Health and Safety Policy Statement**

SECTION NINE **Board Acceptance of Health and Safety Policy Statement**

HEALTH AND SAFETY AT WORK ETC. ACT 1974
HEALTH AND SAFETY POLICY
PREFACE

This Health and Safety Policy has been prepared with the full co-operation of all Berneslai Homes recognised trade unions.

Thanks are offered to officials and employees who have devoted time and energy in contributing to the production of this working document.

This policy supersedes any previous policy. We recommend that all employees study this updated version carefully and put into practice the duties contained.

This policy does not contain details of the Operational Procedures or Operational Monitoring arrangements highlighted in Section Three of this document. These are prepared and filed separately on the corporate intranet and must be read in conjunction with this Policy.

SECTION ONE STATEMENT OF HEALTH AND SAFETY POLICY

Berneslai Homes is committed to ensuring the health, safety and welfare of all its employees, through accident, injury and ill-health prevention and all those persons who are affected by its activities.

Berneslai Homes recognises and accepts the duties and obligations imposed upon it as an employer by the Health & Safety at Work Etc. Act 1974 and subordinate health and safety legislation and realises the importance of placing health and safety as an overriding priority within its services.

To implement this policy, Berneslai Homes will, so far as is reasonably practicable, conform to the terms of my Statement of Health and Safety Policy and ensure the provision and maintenance of:

- a) A safe workplace, with safe access and egress.
- b) Safe plant and equipment.
- c) Effective information, instruction and training.
- d) Safe arrangements for the use, handling, storage and transport of articles and substances.
- e) Adequate welfare facilities.

To assist in achieving this process and in order for Berneslai Homes to fulfil its legal obligations required by the Management of Health and Safety at Work Regulations 1999, a competent person service is provided through a service level agreement with the BMBC Health, Safety and Emergency Resilience Service.

Whilst accepting the minimum legal standards set by national legislation, Berneslai Homes is committed to continuous improvement and promoting a health and safety culture that aims to produce high standards of health and safety. This process will continue to raise standards within Berneslai Homes beyond the minimum legal requirements. Berneslai Homes believes that achieving these high standards will positively contribute to the overall quality of the services provided.

Berneslai Homes accepts that, although the final level of responsibility for implementing the Berneslai Homes' policy rests with the Board and senior management of the organisation, each and every individual employee must take an active role in effectively implementing the policy. As Chief Executive, I urge all employees to cooperate fully in the measures Berneslai Homes will be taking as part of this Policy, in order to ensure that their work situations are as safe and healthy as possible.

The effectiveness of this policy and arrangements will be monitored and reviewed as and when necessary, but at intervals not exceeding 12 months.

The acceptance of my Statement of Health and Safety Policy as Chief Executive of Berneslai Homes and the implementation of the health and safety policy require the commitment of my management team. My management team and subsequently their management teams accept and are committed to implementing this policy and sign accordingly on the acceptance sheet in Sections Eight and Nine of the hard copy of this policy retained by me for inspection and/or for copying on request. An electronic copy of the Health and Safety Policy is placed on the intranet site of Berneslai Homes.

Signed for and on behalf of Berneslai Homes

Amanda Garrard, Chief Executive

Date:

SECTION TWO ORGANISATION DUTIES AND RESPONSIBILITIES

2.1 Board Members

Board Members have a responsibility to comply with the statutory duties imposed under the Health & Safety at Work Etc. Act 1974. This includes all duties imposed by regulations made under the above act and obligations under the general duty of care. The main duties of Board Members are to ensure:

- a) That the declared Statement of Health and Safety Policy is achieved, so far as is reasonably practicable, for the health and safety at work of all employees.
- b) That health and safety items receive appropriate attention and that sufficient funds/resources are made available to implement any such items.
- c) That adequate monitoring of the effectiveness of this policy is carried out.
- d) Approval of the Annual Health and Safety Report and commit to its objectives.

2.2 The Chief Executive

The Chief Executive has the overall responsibility for ensuring the operations of Berneslai Homes are executed at all times in such a manner as to provide, so far as is reasonably practicable, for the health, safety and welfare of all members and employees and all persons likely to be affected by Berneslai Homes' operations, including contractors and the public where appropriate.

BMBC Health, Safety and Emergency Resilience, via a Service Level Agreement, support the Chief Executive in the management of the Health, Safety and Emergency Resilience function. The main duties of the Chief Executive are to ensure:

- a) That the declared Statement of Health and Safety Policy is achieved, so far as is reasonably practicable, for the health, safety and welfare at work of all employees.
- b) That all employees are made aware that health, safety and welfare are regarded as having equal ranking with other management responsibilities.
- c) That the Health and Safety Policy is reviewed regularly, and appropriate changes made when necessary and the changes distributed and publicised appropriately.
- d) That all members of the Executive and Senior Management Team are advised of new regulations and proposed changes in legislation.
- e) That an effective health and safety organisation is established and maintained in order that the Berneslai Homes meets its obligations as detailed under the Management of Health and Safety at Work Regulations 1999.
- f) That all members of the Executive and Senior Management Team are fully aware of their responsibilities with respect to the health, safety and welfare at work of employees.
- f) There is liaison with the appropriate Trade Unions and employees on all policy matters concerning health, safety and welfare at work.

2.3 The Executive Management Team

The Executive Management Team are responsible for ensuring that detailed Operational Occupational Health and Safety Management Systems considered appropriate are formulated and implemented in their areas of responsibility. The main duties are:

- a) To ensure they understand the Berneslai Homes' Health and Safety Policy.
- b) To meet the declared aims of Berneslai Homes' Health and Safety Policy.
- c) To ensure the production of effective Operational Occupational Health and Safety Management Systems (comprising Health and Safety Standards and Monitoring) and Emergency Resilience Management Systems that detail how health and safety will be managed within their Directorates.
- d) To meet statutory requirements particularly with regard to the Management of Health and Safety at Work Regulations 1999.
- e) To ensure they take a positive lead in and champion Berneslai Homes' Operational Occupational Health and Safety Management Systems.
- f) To ensure that Berneslai Homes' Operational Occupational Health and Safety Management Systems are reviewed regularly with particular reference to organisational changes.
- g) To monitor and appraise the effectiveness of health and safety performance within Berneslai Homes and improve standards in areas of low performance.
- i) To advise their managers on new regulations and on any proposed changes in existing regulations.
- j) To seek advice and guidance as appropriate from competent and qualified representatives in regards to health and safety.
- k) To support Berneslai Homes emergency resilience arrangements as required.
- l) To ensure effective health, safety and welfare policies are in place and receive regular reports'
- m) To be satisfied that health and safety policies and procedures are kept under review and that continuous improvement is made towards a safer working environment including ill health.
- n) To ensure effective health, safety and welfare policies are in place in relation to other contractors.
- o) To oversee the development and implementation of a health and safety risk management plan.
- p) To ensure adequate safety inspection arrangements are in place.
- q) To oversee the implementation of safety audits.
- r) To oversee the delivery of health and safety training.

2.4 The Health and Safety Management Groups

Two groups operate (recognising the differences in business description and trading location):

- i) The Housing Management Group
- ii) The Construction Services Group

both comprising the relevant EMT member, a cross-section of staff representing each appropriate service, trade union representation, Construction Services health and safety manager and a representative from BMBC (Health, Safety and Emergency Resilience).

The Management Groups provide the operational management, direction and control of health and safety in Berneslai Homes. They operate under a Terms of Reference.

2.5 Health, Safety and Emergency Resilience

Under a Service Level Agreement BMBC Health, Safety and Emergency Resilience is responsible for assisting in the development and promotion of Berneslai Homes' occupational health and safety management system and for monitoring its implementation and effectiveness in line with the service level agreement. They provide Berneslai Homes' competent person general and specific advisory service to assist Berneslai Homes to fulfil their statutory requirements/duties.

2.6 Managers and Supervisors

Employees who manage or supervise other employees, trainees or clients have a particular responsibility for their health and safety arising out of the work activity. The main duties are:

- a) To ensure they are familiar with Berneslai Homes' Health and Safety Policy and its effective implementation within their own area of responsibility.
- b) To adequately plan and manage the work activity.
- c) To ensure an operational occupational health and safety management system (including Management Procedures, Health and Safety Instructions, Codes of Practice etc.) is understood and put into practice.
- d) To ensure they are familiar with the appropriate legal requirements concerning the health, safety and welfare of all employees in their area of responsibility and are complied with.
- e) To ensure that the advice of their management on health and safety matters is sought when necessary.
- f) To ensure that risk assessments are undertaken, and subsequently operational safety procedures are devised, implemented and adhered to.
- g) To ensure that operational procedural documents are reviewed regularly and as appropriate, e.g. risk assessments and operational procedures.
- h) To ensure their employees (including agency staff) are adequately informed, instructed, supervised and trained in health and safety matters.
- i) To take appropriate action with regard to any of their employees who fail to carry out any health and safety duty, for which they have received appropriate information, instruction and training, or who endanger themselves or any of their colleagues by any of their acts or omissions.
- j) To investigate any accident, occurrence or industrial disease, which causes injury or illness to an employee and to ensure the appropriate accident report is completed.
- k) To promote and help develop healthier and safer working practices.
- l) To ensure any identified unsafe or unhealthy situations are reported and rectified, so far as is reasonably practicable.
- m) To ensure, so far as is reasonably practicable, that their services do not endanger the general public.
- n) To support the corporate emergency resilience arrangements as required.
- o) To ensure that sub-contractors working on behalf of Berneslai Homes adhere to the Health and Safety Policy in accordance with HSE guidelines.

2.7 Senior Designated Officers

Senior Designated Officers or equivalent are to be appointed to all premises. They are responsible for coordinating procedures for ensuring the health, safety and welfare of the employees' in/on the premises and others who may be affected by the premises or the activities carried out within/on the premises. The main duties will be included in the Job Description of those appointed.

2.8 Employees

- a) To take reasonable care of their health, safety and welfare and others who may be affected by their acts or omissions.
- b) Cooperate with their employer to comply with statutory duties for health and safety.
- c) Use correctly and safely any work item provided by their employer in accordance with the training and instruction given.
- d) To assist their manager/supervisor, in reporting any accident or incident that may cause injury to a person or damage to plant or property.
- e) To be aware of and take heed of Risk Assessments prior to carrying out any work activity.
- f) Attendance at relevant training identified in relation to Health and Safety.
- g) To report any Health and Safety Risks they are aware of.

2.9 Safety Representatives

Safety Representatives have been appointed throughout Berneslai Homes by recognised Trade Unions. The duties of Safety Representatives are as detailed in the Safety Representatives and Safety Committees Regulations 1977.

2.10 Representatives of Employee Safety

Berneslai Homes recognises employees not represented by Trade Unions and Safety Representatives. These employees have rights to consultation with their employer under the Health and Safety (Consultation with Employees) Regulations 1996 through appointed Employee Representatives.

SECTION THREE ARRANGEMENTS FOR HEALTH AND SAFETY

The implementation of the Health and Safety Policy is largely a matter of establishing and implementing suitable and adequate safety arrangements.

The following sections are an overview of the key arrangements that we will implement in order to provide a safe and healthy place of work for employees, contractors, visitors and residents.

The Health and Safety Standards, Operational Procedures and Safety Monitoring Standards are designed to provide the framework and guidance to support compliance with relevant health and safety legislation.

Health and Safety Standards and Operational Procedures

Health and Safety Standards along with Operational Procedures explain the risk/task to be managed in basic terms, provide a summary of the requirements for the management of the risk/task, detail any records to be kept, outline the appropriate safe system of work, and outline how the standards are achieved within the company.

Safety Monitoring Standards

Allow managers to measure performance for relevant risks/tasks of health and safety against pre-set criteria and hence reveal where improvements are required.

The main health and safety standards, together with a brief description, are listed overleaf in Section Three. *Each item is hyperlinked to the relevant Health and Safety Standard, which are available from Berneslai Homes Health and Safety intranet page.*

3.1 Accident and Incident Reporting and Investigation

- a) In accordance with the Reporting of Injuries, Diseases and Dangerous Occurrence Regulations (RIDDOR) 2013 we are obliged to record and report accidents and injuries and near misses at work. This includes accidents to employees, visitors, contractors and residents.
- b) The [accident and incident reporting process](#) should be followed to enable us to comply with legislative requirements.
- c) All accidents, near misses, safety observations and violent incidents should be reported using the relevant accident/Incident form and forwarded to the BMBC Health and Safety and Emergency Resilience Service.
- d) Berneslai Homes recognises the role of employees in health and safety and will encourage and provide means for employees to report matters of concern regarding health and safety. The reporting form for matters of concern is the Safety Observation Report form.
- e) Where necessary the accident/incident/ill health will be reported to the Health and Safety Executive (HSE) in line with the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013 by the Health, Safety and Emergency Resilience Service or Construction Services Health and Safety Manager.

3.2 Asbestos

- a) Berneslai Homes is committed to complying with the legislative requirements of the Control of [Asbestos at Work](#) Regulations 2012 and associated legislation. Berneslai Homes has developed an asbestos policy and associated procedures with the aim of achieving compliance with this legislation.
- b) Berneslai Homes has a dedicated Asbestos Control Officer.

3.3 Civil Contingencies/Emergency Resilience

- a) Berneslai Homes is committed to complying with the Civil Contingencies Act 2004 and its associated legislation and guidance.
- b) Berneslai Homes has produced Corporate Emergency Response Plans (for [emergencies](#) and [business continuity](#)) including specific service responses in conjunction with the overarching BMBC Plan. These documents contain details of how Berneslai Homes will respond to an emergency, should it occur. These documents are continually under review and amendments are issued annually.
- c) The [Serious Incident Protocol](#) ensures that leadership have sufficient information to enable consensus decision-making in response to a serious incident.

3.4 Confined Spaces

- a) Berneslai Homes is committed to complying with the legislative requirements of the [Confined Spaces](#) Regulations 1997.
- b) Where a confined space has been identified as defined by HSE L101 Approved Code of Practice 'Safe Work in Confined Spaces', only suitably trained and competent persons will be allowed to work in these areas.

3.5 Construction

- a) Berneslai Homes is committed to complying with the legislative requirements of the [Construction \(Design and Management\)](#) Regulations 2015.
- b) Berneslai Homes provides CDM services and facilities to at least the minimum standards as required by the Construction (Design and Management) Regulations.
- c) Berneslai Homes is committed to establishing and maintaining a healthy and safe workplace for all its employees and others who may enter their premises by implementing the Construction (Design and Management) Regulations 2015.

3.6 Consultation Arrangements

- a) Berneslai Homes is committed to complying with the Safety Representatives and Safety Committees Regulations 1977 and the Health and Safety ([Consultation with Employees](#)) Regulations 1996.

3.7 Contractors

- a) All services appointing [contractors](#) must ensure that the contractors' competency to do the appointed task has been checked. Berneslai Homes and BMBC Health, Safety and Emergency Resilience service have access to a database of all Contractors who have been assessed, and approved to the 'Contractors Health and Safety Assessment Scheme' (CHAS) standard. Preferably all contractors must be registered and approved on this scheme before work commences unless a competent person from Berneslai Homes or the BMBC Health, Safety and Emergency Resilience Service consider that another form of assessment is appropriate with regard to the circumstances, e.g. Safety Schemes in Procurement (SSIP).

3.8 Display Screen Equipment (DSE)

- a) Berneslai Homes is committed to complying with legislative requirements as stated within the Health and Safety ([Display Screen Equipment](#)) Regulations 1992. Agile Display screen workstation assessments will be carried out using an Agile DSE self- assessment form, and annual review will take place and be recorded as a minimum or whenever a change in your workstation occurs.

3.9 Electrical Installations and Electrical Appliances

- a) Berneslai Homes is committed to complying with the legislative requirements of the Electricity at Work Regulations 1989, associated industry guidelines and the Provision and Use of Work Equipment Regulations 1998. These cover [Electrical \(Fixed\) Installations](#) and [Electrical Appliances](#).
- b) Berneslai Homes will engage competent persons, as required by the Electricity at Work Regulations 1989, to be responsible for the electrical testing of all portable appliances within Berneslai Homes owned premises. The competent person will determine the frequency of testing depending upon use of the equipment.
- c) Berneslai Homes has a dedicated Electrical Compliance Officer.

3.10 Enforcement of Health and Safety

- a) Berneslai Homes is committed to ensuring that all [contact with enforcement officers](#) is recorded, matters of concern addressed and actions required undertaken throughout the Company.

3.11 Fire and Emergency Arrangements

- a) Berneslai Homes owned premises comply with the Regulatory Reform (Fire Safety) Order 2005 (incorporating the Fire Safety Regulations 2022). This includes the carrying out a fire risk assessments and re-inspection programme. Frequency of inspection and review of assessments depends upon the individual building risk categorisation.
- b) Senior Designated Officers ensure regular periodic emergency evacuation drills are carried out in all premises that they are responsible for. All persons using the building with disabilities must be specifically catered for in relation to their evacuation procedures. All such evacuation drills are to be recorded in the building's Fire Log Book.
- c) [Fire and Emergency procedures](#) (including suspect packages and gas leaks) are in place within Berneslai Homes with designated Senior Designated Officers/Fire Marshals holding responsibility for managing these procedures in Berneslai Homes' occupied premises. All means of escape, fire detection/alarm systems and fire equipment are to be fully maintained.
- d) The Building Safety Act 2022 does not impact on the Employee Health and Safety Policy currently. Best practice will be undertaken, however, such as within Independent Living Accommodation. Berneslai homes has a Building Safety Manager and a dedicated Fire Safety Officer.

3.12 First Aid

- a) Berneslai Homes provides [first aid services](#), qualified first aid and emergency first aid employees and facilities to comply with the standards as required by the Health and Safety at Work (First Aid) Regulations 1981.

3.13 Gas Installations and Appliances

- a) Berneslai Homes is committed to complying with the legislative requirements of the Gas Safety (Installation and Use) Regulations 1998 (as amended 2018)
- b) Berneslai Homes will ensure that [gas installations and appliances](#) are safe and do not pose a risk to the health and safety of persons. All gas installations and appliances will be maintained by competent engineers registered with the Gas Safety Register.
- c) Installations and appliances will receive services and tests in compliance with the regulations. Managers must ensure that all employees are aware of the process of carrying out servicing and testing to the relevant standards. Managers will also carry out inspections of completed works to ascertain that the work is completed to the required standard.
- d) Berneslai Homes Partners and subcontractors shall keep an up-to-date register of all GAS SAFE registered engineers employed in the above duties. This shall be available for inspection as and when required.
- e) Berneslai Homes has dedicated gas safety officers.
- f) **Corporate Manslaughter Act 2007:**

An organisation is guilty of an offence under the act only if the way in which its activities are managed or organised by its Senior Management forms a substantial element in breach of the relevant duty of care owed to the deceased.

Senior Management Hierarchy

Board	Review of policy, performance management and resourcing
Chief Executive	Overview and reporting to Board
Executive Director of Property Services	Overall management and resourcing of service
Mechanical and Electrical Compliance Manager	Operational responsibility (programming, access, Quality assurance)

Contractor Failure

Failure to service appliances to the necessary standard.

Council Failure

Appointment of Contractor was negligent and led to an incompetent Contractor.

3.14 Hazardous Substances (COSHH)

- a) Berneslai Homes is committed to complying with the legislative requirements of the [Control of substances hazardous to health](#) regulations 2002 (as amended in 2004) Any substance which is deemed as Hazardous to Health as outlined within the regulations will be subjected to a COSHH assessment which will then be disseminated to those employees using the substance.
- b) Berneslai Homes recognises the increased risk to employees of incurring sharps injuries from discarded [drugs waste](#) and does not expect any of its employees to remove or dispose of discarded drugs/clinical waste which they may encounter whilst carrying out their duties unless they have received specific information, instruction and training and have the appropriate equipment.
- c) Berneslai Homes' policy on the management of [Zoonoses](#) shall be the same as that for all hazardous substances.

3.15 Health Surveillance and Occupational Health

- a) Berneslai Homes procures occupational health services for employees of Berneslai Homes. These services promote and maintain the highest degree of physical, mental and social wellbeing for workers in all occupations and undertake to protect the workers from factors adverse to their health.
- b) The occupational health services provide adequate [health surveillance provisions](#) as required by the Management of Health and Safety at Work Regulations 1999 to those employees who are exposed to hazards such as noise, asbestos and vibration.
- c) Managers shall identify those employed and others exposed to noise, asbestos or vibration and other such hazards and refer them to the occupational health service as required.

3.16 Agile Working

- a) Berneslai Homes is committed to ensuring the health, safety and welfare of all its employees and all those persons who are affected by its activities. This applies to those persons not only working within an office environment but those persons whose workplace is their own home (or where else they choose to work safely) and any other persons who may be affected by their activities.
- b) All [Home \(agile\) workers](#), as part of the Agile Working Policy, will be required to undertake a DSE and Homeworking Risk Assessment when commencing homeworking.

3.17 Information, Instruction and Training Arrangements

- a) [Health and safety information, instruction and training](#) form an integral part of the overall training within Berneslai Homes. This is particularly important with regard to induction training, which is arranged for all new employees entering Berneslai Homes by their Manager using Berneslai Homes' Induction Guide.

- b) The health and safety information, instruction and training needs of employees should be the subject of periodic review by Managers and any necessary refresher training carried out. Employees should have sufficient knowledge, skills and information to carry out their work in a safe and healthy manner.
- c) All managers should attend IOSH accredited or an equal and approved qualification training appropriate to their level of responsibility.
- d) Managers shall ensure that all health and safety training needs are considered in employees' Performance and Development Reviews and that training provided to employees is recorded.

3.18 Legionella

- a) Berneslai Homes is aware of and supports the contents, requirements and intentions of the Health and Safety at Work Etc. Act 1974, Control of substances hazardous to health regulations 2002 (as amended in 2004), the Control of Legionella Bacterial in Water Systems Approved Code of Practice 2013 L8 and associated UK regulations and requirements.
- b) Berneslai Homes will assess, prevent and control risks associated with the [legionella](#) bacteria and subsequent development of Legionnaires Disease from work activities and water systems on its premises.
- c) Berneslai Homes has a dedicated Water Hygiene officer.

3.19 Lifting Operations and Lifting Equipment

- a) Berneslai Homes is committed to complying with the legislative requirements of the [Lifting Operations and Lifting Equipment](#) Regulations 1998.
- b) Berneslai Homes will ensure that all lifting operations are planned and managed appropriately, and that all lifting equipment is inspected and tested to at least the legal minimum requirement.

3.20 Lone Working

- a) Berneslai Homes recognises the increased risks to [lone workers](#) and thus risk assessments cover lone workers with control measures implemented as appropriate to reduce the risks. Employees are informed of any additional risks they may face as a lone worker. This is also defined in the [Lone Worker Policy](#).
- b) Berneslai Homes recognises the fact that there are risks to employees in the provision of its services, but expects that people generally should be able to go about their duties without threat or fear of violence or aggressive intimidation resulting from their work.

3.21 Manual Handling

- a) Berneslai Homes is committed to complying with the legislative requirements of the [Manual Handling Operations Regulations 1992](#) (as amended).
- b) Managers are responsible for identifying all activities within their work area that involve manual handling and the employees who carry out these tasks continually as part of their normal working day. Managers must also make provisions for those employees who carry out manual handling activities on an occasional basis.

3.22 New and Expectant Mothers

- a) Berneslai Homes recognises the increased risks to [new and expectant mothers](#) and extends existing risk assessments to cover new and expectant mothers and implement control measures as appropriate to reduce the risks. Women are informed of any additional risks they may face as a new or expectant mother.
- b) [Risk assessments](#) will be undertaken when a woman notifies her manager that she is pregnant and reviewed periodically and when necessary. Additional control measures will be applied for six months after the birth or where necessary until such time as the new mother is no longer breastfeeding.

3.23 Noise

- a) Berneslai Homes is committed to complying with the legislative requirements of the Control of [Noise at Work](#) Regulations 2005.
- b) Berneslai Homes will ensure that where necessary noise assessments are carried out by a competent person and appropriate control measures introduced.

3.24 Partner and Subsidiary Organisations

- a) Berneslai Homes recognises the particular relationship between itself and its partner organisations. To this end Berneslai Homes will expect subsidiary and partner organisations to develop, produce and maintain a health and safety policy outlining their management systems for health and safety and detailing the general responsibilities of their employees at all levels.
- b) These policies and the management systems to which they refer are subject to audit by Berneslai Homes.

3.25 Permits to Work

- a) Berneslai Homes will where necessary due to the hazards and risk involved ensure that work activities will be controlled by the use of documented [permit to work](#) systems.

3.26 Personal Protective Equipment (PPE)

- a) Berneslai Homes is committed to complying with the legislative requirements stated within the [Personal Protective Equipment Regulations 1992 \(Amended 2022\)](#).
- b) Managers will be responsible for identifying and issuing PPE based upon a risk assessment relevant to the specific task being considered. However, managers should, wherever reasonably practicable, eliminate or reduce the risk at source before PPE is considered. The use of PPE should only be considered as a last resort. Where the need for PPE has been identified and its requirement is unavoidable, Managers should follow the guidance and implement the required control measures as referenced in the Health and Safety Standard.

3.27 Personal Safety (Violence and Aggression) and Amber/Purple Flag

- a) Berneslai Homes recognises the fact that there are risks to employees in the provision of its services, but expects that people generally should be able to go about their duties without threat or fear of violence or aggressive intimidation resulting from their work.
- b) Managers responsible for people, premises and services will assess, through risk assessment, the risk of [aggression, violence or potential violence to employees](#) and take all reasonably practicable measures to eliminate or reduce the level of risk to employees' health and safety.
- c) Employees are not expected to go alone into a potentially dangerous situation or unnecessarily put themselves at risk.
- d) Berneslai Homes will undertake to update and evaluate the Amber/Purple Flag database of premises and persons where and with whom violent incidents may occur, so that employees can more easily be made aware of challenging individuals. This will be alongside maintaining the BMBC Cautionary Contacts Database (CCD).

3.28 Risk Assessments

- a) Berneslai Homes is committed to implementing [risk assessment procedures](#) in order to comply with the Management of Health and Safety at Work Regulations 1999. These assessment procedures will ensure the identification, assessment and subsequent control of hazards and risks presented by its undertakings to employees and others is suitable and sufficient.

3.29 Safety Signs and Signals

- a) Berneslai Homes is committed to complying with the Health and Safety (Signs and Signals) Regulations 1996 and will ensure that where necessary suitable and sufficient [signs and signals](#) are provided to indicate safe conditions, prohibitions, mandatory control measures and specific hazards.

3.30 Stress and Employee Wellbeing

- a) Berneslai Homes is committed to protecting the health and welfare of its employees and with regard to work-related stress and general employee wellbeing and will ensure that necessary suitable and sufficient actions are undertaken to meet the Stress Management Policy and Dignity at Work Policy.

3.31 Trainees, Volunteers, Agency Workers and Seconded Workers

- a) Berneslai Homes recognises its responsibilities both as sponsor and managing agents to all its trainees, volunteers and agency workers. Therefore, they must be afforded the same level of commitment to health and safety as any employee.
- b) Berneslai Homes recognises its responsibilities to all those workers seconded to Berneslai Homes or working under the direct or indirect control of Berneslai Homes via a partnership or other such arrangement (seconded workers). Therefore, seconded workers must be afforded the same level of commitment to health and safety as any employee.

3.32 Vehicles and Occupational Road Risk

- a) Berneslai Homes is committed to complying with the general requirements of the Health and Safety at Work Etc. Act 1974, the Management of Health and Safety at Work Regulations 1999 and the Provision and Use of Work Equipment Regulations 1998 as they apply to vehicles.
- b) Berneslai Homes will ensure that all company vehicles are used, fuelled, loaded and unloaded and maintained in a suitable and sufficient manner.
- c) Berneslai Homes will ensure that all persons driving vehicles for [work-related journeys](#) are suitably informed; instructed; trained; licensed and insured as appropriate. This will ensure that work-related journeys are safe, staff are fit and are competent to drive safely, and the vehicles used are fit for purpose and in a safe condition. This is also define in the [Driving for Work Policy](#).

3.33 Vibration

- a) Berneslai Homes is committed to complying with the requirements of the Control of [Vibration at Work](#) Regulations 2005.
- b) Berneslai Homes will ensure that where necessary vibration assessments are carried out by a competent person and appropriate control measures introduced.

3.34 Visitors and the Public

- a) Berneslai Homes will conduct its undertakings in such a way as to ensure, so far as is reasonably practicable, that members of the public are not endangered by work carried out by its employees, whether on Berneslai Homes' premises or not.

- b) All reasonable action is to be taken to ensure that visitors are accompanied in areas where risks are known to exist, or those visitors are made aware of such risks.

3.35 Waste Management

- a) Berneslai Homes is committed to ensuring that the Environmental Protection Act 1990, the [Waste Management](#) Licensing Regulations 1994 and the Special Waste Regulations 1996 and the associated duty of care for waste are complied with throughout the company.
- b) Berneslai Homes will ensure that appropriate procedures are implemented to manage its waste and comply with the duty of care.

3.36 Work Equipment

- a) Berneslai Homes is committed to complying with legislative requirements of the Provision and Use of Work Equipment Regulations 1998, Lifting Operations and [Lifting Equipment](#) Regulations 1998 and Berneslai Homes' schedules for ensuring that all work equipment (hired or owned) is registered and inspected in accordance with statutory requirements.
- b) Managers must ensure that all employees receive suitable and sufficient information, instruction and training on the correct use of [work equipment](#) before they are charged in its use.
- c) Individual managers are responsible for ensuring all work equipment is registered and maintained.

3.37 Working at Height

- a) Berneslai Homes is committed to complying with the [Working at Height](#) Regulations 2005.
- b) Managers must ensure suitable safe systems of work are implemented for working at height, including the provision of appropriate information, instruction and training.

3.38 Working on or Near the Highway

- a) Berneslai Homes is committed to complying with the New Roads and Street Works Act 1991 and will ensure that any [works on or near the highway](#) are appropriately signed and traffic controlled.

3.39 Workplace Health, Safety & Welfare

- a) Berneslai Homes is committed to establishing and maintaining a healthy and safe workplace for all its employees and others who may enter our premises by implementing the [Health, Safety and Welfare](#) (Workplace) Regulations 1992.
- b) Advisors from the Health, Safety and Emergency Resilience Service are responsible for carrying out formal visual inspections of Berneslai Homes work premises in accordance with the Management of Health and Safety Audits of services undertaken 2-yearly.

- c) Managers are responsible for carrying out more frequent inspections, i.e. weekly, monthly, quarterly etc., of the area of responsibility depending on the nature of work that takes place.

3.40 Young Persons

- a) Berneslai Homes recognises the increased risks to young persons and will extend existing risk assessments to cover them and implement controls measures as appropriate to reduce the risks. They will be informed of any additional risks they may face as a young person.
- b) Additional risk assessments will be made when a young person is to enter the company for a short period of time during a work experience programme.

SECTION FOUR

HEALTH AND SAFETY PERFORMANCE OBJECTIVES 2024-2026

- a) All services will implement Berneslai Homes' Health and Safety Management System to a standard that would meet the Health, Safety and Emergency Resilience Service's "Satisfactory" rating upon audit.
- b) All Managers will ensure risk assessments are in place for all activities from which accidents/incidents occur.
- c) All services will contribute to Operational Safety Assurance Monitoring based on the Health and Safety Standards and the hazards and risks involved in the work activities.
- d) The Executive Management Team will obtain assurance that the Health and Safety Policy is embedded throughout their services as part of the Assurance Framework review.
- e) All services will contribute into the Berneslai Homes Emergency Response Plan and Continuity Plans.
- f) All services will produce occupation group risk assessments.

SECTION FIVE GLOSSARY OF TERMS

HEALTH AND SAFETY STANDARDS

Minimum health, safety and emergency preparedness standards that Berneslai Homes and indeed prospective partners are required to meet.

SAFETY MONITORING ASSURANCE STANDARDS

Pre-set criteria allowing Berneslai Homes to measure their performance, in particular elements of health, safety and emergency preparedness.

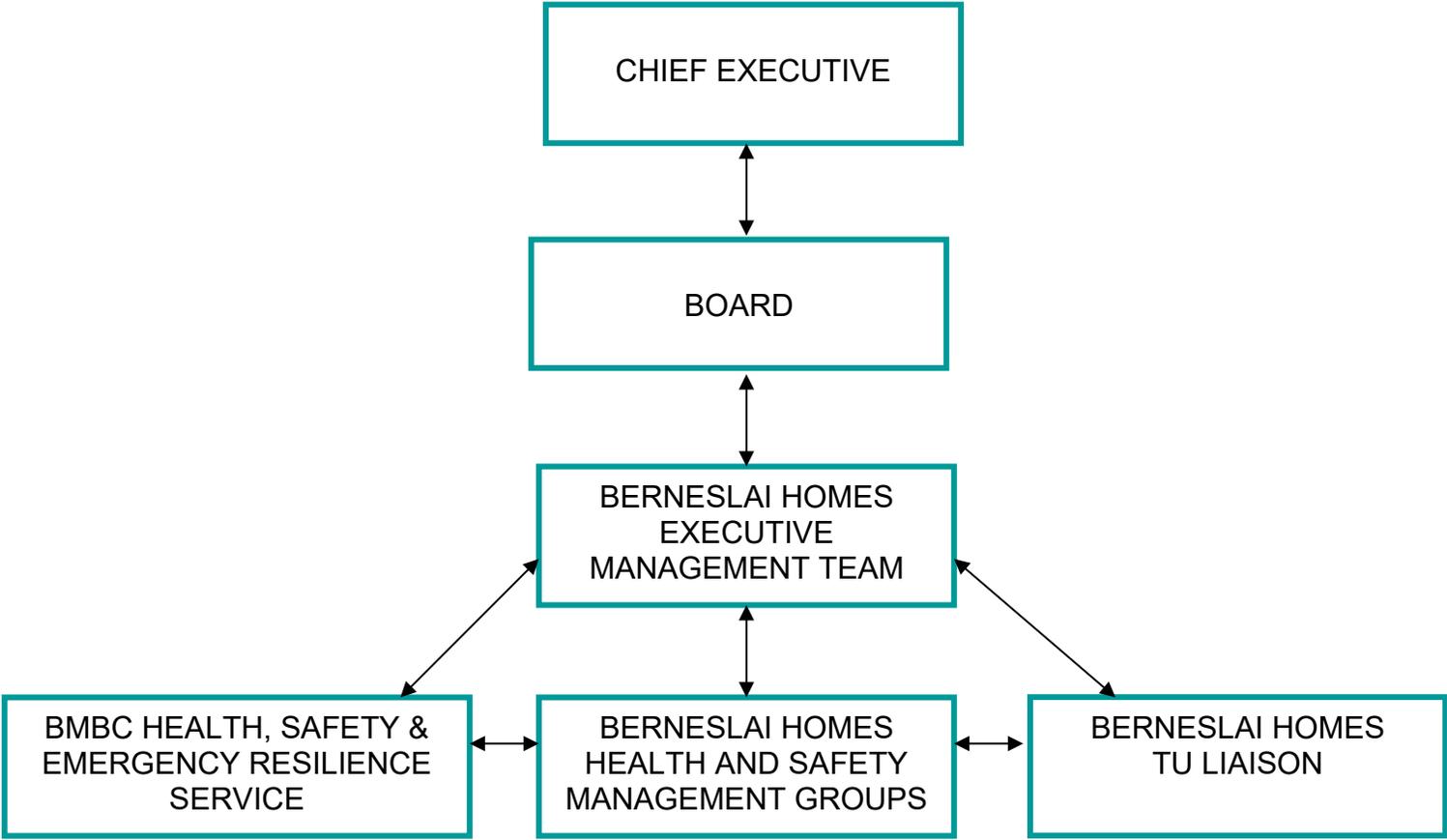
MANAGEMENT PROCEDURES

Documents, produced, issued and implemented by Berneslai Homes outlining how the required minimum standards are achieved.

OPERATIONAL HEALTH AND SAFETY MONITORING PROGRAMME

Programme outlining the periodicity in which Berneslai Homes complete the Health and Safety Standards relevant to their work activities.

SECTION SIX
INTERNAL HEALTH AND SAFETY CONTROL, CO-ORDINATION AND COMMUNICATION NETWORKS



SECTION SEVEN EMPLOYEES' HEALTH AND SAFETY COMPETENCIES

In order to achieve successful health and safety management, the Health and Safety Executive (HSE) state that:

“If employees [at ALL levels] are to make a maximum contribution to health and safety there must be proper arrangements in place to ensure that they are competent. This means more than simply training them, experience of applying skills and knowledge is another important ingredient...Managers need to be aware of relevant legislation and how to manage health and safety effectively...All employees [at ALL levels] need to be able to work in a safe and healthy manner.”

Therefore, all employees at all levels should have a clear understanding of the key occupational health and safety issues for Berneslai Homes (and in particular their department) and be continually developing their skills and knowledge. The guidance below details the health and safety competencies which are required in order to implement the responsibilities detailed in Section Two of this Policy.

7.1 Chief Executive and Executive/Senior Management Team

- a) Knowledge of the corporate occupational health and safety management system.
- b) Knowledge, as appropriate, of the monitoring regime for health and safety.
- c) Knowledge of the protocols and procedures for corporate governance, strategic risk management and statement of internal control.
- d) Knowledge of the strategic control, co-ordination, consultation and communication networks for health and safety.
- e) Knowledge of the strategic emergency response and continuity arrangements.

7.2 Managers and Supervisors

- a) In order to provide appropriate background knowledge of health and safety, successfully achieve the IOSH Managing Safely certificate or equivalent qualification in managing health and safety, which is currently the Site Management Safety Training Scheme (SMSTS) or Site Supervisors Safety Training Scheme (SSSTS)
- b) Knowledge of the corporate occupational health and safety management system.
- c) Knowledge, as appropriate, of the monitoring regime for health and safety.
- d) Knowledge of the protocols and procedures for operational risk management.
- e) Knowledge of the operational control, co-ordination, consultation and communication networks for health and safety.
- f) Knowledge of the operational emergency resilience and continuity arrangements.

7.3 Employees

- a) Attend health and safety induction training – corporate and role-specific.
- b) In order to provide appropriate background knowledge of health and safety, operatives successfully achieve the CITB Site Safety Plus or equivalent or CSCS card.
- c) Knowledge of the corporate occupational health and safety management system as it applies to employees.
- d) Knowledge of the safe systems of work for their role and activities undertaken within the role.
- e) Knowledge of the operational consultation and communication networks for health and safety.

**SECTION NINE
BOARD ACCEPTANCE OF HEALTH AND SAFETY POLICY**

Berneslai Homes Board approved the policy at its meeting on the 21 July 2022 and individual Board Directors have endorsed their support of the policy:

.....
Ken Taylor (Chair)

.....
Date

.....
Adam Hutchinson

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Date

.....
Richard Fryer

.....
Date

.....
Mark Johnson

.....
Date

.....
Jo Sugden

.....
Date

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Gez Morrall

.....
Date

.....
Rebecca Mather

.....
Date

.....
Sarah Tattersall

.....
Date

.....
Kevin Osborne

.....
Date



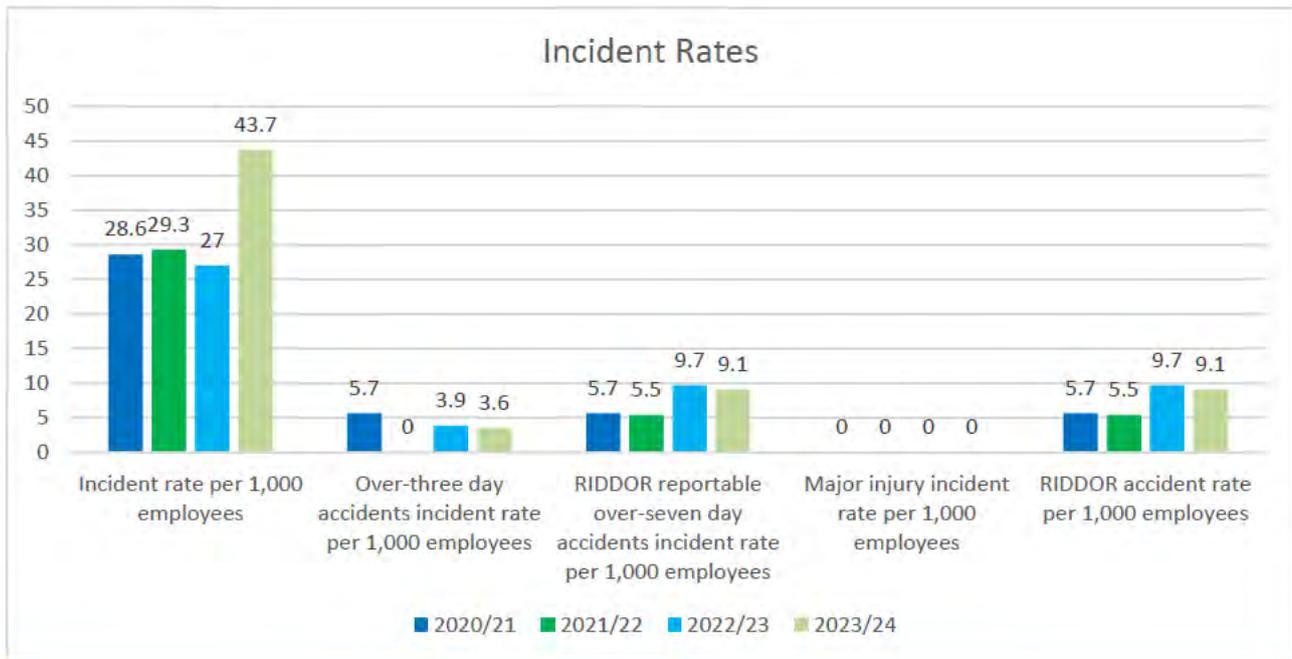
Berneslai Homes Employee Health and Safety Performance 2023 to 2024

1. PERFORMANCE

1.1 Accidents Statistics

Year	Reported accidents	Lost time accidents	Over 3 day accidents	Over 7 day accidents (new RIDDOR Reportable)	Major injury accidents	First aid accidents	Medical treatment Accidents (where employee attended hospital or GP)	Days lost due to accidents
2020/21	15	9	3	3	0	2	3	185
<i>Construction Services</i>	14	9	3	3	0	2	3	185
<i>Non-Construction Services</i>	1	0	0	0	0	0	0	0
2021/22	16	5	0	3	0	1	2	124
<i>Construction Services</i>	15	5	0	3	0	1	2	124
<i>Non-Construction Services</i>	1	0	0	0	0	0	0	0
2022/23	14	8	2	5	0	1	6	126
<i>Construction Services</i>	14	8	2	5	0	1	6	126
<i>Non-Construction Services</i>	0	0	0	0	0	0	0	0
2023/24	24	9	2	5	0	2	7	180
<i>Construction Services</i>	23	9	2	5	0	2	7	180
<i>Non-Construction Services</i>	1	0	0	0	0	0	0	0

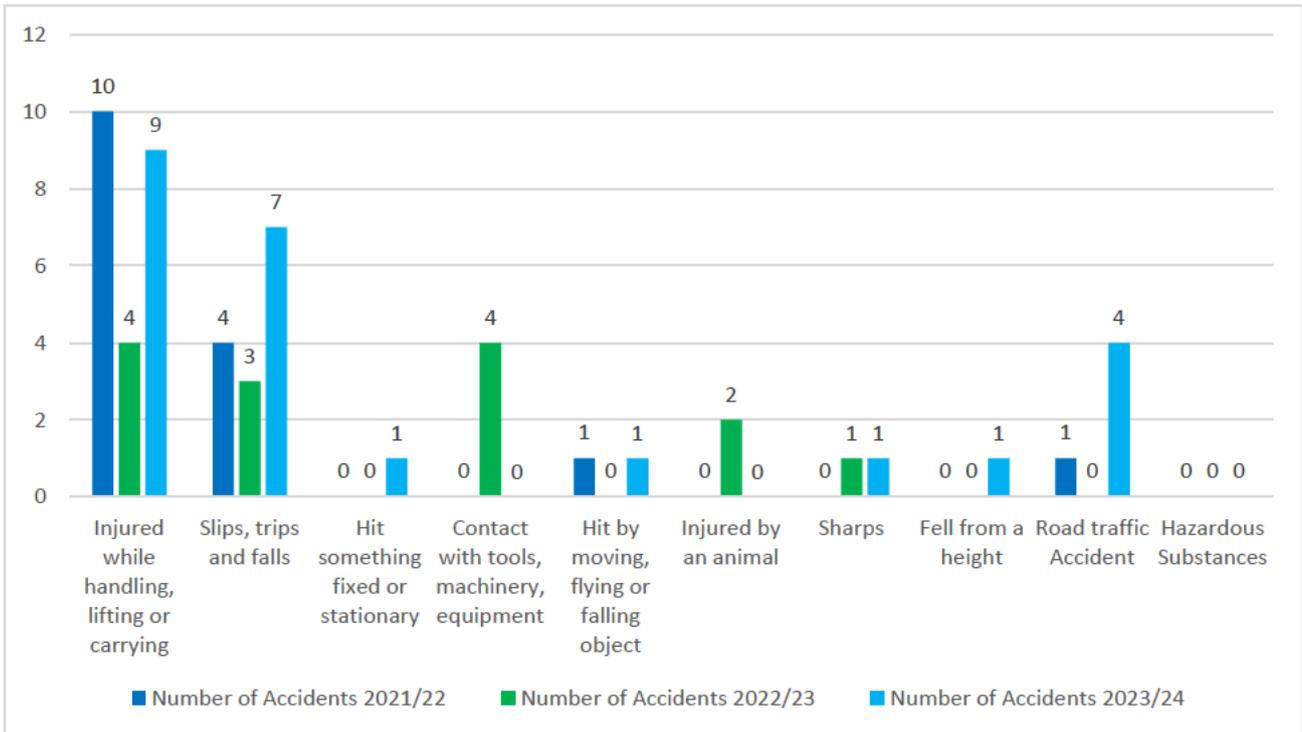
1.2 Incident Rates



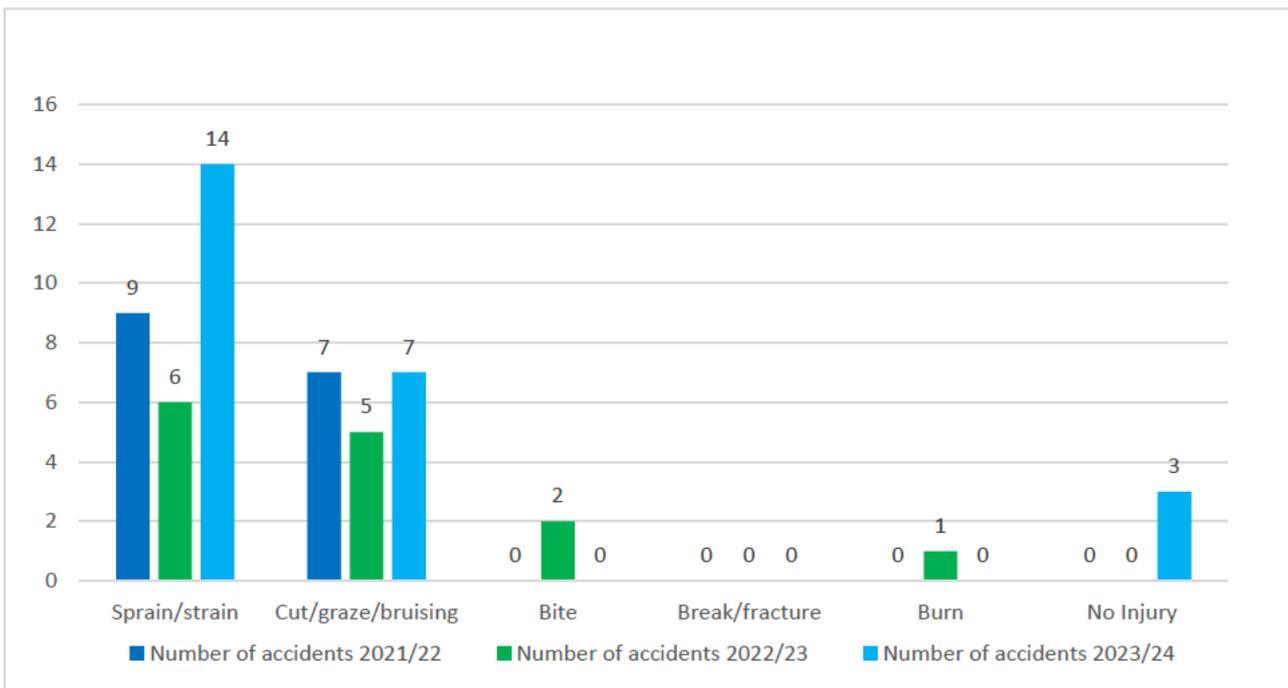
The incident rate is calculated by using the following formula:

$$\frac{24 \text{ (Total Number of Accidents)}}{549 \text{ (Number of Persons Employed)}} \times \frac{1000}{\text{(Unit Number of Employees)}} = 43.7$$

1.3 Causes of Accidents



1.4 Type of Injury

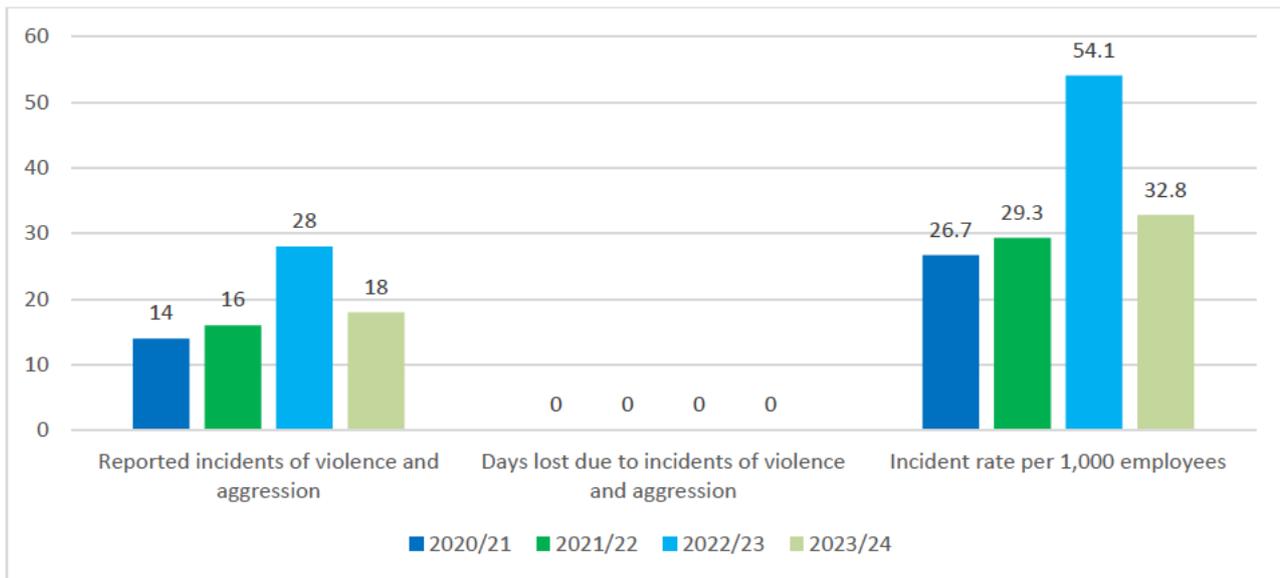


2. VIOLENCE AND AGGRESSION

2.1 Violent incidents are defined as:

- Any intentional acts that cause apprehension, fear, psychological or physical injury to an employee arising out of or in connection with their authorised duties
- The deliberate damage to the property or belongings of an employee that is attributable to the carrying out of duties on behalf of Berneslai Homes.

2.2 Incidents of Violence and Aggression



2.3 Types of Incidents of Violence and Aggression

Type of Incident	Number of Incidents		
	2021/22	2022/23	2023/24
Verbal abuse	8	5	2
Physical violence	1 (dog bite)	2 (no injury)	0
Aggression	7	20	12
Malicious intent	0	1	1
Sexual Harassment	0	0	1
Intentional damage to property	0	0	1
Weapon involved	0	0	1
Total	16	28	18

2.4 Types of Injuries Sustained in Incidents of Violence and Aggression

Type of injury	Number of Accidents		
	2021/22	2022/23	2023/24
No injury	15	28	18
Dog Bite	1	0	0
Total	16	28	18

3. RISK ASSESSMENTS

3.1 Responses provided to the question “had a risk assessment been carried out for the activity undertaken prior to the accident?” and the question “has a risk assessment been reviewed/developed for the activity undertaken after the accident?”

	Number of accidents where a risk assessment was indicated as being completed for the activity prior to the accident	% of accidents where a risk assessment was indicated as being completed for the activity prior to the accident	Number of accidents where, following the accident, a risk assessment was completed/ reviewed for the activity being undertaken prior to the accident	% of accidents where, following the accident, a risk assessment was completed/ reviewed for the activity being undertaken prior to the accident	Number of accidents
2020/21	14	100%	14	100%	14

	Number of accidents where a risk assessment was indicated as being completed for the activity prior to the accident	% of accidents where a risk assessment was indicated as being completed for the activity prior to the accident	Number of accidents where, following the accident, a risk assessment was completed/ reviewed for the activity being undertaken prior to the accident	% of accidents where, following the accident, a risk assessment was completed/ reviewed for the activity being undertaken prior to the accident	Number of accidents
2021/22	16	100%	16	100%	16
2022/23	14	100%	14	100%	14
2023/24	24	100%	24	100%	24

4. COST OF ACCIDENTS

Year	Total number of accidents reported	Number of days lost due to reported accidents	Average cost of each lost working day	Direct cost of days lost (based on days lost and the cost of the working days lost)
2020/21	14	185	£68.50	£12,673
2021/22	16	124	£77.86*	£9,655
2022/23	14	126	£84.12	£10,599
2023/24	24	180	£89.64	£16,136

*Commencing with the 2021-22 report, the median salary calculation has been revised to the mean salary, which best represents the true cost. $£32,720/365 \text{ days} = £89.64 \times 180 \text{ lost days} = £$

5. HEALTH AND SAFETY TRAINING PROVIDED TO EMPLOYEES

Course	Number of People Trained 2021/22	Number of People Trained 2022/23	Number of People Trained 2023/24
Abrasive Wheels		25	30
Asbestos Awareness	22		89
Asbestos Cat B (removal)	36	15	20
Cable Detection		39	32
CITB Working Safely		20	101
Conflict Management	29	23	61
DSE	1	0	1
Electrical Safety	1	0	6
Emergency Resilience	0	0	1
Fire Door	0	9	0
Fire Safety Course by Inside Housing	1	0	
Fire Safety	96	47	197
First Aid at Work	35	6	6
HETAS	2	0	2
IOSH Managing Safely inc refresher	2	35	20
Manual Handling	1	0	0
Mental Health Awareness	0	0	5
NEBOSH	0	2	0
Needlestick	8	27	46
NFA Building Safety Bill	0	0	
Paslude	6	0	

Course	Number of People Trained 2021/22	Number of People Trained 2022/23	Number of People Trained 2023/24
PASMA Use of Towers	0	5	0
Site Managers Safety (SMSTS)	9	9	5
Site Supervision Safety Training Scheme (SSSTS)	0	3	1
Stress Awareness	0	0	3
Working at Height	10	6	2
Total	191	271	616

6. MAJOR CAUSES OF ABSENCE FROM WORK

6.1 Mental/Emotional Wellbeing Ill Health absence relates to illnesses such as anxiety, stress, depression, and other psychiatric illnesses. Employees may have been absent due to a mental/emotional wellbeing related issue on more than one occasion, hence the difference between the total reported absences attributed to mental/emotional wellbeing related ill health and number of employees reporting those absences.

Year	Total absence days attributed to mental/emotional wellbeing ill health	Number of absences attributed to mental/emotional wellbeing ill health	Number of employees reporting absences attributed to mental/emotional wellbeing ill health	Absence rate attributed to mental/emotional wellbeing ill health per 1,000 employees	Percentage of employees reporting sickness absence attributed to mental/emotional wellbeing ill health	Number of days of absence per employee attributed to mental/emotional wellbeing ill health
2020/21	1,340	50	49	95	9.3%	2.6
2021/22	1,438	57	54	104	9.9%	2.6
2022/23	1,739	62	51	120	10.2%	3.4
2023/24	2,163	84	78	153	14.2%	3.9

6.2 Musculoskeletal Ill Health absence relates to sickness for:

- Arthritis
- Backache/pain
- Frozen shoulder
- Injury shoulder/forearm
- Injury foot/ankle
- Injury hip/thigh
- Injury knee/lower leg
- Injury shoulder/arm
- Injury wrist/hand
- Neck ache/pain
- Osteoarthritis
- Other back problems
- Other musculoskeletal
- Pulled muscle
- Sciatica
- Shoulder ache/pain
- Strain
- Broken arm, foot, toe, ankle.

Employees may have been absent due to a musculoskeletal related issue on more than one occasion, hence the difference between the total reported absences attributed to musculoskeletal related ill health and number of employees reporting absences attributed to musculoskeletal related ill health.

	Total absence days attributed to musculoskeletal ill health	Number of absences attributed to musculoskeletal ill health	Number of employees reporting absences attributed to musculoskeletal ill health	Absence rate attributed to musculoskeletal ill health per 1,000 employees	Percentage of employees reporting absences attributed to musculoskeletal ill health	Number of days of absence per employee attributed to musculoskeletal ill health
2020/21	1,064	51	46	97	8.7%	2.0
2021/22	1,589	75	64	137	11.7%	2.9
2022/23	1,453	78	64	151	12%	2.8
2023/24	1,596	78	71	142	12.9%	2.9

7. OCCUPATIONAL HEALTH

7.1 Referrals to Occupational Health Services

Referrals	Total Number of contacts
2020/21	210
2021/22	239
2022/23	349
2023/24	304

7.2 Type of Referral

	2021/22	2022/23	2023/24
Management Referrals	73	76	82
Statutory Health Surveillance ⁽¹⁾	8	133	26
Counselling Referrals	72	88	116
Physio Referrals	54	58	63
Pre-employment Health Screening	74	43	17
Total	281	398	304

⁽¹⁾ Statutory health surveillance refers to health surveillance undertaken in line with legal requirements such as hand-arm vibration screening, audiometry and lung-function testing.

7.3 Occupational Health Services Provided

Service	2021/22	2022/23	2023/24
Management Referral (including sickness absence and reviews)	73	76	87
Hand/arm vibration syndrome health surveillance	8 (questionnaire only)	133 (periodic assessment)	23 (tier 4 assessments)
Form 6 medical (assessment for application for early retirement on grounds of continuing ill health)	0	0	1
Audiometry testing (3yearly)	0	0	0
Case Conference	7	7	8

Service	2021/22	2022/23	2023/24
Workplace Assessment	0	0	0
Asbestos Medical Examination	0	0	0
Workstation Assessment	3	0	7
Spirometry/Lung Function Testing	0	0	3
Vaccination Programme (Flu)	143 – onsite at GP and Carlton	113 – onsite at GP and Carlton	92
Total	234	377	221

7.4 Occupational Health Contacts by Practitioner

Seen by	Numbers of Contacts 2021/22	Numbers of Contacts 2022/23	Number of contacts 2023/24
Physician/Specialist Practitioner in Occupational Health	13	22	119
Nurse	89	94	7
Did not attendees – Physician/Specialist Practitioner in Occupational Health	1	4	2
Did not attendees – Nurse	1	4	0
Could not attendees – Physician/Specialist Practitioner in Occupational Health	0	0	4
Could not attendees – Nurse	0	0	1
Total	104	124	133



Creating great homes and communities
with the people of Barnsley

Report Title	Building Safety Compliance Year End Report 2023/24	Confidential	No
Report Author	Arturo Gulla Executive Director Property Services	Report Status	For Approval
Report To	Board 11/7/2024	Officer Contact Details	ArturoGulla@berneslaihomes.co.uk

1. Executive Summary	<p>In 2023/24 we have seen Building Safety Compliance performance continue to improve with an overall average of 99.22% compliance with individual statutory legislation in relation to the six key compliance areas (Fire, Electrical, Gas, Asbestos, Legionella and Lifts) at year end.</p> <p>Positive Highlights:</p> <p>Berneslai Homes are 100% compliant across all 5 Building Safety Compliance TSM Measures which has been validated by BMBC Corporate Assurance Team.</p> <ul style="list-style-type: none"> • 100% compliance has been achieved for Gas (BS01) • 100% compliance has been achieved for Fire (BS02) • 100% compliance has been achieved for Asbestos (BS03) • 100% compliance has been achieved for non-domestic Legionella (BS04) • 100% compliance has been achieved for Passenger Lifts (BS05) <p>Areas of Focus:</p> <ul style="list-style-type: none"> • Fire safety equipment, servicing and maintenance was 99.25% compliant with 16 overdue fire door inspections due to 'no access' which we are pursuing. • Electrical Compliance to a 10-year position was 99.49% with 92 outstanding condition reports of which we have begun to implement initial legal proceedings to gain entry via injunction under the Housing Act. This is being led by a joint BMBC & Berneslai Homes Project Group who are successfully improving access and compliance
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	<p>performance to properties which were proving very challenging.</p> <ul style="list-style-type: none"> • Domestic Lifting Equipment had an overall compliance of 97.95% with 12 appliances outstanding, 8 of these were stairlifts, 6 with appointments booked, 1 step lift out of service and safe, 1 Through Floor Lift had a rat infestation and had to be re-scheduled and 2 Hoists that were 'no access' related. • Smoke and CO installations were still required to 462 properties which are 'no access' related with an overall compliance of 97.46%. <p>The Property Compliance team continue to work with Neighbourhood and Legal teams to gain access to properties to carry out inspections.</p> <p>There is an increase in works relating to Damp, Mould and Condensation (DMC) with 698 7-day reactive jobs raised in March. This area of work has had significant focus over the last year following the consultation on Awaab's law.</p> <p>There were 64 disrepair claims in the first quarter of 2024 which is higher than what was received in the full financial year for 2023 at 61. This is attributed to the backlog of planned repairs and elemental replacement works. A robust delivery strategy is in place to reduce the backlog during 2024/25.</p> <p>Reasonable Assurance from Internal Audit were received for Smoke/CO detectors and Lifts. In addition, Pennington Choices consultants undertook Building Safety Case desk top reviews for the three High-Rise buildings.</p>
<p>2. Recommendation/s</p>	<p>The report is provided for approval and Board is asked to approve on the basis that the performance is in line with expectations and that Board agree with the remedial actions set out in the report to respond to the areas for further work.</p>

3. Background

3.1 Berneslai Homes is committed to achieving the highest standards of building safety compliance and this report sets out Berneslai Homes' year end performance delivering this work across all key areas of compliance.

Board should note that Barnsley Council's Cabinet approved the Governance Arrangements for Building and Fire Safety in July 2023. This set out the Council's accountability as landlord of the 18,000-housing stock under the new Building Safety and Fire Acts and the responsibilities delegated under the services agreement to Berneslai Homes. As landlord, Barnsley Council has responsibilities under Fire Safety and Building Safety legislation and must ensure that buildings remain safe and that we include our tenants in ensuring the health and safety of their homes and communal areas.

- 3.2 We continue to be rigorously audited and scrutinised providing the necessary assurances on our compliance position, data, policies, procedures and processes. This is reported to Audit & Risk Committee on a quarterly basis. We were externally audited in Q3 of 2021-22 by Pennington Choices as part of a planned compliance audit and were internally audited by BMBC's Corporate Assurance Team in Q1 of 2022-23 looking at Fire Safety and Building Safety. In Q4 of 2023-24, we finalised audits on Lifts compliance and Smoke and CO Compliance receiving reasonable assurance. We are currently working through the agreed management actions. Pennington Choices have also carried out a desktop review of our Building Safety Cases in Q4 2023-24.
- 3.3 The teams are also focusing on performance improvements and efficiencies, working with both our contract partners Construction Services and Wates. Many changes have been initiated and implemented to drive improvements and efficiencies, and all teams are focused on the overarching objective to be fully compliant across all Building Safety compliance work streams. These have included a new compliance management system and streamlining processes. Both partners utilise the partnering arrangement to maximise resource availability in key areas and share best practice.
- 3.4 The Building Safety Scorecard was developed in line with Pennington Choices Compliance Roadmap to provide a clear oversight of performance and an understanding of actions being taken where improvement is required. The Building Safety Scorecard (attached at Appendix A) shows performance up to the end of March 2024. We are in the process of finalising our new Compliance Management System C365 which we aim to have fully functional by July of 2024 which will replace and enhance the current reporting arrangement.
- 3.5 Building Safety Compliance performance is a standard agenda item for Audit and Risk Committee consideration. It is also included in the performance report that goes through Customer Services Committee and also goes to BMBC's Services Agreement Core Group providing widespread oversight for check and challenge by both staff and customers in this critical area. Any areas of concern are escalated to the Delivery Plan Assurance Group and Members as required. An example of escalation and the development of a focussed task force, is the work on EICR access mentioned at 4.3.

4. Current Position/Issues for Consideration

- 4.1 The performance figures show that month on month what we have implemented is working, but also acknowledging where progress is still needed, we fully understand this and are taking appropriate actions to address as described below.
- 4.2 We are in a strong position from a **Fire** perspective, with the Fire Risk Assessment (FRA) programme continuing to retain 100% compliance. Outstanding remedial tasks have significantly improved with numbers reducing with 6 open actions at year end, 3 medium risk actions and 3 low risk actions all in date in line with our policy. In-plan actions are now closed and built into a range of formal work plans. All formal work plans have been built based on the risk of the building and of the action. During the year Pennington Choices undertook a review of Berneslai Homes draft Building Safety Cases to three High-Rise buildings.

- 4.3 **Electrical** compliance continues to improve with 10-year electrical compliance at 99.46% (92 condition reports outstanding) and 5-year compliance to 97.38% (479 condition reports outstanding). There were no outstanding C1 electrical remedial works. There are 334 C2 remedials in progress. We prioritised those properties that were outside the 10-year window and through a project group initiated by BMBC, we have worked with BMBC's neighbourhood teams and legal teams have developed a hard-hitting tenant leaflet and letter that has been delivered and had a positive impact on access with a 50% success rate for appointments booked. We continue to monitor and report on final access and compliance. We have also initiated legal proceedings to gain access to carry out overdue electrical inspection condition reports and any required remedial actions under the Housing Act legislation. Two bundles are prepared for court, and we await further instruction from BMBC Legal on next steps. We anticipate we will attend court in Q2.
- 4.4 **Gas** compliance at year end was at 100%. Following our robust processes and having the options to gain a warrant of entry where we have access issues allows Berneslai Homes to continue delivering strong compliance performance in this area.
- 4.5 **Asbestos** compliance continues to be at 100%. The reinspection programme was completed as required for the 23/24 programme.
- 4.6 **Water Hygiene** continues to perform well, with Legionella Risk Assessments (LRAs) for non-domestic properties remaining consistently at 100%. There were no overdue remedial tasks at year end and 2 in progress.
- 4.7 **Lifts** Passenger Lift compliance is 100%. Performance relating to domestic Lifting Equipment remains a focus, with overall compliance at 97.95% with 12 appliances non-compliant. The biggest challenge remains our ability to gain access to properties to carry out servicing, with 3 of the outstanding domestic lifts being 'no access' related. The Lifts Compliance Officer continues to work with the Neighbourhood teams to resolve this, as the legal channels available for gas compliance cannot currently be used for lifts.
- 4.8 Throughout the 2023-24 financial year, Berneslai Homes had 3833 reports relating to **damp, mould and condensation (DMC)**. All jobs of this nature were raised and issued to contract partners as 7-day orders in line with our policy with contract partners cumulative performance of 99.66% jobs being attended within 7 days.

We have seen reports of damp, mould and condensation increase during February and March since going live with NEC our new repairs system with over 1300 reports. The system has given front line staff and operatives the functionality to be able to pro-actively report properties they feel require a visit, so although the figures have increased, this is being taken in a positive light that our training and pro-active approach is working, and staff are adhering to our vulnerability protocol. This protocol outlines one key ask of all employees: to be aware of the importance of reporting suspected vulnerability even if you do not possess a great deal of knowledge of behaviours, symptoms and solutions and make sure you report instances where 'Something Doesn't Look Right'.

Complaints relating to DMC has increased with 13 Stage 1 complaints and 5 Stage 2 complaints open at year end. The main reasons for customer complaints have related to re-occurring issues, timeframes to complete larger elements of work, and communication.

Learning we have taken away from complaints have seen service improvements being implemented in the form of a creating a dedicated internal team, additional resources, the use of external specialists and improved communication.

EMT approval was granted to recruit 4 additional surveyors on 12-month fixed term contracts to assist in managing the increasing demand in relation to Damp, Mould, Disrepair and Complaints. We have appointed new specialist contractors for both Damp and Mould remediation works and have sourced external specialist surveys to aid in managing demand.

4.9 Barnsley Metropolitan Borough Council (BMBC) at year end (between January and March 2024) had received 64 **Disrepair** claims from 24 different solicitors. There has been a total of 224 disrepair claims received since January 2020 and the trend shows claims are on the increase every year with over £545k paid out in settlement costs during this period from the HRA, excluding staff costs involved in the process.

Disrepair Claims (Calendar Years)		
Year	Unit Number	Settlement Costs
2020	22	£109,670.90
2021	19	£152,725.16
2022	58	£122,383.03
2023	61	£147,420.11
2024 (to date)	64	£13,700
Total	224	£545,899.20

There were 57 'live claims at year end which were ongoing between solicitors, 8 of those being from 2023.

Ongoing (Live) Claims	
2023	8
2024	49
Total	57

The top 5 categories of disrepair claims related to the following works:

1. Damp and mould
2. Ill-fitting doors and windows
3. Cracks / holes / damaged plaster / leaks
4. Defective roof / guttering and masonry.
5. Defective electrics / lack of extractor fans.

Berneslai Homes have altered our short to medium term our strategic approach and whilst ensuring decency of the stock is maintained, in agreement with BMBC have vired capital budgets from investment programmes to aid in reducing our accumulated works which is the root cause of the increase in complaints and disrepair claims. We continue to monitor progress.

4.10 Berneslai Homes continue to strive to achieve 100% compliance across all areas and to maintain this performance and provide assurances to keep our tenants safe in their homes.

5. Customer Voice/Impact

This is operational/compliance information generated internally to ensure we meet our legal obligations and as such does not require direct input from tenants. However, the implications on tenants (from a health, safety, wellbeing and security perspective) are very significant.

Tenants have the opportunity to view and challenge our building safety compliance performance via various meetings they attend such as Customer Services Committee, Audit and Risk Committee and our Damp and Mould Task Group. We are completely open and transparent in publishing our performance via our annual report. Berneslai Homes have a very strong building safety resident engagement panel where challenge is encouraged.

As an organisation, we actively promote complaints as when we don't get things right, this is good insight and customer voice which helps us learn and improve.

6. Risk and Risk Appetite

6.1 Although Building Safety Compliance Performance remains strong at year end, whilst we do not hold 100% compliance or work is outstanding, there is always an averse risk for tenants, staff, Berneslai Homes and BMBC.

Operationally, there is a cautious risk appetite towards the increasing disrepair claims and compliance with new legislation aligned with the sector.

Operational/Strategic Risk Type	Name	Risk Appetite
Strategic	The health and Safety of Tenants and Staff	Averse
Strategic	Failure to meet increasing and changing regulatory requirements	Averse
Strategic	Damp, Mould and Condensation	Averse
Operational	Disrepair Increase	Cautious
Operational	Building Safety and Fire Safety – Compliance with legislation	Cautious

7. Strategic Alignment

Building Safety Compliance Performance aligns with both Berneslai Homes Strategic Plan and with BMBC's Barnsley 2030 strategy, primarily relating to Hearing Customers and Keeping Customers Safe. The measures are a good indicator of how we communicate with and listen to our tenants to ensure we comply with legislation and keep them safe in their homes.

8. Data Privacy

No personal data is used in the production of this report.

9. Consumer Regulatory Standards

Building Safety Compliance falls under the RSH (Safety and Quality) consumer standards and monitors our ability to provide our tenants with quality and safe homes.

10. Other Statutory/Regulatory Compliance

Provides assurance for the following legislation:

- Defective Premises Act 1972
- Environmental Protection Act 1990
- Landlord and Tenant Act 1985 (Section 11)
- Housing Act 2004
- Decent Homes Standard 2006
- Equality Act 2010
- Home Standard, Regulator of Social Housing 2015
- Homes (Fitness for Human Habitation) Act 2018
- Pre-Action Protocol for Housing Conditions Claims (England) 2021

11. Financial

All works are costed and budgeted and adherence to budget is reviewed and confirmed monthly by BMBC.

12. Human Resources and Equality. Diversity and Inclusion

The provision of a home that is warm, safe and comfortable is a fundamental requirement of the Decency standard, promotes good health and wellbeing and is a fundamental component of basic human rights.

Equality Impact Assessments are carried out on any large projects or procurement relating to Building Safety Compliance.

13. Sustainability Implications

None.

14. Associated Background Papers

None.

15. Appendices

Appendix A: Building Safety Scorecard – March 2024.

Appendix B: BMBC Letter to hard to access overdue electrical compliance properties.

Appendix C: Electrical Safety Leaflet

16. Glossary

BMBC – Barnsley Metropolitan Borough Council

TSM – Tenant Satisfaction Measure

CO – Carbon Monoxide

DMC – Damp, Mould and Condensation

FRA – Fire Risk Assessment

EMT – Executive Management Team

C1 – Code 1 (Danger Present - Immediate Remedial Action is Required as per NECEIC)

C2 – Code 2 (Potentially Dangerous - Urgent Remedial Action is Required as per NECEIC)

Barneslai Homes: Building Safety Compliance Scorecard

2023-24

Creating GREAT Homes & Communities for the People of Barnsley



BUILDING SAFETY SCORECARD

DATE REPORT RUN	Creating GREAT Homes & Communities for the People of Barnsley											
31/03/2024	Domestic Properties		Non-Domestic Properties		Other		Traveller site / Queens House					
TOTAL ASSET NUMBERS	17,961		753		34		44					
COMPLIANCE AREA	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	Data Source	Copy Provided	% Compliant	NARRATIVE - 1) Current Position, 2) Corrective Action Required, 3) Anticipated Impact of Corrective Action, 4) Progress with Completion Follow up Works
TENANT SATISFACTION MEASURES												
BS01: Gas safety checks	16,118	0							Spreadsheet		100.00%	
BS02: Fire safety checks	1,040	0							Spreadsheet		100.00%	100% Compliant
BS03: Asbestos safety checks	1,040	0							Spreadsheet		100.00%	100% Compliant
BS04: Water safety checks	907	0							Spreadsheet		100.00%	100% Compliant
BS05: Lift safety checks	438	0							Spreadsheet		100.00%	100% Compliant
FIRE SAFETY - Fire Risk Assessment (FRA) PROGRAMME												
Assets on Programme			211	0	0	0			Spreadsheet		100.00%	100% Compliant
Assets NOT on Programme			542		34							
FIRE SAFETY - REMEDIAL ACTIONS												
Immediate Action Required			0	0	0	0			Spreadsheet/C365			All the In Planned works actions identified have been reviewed based on the level risk for the action and building for example fire door replacements programme may be carried out over 5 years starting with the higher rise buildings first. All programme of works will be monitored through the building safety project board to ensure compliance and budget reviewed annually.
High (2 month)			0	0	0	0			Spreadsheet/C365			
Medium (6 months)			3	0	0	0			Spreadsheet/C365			
Low (12 months)			3	0	0	0			Spreadsheet/C365			
In plan works - High			0	0	0	0			Spreadsheet/C365			
In plan works - Medium			0	0	0	0			Spreadsheet/C365			
In plan works - Low			0	0	0	0			Spreadsheet/C365			
All Fire Actions			6	0	0	0						
FIRE SAFETY - EQUIPMENT SERVICING & MAINTENANCE												
Fire Detection & Warning			120	0					Spreadsheet		100.00%	All fire door inspections are being carried out using QR codes on the mobile worker app on C365, this allows us to monitor no accesses, currently we have 15 no accesses across the 3 high rise buildings, all no accesses are following the no access procedure.
Emergency Lighting			111	0					Spreadsheet		100.00%	
Fire Extinguishers			306	0					Spreadsheet		100.00%	
Smoke Vents			2	0					Spreadsheet		100.00%	
Fire Blankets			54	0					Spreadsheet		100.00%	
Communal Fire Door Inspections			575	0					PIMMS		100.00%	
Flat Entrance Fire Door inspections			956	16					PIMMS		98.35%	
All Fire Actions			2124	16							99.25%	
FIRE SAFETY - FIRES REPORTED (CUMULATIVE)												
Total number of fires reported within reporting year	41								Spreadsheet			
FIRE SAFETY - PROPERTIES WITH SMOKE / CO ALARMS FITTED												
Assets on Programme	17,708	462									97.46%	
Assets NOT on Programme	18,170											
DAMP AND MOULD - REPAIR REQUESTS												
7-day jobs raised during month		698							Spreadsheet		3.89%	CS: 441 open, 125 completed, 8 cancelled TOTAL 574 Wates: 11 open, 102 completed, 11 cancelled TOTAL 124 HHSRS hazard identified at 33 Victoria Road, Barnsley x1
Open 7-day jobs at month end		452							Spreadsheet		2.52%	
HHSRS (CAT1/2) damp / mould risks identified in month		1							Spreadsheet		0.01%	
DAMP AND MOULD - COMPLAINTS												
Open stage 1 complaints		13							Customer Services		0.07%	
Open stage 2 complaints		5							Customer Services		0.03%	
Total		18							Customer Services		0.10%	
DAMP AND MOULD - DISREPAIR CLAIMS												
Total live claims relating to damp and mould (cum in yr)		83							Spreadsheet		0.46%	
ELECTRICAL SAFETY - Electrical Installation Condition Report (EICR) PROGRAMME < 10 years and < 5 years												
Assets on Programme with an in date EICR <10 years	17,892	92					44	0	Workbooks		99.49%	The first 25 properties to receive a legal letter from BMBC have been identified. These letters will be delivered by hand before the end of W/C 01-04-2024. These 25 properties have received 3 access letters and missed all 3 appointments.
Assets on Programme	17,984						44					
Assets on Programme with an in date EICR <5 yrs	17,505	479	220	0			44	0	Workbooks		97.38%	As above.

COMPLIANCE AREA	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	Data Source	Copy Provided	% Compliant	NARRATIVE - 1) Current Position, 2) Corrective Action Required, 3) Anticipated Impact of Corrective Action, 4) Progress with Completion Follow up Works
Assets on Programme	17,984		220				44					
C-1	0	0	0	0			0	0	Spreadsheet			A change to process has now been agreed with Construction Services which should reduce the number of C2 and FI codes provided by this partner.this should ensure
C-2	83	251	0	0			0	0	Spreadsheet			
GAS SERVICING												
Assets on Programme	16,060	0	4	0	51	0			Spreadsheet		100.00%	
Assets NOT on Programme	0		749		0							
COMMERCIAL GAS REMEDIALS												
All commercial gas remedials					0	0					100.00%	
DOMESTIC PROPERTIES (Without Gas)												
Assets on Programme	635	0							Partners		100.00%	
DOMESTIC PROPERTIES (Without Gas)												
No. of Voids Capped in Month within 24 hrs of Becoming Void									Partners		No data	
No of Tenanted Homes Capped [monitoring metric only] long term capped off												
No of Tenanted Homes Capped [monitoring metric only]	176								Partners			
Solid Fuel												
Homes on the Programme	109	0							Spreadsheet		100.00%	
Asbestos												
Assets on Programme			534	0	25	0	1	0	PIMSS/Spreadsheet		100.00%	
Assets NOT on Programme			219		9		43					
WATER HYGIENE: Legionella risk assessments												
Assets on Programme	16821	46	62	0	20	14	0	0	PIMSS, Spreadsheet		99.65%	The remaining domestic 46 LRAs are proving to be more challenging to arrange. Compliance Officer now exploring other options to access these properties, as most have been visited several times by Wates / CS. Other Commercial: LRAs all completed and up-to-date.
Assets NOT on Programme	1140		691		14		44					(Shops): Compliance Officer continues to work with BMBC to encourage tenants to carry out LRAs or to agree for CS to complete them. BMBC are now re-contacting all housing shop tenants with more Legionella information so they understand why these assessments are required.
WATER HYGIENE: Inspection checks												
Flushing			158	1					Teams / spreadsheet		99.37%	Weekly Temps - 1 X Uncompliant Burton Grange CC no access due to damaged door shutter. New Lodge CC still closed due to refurb.
Temperatures			56	1					Teams / spreadsheet		98.25%	Monthly Temps - 1 X Uncompliant Burton Grange CC no access due to damaged shutter which is awaiting repair. New Lodge CC still closed due to refurb.
Annual monitoring			58	0					Teams / spreadsheet		100.00%	Annual Monitoring - All complete
			272	2							99.27%	
WATER HYGIENE												
High (1 month)	0	0	2	0								
Medium (3 months)	0	0	0	0								
Low (6 months)	0	0	0	0					SAP/Spreadsheet			2 remedials ordered both in date
All Actions	0	0	2	0								
SERVICE & MAINTENANCE CHECKS												
Passenger Lifts(14) / Platform lifts (6)	20	0							Engineers sheets		100.00%	all passenger lifts compliant
Stairlifts	422	8							Engineers sheets		98.14%	8 uncompliant - 6 now booked in for April. 1 requires removal tenant has refused this removal - Compliance Officer trying to get a letter legally approved as stairlift is still on. 1 historic access issues Compliance Officer working with Neighbourhood Officer - next step to ring social services to see if tenant has a social worker.
Steplifts	1	1							Engineers sheets		50.00%	please note 1 Steplift out of service (off). this has been passed back to E&A as user has passed away and costs to repair are escalating. OTs now to assess tenant. Compliance Officer has chased this up with BMBC W/C 18/03/24
Throughfloor lifts (TFL)	29	1							Engineers sheets		96.67%	1 Through Floor Lift uncompliant - this is due to rat infestation in the property. waiting for go-ahead to book service in from Neighbourhood Officer
Hoists	101	2							Engineers sheets		98.06%	2 uncompliant with access issues. 1 has now been booked in to service in April. Neighbourhood Officer involved to get into the other property.
All	573	12									97.95%	

COMPLIANCE AREA	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	In Date / Compliant	Expired / Non-Compliant	Data Source	Copy Provided	% Compliant	NARRATIVE - 1) Current Position, 2) Corrective Action Required, 3) Anticipated Impact of Corrective Action, 4) Progress with Completion Follow up Works
ENERGY EFFICIENCY												
SCS	15,072	2,889							Spreadsheet		83.92%	<p>This figure is contributed to by contractors / contract partners.</p> <ul style="list-style-type: none"> Pennington Choices have returned 13,173 surveyed assets – attaining a 84% success rate based on the 15,700 assets we asked to be surveyed. ES have returned 1,201 surveyed assets – attaining a 77% success rate based on the 1,567 assets we asked to be surveyed. Wates have returned 382 assets so far. A further 316 assets are expected (and included in the year end figure), which would help to attain a 89% success rate based on the 783 assets we asked to be surveyed. <p>The programme will resume in early May, with Pennington’s seeking to deliver a mop up programme.</p>
EPC	14,901	3,060							PIMSS		82.96%	<p>This figure is contributed to by contractors / contract partners.</p> <ul style="list-style-type: none"> Pennington Choices have returned 9,551 surveyed assets – attaining a near 100% success rate based on the 9,600 assets we asked to be surveyed (though further reconciliation is required to verify this further). ES have returned 643 surveyed assets – attaining a 40% success rate based on the 1,567 assets we asked to be surveyed. Wates have returned 177 surveyed assets – attaining a 23% success rate based on the 783 assets we asked to be surveyed. <p>The programme will resume in early May, with Pennington’s seeking to deliver a mop up programme. Contract partners are still delivering EPCs so it is hoped that at least 50% from both partners is delivered. Further reconciliation is needed with the EPCs as some are moving out of the 10 year cycle date.</p>



**Public Health & Communities Directorate
Communities Business Unit
Safer Neighbourhood Service
Head of Service: Paul Brannan**

Appendix B

My Ref: EICR programme
Your Ref:
Date: 04/04/2024
Enquiries Robert Truelove or Liam Wragg
Direct Dial: 07971802931 or 07789942325
E-Mail: complianceadmin@berneslaihomes.co.uk

Dear

Overdue <u>Electrical Installation Condition Report (EICR)</u> <u>Enforcement Action Warning</u>

I am writing to inform you that Barnsley Council has received a referral from Berneslai Homes following your persistent failure to allow access to carry out the above safety check, which is now overdue. This is placing your household and your neighbours at an unnecessary and unacceptable risk.

The purpose of this letter is to allow you a final opportunity to arrange and keep an appointment to carry out the safety check. This must be done immediately by contacting Robert Truelove or Liam Wragg on the numbers above.

Failure to do so is likely to result in the council, as your Landlord, taking one or both of the following actions:

- **servng you with a Notice Seeking Possession of your home for breaching your tenancy agreement with us.**
- **seeking a court injunction to allow entry to the property to carry out the inspection and any subsequent repairs required. This will incur costs of up to £2,000, payable by you.**

If you would like to discuss this matter further or do not fully understand the content of this letter, please do not hesitate to contact Robert Truelove or Liam Wragg using the details above.

Yours sincerely

Robert Truelove
Electrical Compliance Officer



Frequently Asked Questions:

What does the inspection entail?

During the inspection qualified electricians will call at your home address at the pre-arranged time. They will need to access a number of sockets in your home to check that the output and earthing is correct. They will undertake a visual inspection of your fixed lighting. This will not include items such as bedside lights. The process will take around 2 hours, but this may be longer if for example switches need to be replaced. They will also need to access your main fuseboard.

Will the electricians need to move any furniture?

No. The electricians will work around you, only moving necessary objects to be able to reach a selection of sockets. Not all sockets will require testing. The team will need to access your meter and fuseboard to complete the testing, so if either of these are in a cupboard then we would ask tenants to ensure that the electricians can gain access.

Will the inspection involve lifting carpets, tiles or laminate flooring.

No. The inspection is nonintrusive, but the electricians will need to access every room.

Will the electricians remove their work boots?

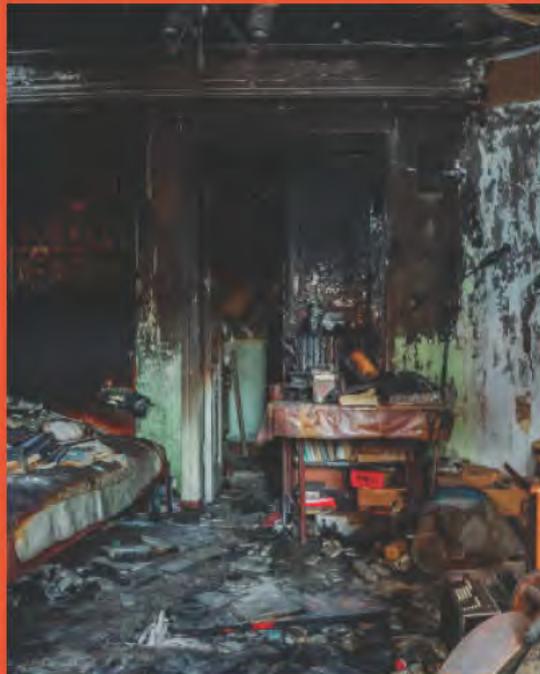
The electricians will wear overshoes to protect your carpets throughout the appointment.

What will happen if I fail to make an appointment?

The Council has set out its intentions overleaf regarding failure to allow entry to conduct this safety check and complete any necessary works.

IMPORTANT! We need access to your home for the required electrical testing

Keeping you and your family safe is our top priority



Allowing us access can help prevent situations like those pictured above!

WE NEED ACCESS TO YOUR HOME

DO NOT IGNORE THIS NOTICE AS FAILURE TO COMPLY WOULD REQUIRE BERNESLAI HOMES TO TAKE LEGAL ACTION AGAINST YOU IN ORDER TO GAIN ACCESS AND SEEK COSTS OF UP TO £2000 FOR SUCH LEGAL ACTION

We've been unable to access your home to carry out essential electrical safety checks to ensure that your home is free of any serious electrical hazards.

The electrical safety checks at this address are now **OVERDUE**. We **MUST** conduct these checks in your home immediately!

The electrical safety checks are a legal requirement. They identify any potential hazards or risks within the electrical installation. Electrical faults can cause electric shocks and fires, putting you and your loved ones at risk of serious injury or even death. A house-fire can be a distressing experience – how would you feel if you lost and had to replace your loved possessions, cherished mementoes and family photographs?

The inspection and testing can take a few hours to complete. It is non-invasive so we will leave no mess and will cause minimal disruption.

Please call us immediately on **01226 787878** to confirm your appointment.



Creating great homes and communities with the people of Barnsley

Report Title	Berneslai Homes Annual Review 2023/24	Confidential	No
Report Author	Chief Executive	Report Status	For Approval
Report To	Board 11/7/2024	Officer Contact Details	Amanda Garrard amandagarrard@berneslaihomes.co.uk Tel 07802851749

1. Executive Summary	<p>The annual review for 2023/24 highlights the key achievements and challenges faced by Berneslai Homes.</p> <p>Despite a tough external environment marked by a cost of living crisis and rising inflation, the organisation has made significant strides in improving services, aligning with Barnsley Council's ambitions, and enhancing tenant safety through initiatives like the Building Fire Safety Residents' Panel.</p> <p>What We Delivered</p> <p>Working with some of our most vulnerable tenants we have provided holistic support and helping them secure additional income of £1.19M during the year. The Tenant First team has worked with frontline teams to ensure tenants have the support they need and are able to sustain their tenancies.</p> <p>The most important service for tenants is repairs and investment and nearly 77000 repairs were completed during the year along with 1890 damp, mould and condensation inspections. With 1000 homes having additional energy efficiency works tenants are benefiting from reduced energy usage and cash savings. A further 1275 homes had investment works of £11.4M and 1345 tenants benefited from adaptations to their homes.</p> <p>Performance</p> <p>Keeping tenants safe remains our first priority and we have 100% compliance on all 5 building safety TSMs.</p> <p>Overall performance is strong against Housemark benchmarking but acknowledging we need to ensure we hear tenants and keep them updated.</p> <p>We have retained a focus on savings and efficiencies with £1M recurrent annual savings.</p>
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There is clear alignment with BMBC and Barnsley 2030 ambitions in the Annual Business Action Plan, with all 21 actions fully or partially met.

Customer Insight & Engagement

With over 10000 customer engagement opportunities in 2023/24 we have heard from a wide range of tenants giving valuable insight, assisting us to improve services and provide a steer on policies and strategies.

We have used the information about tenants to understand their needs and inform service delivery.

Working In Partnership

Working with involved tenants we established the Building Fire Safety Residents' Panel who worked with other tenants to promote the installation of sprinkler systems and the consulted on the closure of bin chutes in the high rise blocks.

The Scrutiny Panel and SEAP assessors focussed on adaptations and empty homes leading to policy changes. The TVP remain key partners and challengers for policy, strategy and performance issues.

As an anchor organisation in the Borough we work effectively with partners including South Yorkshire Police, South Yorkshire Fire and Rescue, CAB, Barnsley College and BMBC to tackle issues including ASB, community safety and fire safety.

Learning Organisation

We actively seek best practice to improve services utilising a range of organisations to support this aim.

We received the Housemark Accreditation for our work on complaints but know this is an area of continued focus.

We are committed to be a fair, inclusive and transparent organisation that understands the needs of customers and attracts professional and committed staff.

Challenges & Improvements

As demand for services increase, along with inflation on materials we have a backlog of works that we are actively working on and commit to ensuring tenants are regularly updated on affected works.

We will continue to work with tenants to assist us to improve communications and ensure we hear from a broad range of people.

We remain committed to our vision to deliver great homes and communities with the people of Barnsley.

2. Recommendation/s

- Board is requested to approve the annual review, noting the achievements and areas for improvement.

The full report will be presented to BMBC Cabinet in August 2024, providing an opportunity for further scrutiny and feedback.

3. Appendices

Appendix A – Berneslai Homes Annual Review

Appendix B - Berneslai Homes Year End Performance Report 2023/24

Appendix C - Annual Business Action Plan Progress

Jargon Buster

ASB	–	Anti Social Behaviour
BMBC	–	Barnsley Metropolitan Borough Council
CAB	–	Citizens Advice Barnsley
SEAP	–	Service Excellence Assessor Programme
TSM	–	Tenant Satisfaction Measure
TVP	–	Tenant Voice Panel



Berneslai Homes Annual Review

1. SECTION 1 – ANNUAL REVIEW CONTEXT

Welcome to the 2023/24 Berneslai Homes annual review in which we outline some of the great work undertaken in the year with tenants, to improve the services we provide.

The report is set within the context of a tough external environment, a cost of living crisis impacting significantly on tenants, rising inflation affecting the cost of materials and increasing expectations and demands for the services we provide.

The change to a more proactive approach from the Regulator of Social Housing is welcomed, with a greater focus on tenants and customers via the new consumer standards effective from 1st April 2024.

Keeping tenants safe remains a national and Berneslai Homes priority, with continued improvements and significant works undertaken during the year with the newly formed Building Fire Safety Resident's Panel.

Within Barnsley, Berneslai Homes continue to align priorities to those of Barnsley Council and the Barnsley 2030 ambitions. We continue to work together with tenants and partners to improve services, modernise systems and be as efficient as possible, restructuring services to increase frontline staffing and seeking ways to reduce costs including the use of technology.



2. SECTION 2 - WHAT WE DELIVERED 2023/24

Throughout the challenging year much was achieved working with tenants and partners to improve homes, communities and peoples' lives.

2.1 Supporting our Tenants

We have continued to support tenants who are struggling with the cost of living, to help them to pay their rent, bills, and essential items.

Our specialist Tenants First team continue to give tenants the right support at the right time. With five distinct service areas (Family Intervention, Financial Inclusion, Housing Coaches, Employment and Skills, and Mental Health Housing Support). The team can identify what help is needed and then tailor this to the tenant and their households needs. Utilising the knowledge and experience of the multi-skilled team, Tenants First provide practical solutions and works towards positive sustainable outcomes.

As a result of the support provided additional income of £1.19 million has been received for tenants and contributed to 94% tenants sustaining their tenancy during their first year with this support.

Our Hardship Fund has been used to help tenants and their families with things like energy bills, food and shopping making a real difference to people's lives.

In the last 12 months the team have helped tenants and their families with:



2.2 Case Study - Lesters Story

Previously homeless and unemployed, Lester was supported by the team. We are proud he is now living and working in Barnsley and is happy and settled in his new job and home. Click here [QR code here](#) to watch Lester's story.

Our ACHIEVE programme continued to help and support tenants who were unemployed or not in education or training, during 2023. It helped them to overcome barriers, access education or training and give them the skills and confidence to move closer towards the labour market. The programme, delivered by our Tenants First team in partnership with Barnsley Council's Employment and Skills team, ended in December 2023. In the last year we helped: -



We are proud that our apprenticeship programme has a strong track record of building a better future for local people. We currently employ 22 apprentices including 5 apprentices through Enable Futures. Three of our apprentices secured employment with us. We also work closely with Barnsley college and have hosted 9 T level students across different areas of the business.

Working across the Borough, our frontline housing management teams were restructured to increase the number of staff working with tenants and developed a specialist Anti-Social Behaviour (ASB) team. We let 744 homes during the year and worked with local tenants and residents to provide support and advice.

Our income team worked hard last year resulting in a rent collection rate of over 96%, in a year when those tenants moving to universal credit increased to 6108 from 5843 in the previous year.

2.3 Repairs and Investment in Homes

One of the most important services we provide is the repairs and improvements service, where we continue to spend a large proportion of our budgets, in line with agreed priorities it within the HRA budget investing in our homes.



Reacting to responsive repairs is an important part of the service, improving the condition of homes through investment and energy efficiency works reduces energy usage and repair costs longer term.

As part of our Barnsley Homes improvement programmes in 2023/4, we piloted additional works to improve energy efficiency and to help achieve EPC level C. This was complemented by Social Housing Decarbonisation Funding (SHDF) secured by the Council to deliver further retrofit measures to our stock.

In total energy efficiency works were completed to over 1000 homes, reducing energy use and reducing energy bills for tenants.



We also completed Barnsley Homes works to 1275 homes, investing £11.4 million into improving the condition of council homes in Barnsley.



During 2023/24 we worked with 1345 tenants to ensure they had the adaptations they required to remain in their homes. In total 920 minor adaptations were completed (handrails etc) and 425 major adaptations, including ramps and level access shower rooms.

3. Section 3 - Performance 2023/24

Berneslai Homes' performance is measured so that we can monitor the success of our Strategic Plan commitments, consider how well areas of the business are doing and see the difference we are making to our customers. On a quarterly basis a report showing company performance against the suite of KPIs is scrutinised at Customer Services Committee and subsequently reported to our Board and the Council.

We have 43 KPIs for 2023/24, they are segmented into the TSM Pulse, the Council Pulse, and the Company Pulse. Performance is red/amber/green (RAG) rated against annual targets. We also compare our performance against national benchmarks using Housemark data.

Challenging targets are set annually with the Council. At 2023/24-year end performance for 12 KPIs were reported as green (met or exceeded target), seven KPIs were rated as amber (narrowly missed the annual target) and 20 KPIs were rated as red (target not achieved). Four KPIs were not RAG rated due to benchmarking data not yet being received.

3.1 Performance areas of strength

- Building safety: we have 100% compliance against all five of the building safety TSMs (gas, fire, asbestos, water, and lift safety). We achieved 100% compliance for all building safety measures in three out of the four quarters of 2023/24.
- Apprentices: 3.64% of the workforce were apprentices this is 22 apprentices including 5 displaced apprentices and performance is rated as green against the target of 3%.
- Income: In 2023/24 we collected £79.8M of rent, 96.25% of rent due.
- Hardship fund: there were 1,521 successful Hardship Fund applications in 2023/24 (well over double the target of 666) with over £489,000 awarded to tenants.

Our performance in comparison with others is strong and the report includes benchmarks taken from the Housemark mid- year benchmarking report. Berneslai Homes are a low cost high performing when compared to others. For example, although rated as red TP01 Tenant satisfaction, TP03 Time taken to complete recent repair, TP04 Well maintained home and RP02 non-emergency repairs are in line with other high performing organisations.

As an organisation we strive to do the best for Barnsley, but it is important we also understand performance across the sector. The KPIs have been reviewed for 2024/25 and these are now set in line with Housemark upper quartile benchmarks or higher if performance exceeded this.

Key areas of focus for the year where we have looked to improve our performance include complaints, ensuring we respond effectively and within agreed timescales and minimising rental loss from empty homes.

The full summary of our performance against the council KPI's including Tenant Satisfaction Measures (TSMs) is attached at Appendix B.

3.2 Value for Money and Efficiencies

It is important that Berneslai Homes offers value for money, and we work hard to manage our finances carefully. Value for money is embedded in everything we do. Obtaining the best outcome for tenants within available resources, is the key to achieving value for money.

During 2023/24 working with the Council, we invested £30.3M Improving homes and a total of £24.1M on repairs and servicing.

We used the £14 M management fee from the Council to manage services (e.g.: tenant involvement, tenancy management, supporting people, income collection

Over £1M of recurrent annual savings were identified and actioned with a further £87k of one-off savings. As a result, the target of 1% management fee savings were achieved.

3.3 Annual Business Action Plan 23/24

The Annual Business Action Plan was agreed by Board in December 2022 and Cabinet in February 2023 for the period 1st April 2023 to 31st March 2024.

The actions agreed support Berneslai Homes' Strategic Plan and align to the Barnsley 2030 vision. This ensures that Berneslai Homes objectives continue to support the council and its residents and the overarching priorities of Barnsley 2030. The Action Plan and priorities were discussed with some of our customers at our Customer Panel and more broadly whilst we were out on estates through our engagement team as part of the annual planning process of the strategic plan. Their feedback made sure we are concentrating on the key areas that help to support tenants and are listening to their concerns.



Of the 21 actions agreed all were completed or partially completed (5 partial)

Significant progress has been made against the Annual Business Action Plan for 2023/24, with a real focus on working with tenants, preparing for new regulatory requirements, helping tenants with money matters, support into training and employment and improving systems and processes to improve services for tenants.

Berneslai Homes has also been responsive to new regulatory compliance and worked closely with the council to ensure we are regulation ready.

The Annual Business Action Plan progress is included within the performance report and an overarching summary is attached at Appendix C.

4. SECTION 4 - CUSTOMER INSIGHT & ENGAGEMENT

We have engaged with almost 10,000 of our tenants during 2023/24, gaining their feedback in a range of ways. Our customer engagement team have continued to be visible in our communities increasing our engagement tours. The team held important face to face conversations with tenants that would not usually engage with us. All the feedback is being used to develop local area action plans, to make improvements.

We have held 14 engagement events in communities with 222 people attending, we have held 43 customer feedback events with our panel of involved tenants and from our STAR survey to 4000 tenants we received 1891 responses. We also gain valuable insight and feedback from our tenants via our regular surveys, and our customer services feedback calls, this was a total of 7487 during the last financial year.



5. SECTION 5 - THE DIFFERENCE WE MAKE TOGETHER

5.1 Partnership Working

Working in Barnsley we benefit from a wide range of strong partnership arrangements that assist us in the delivery of effective services. We are a member of the Barnsley 2030 Board and link into the delivery of the 2030 ambitions for the Borough.

We have an established, effective approach to Community Safety in Barnsley from strategy to service delivery. We are represented on the Safer Barnsley Partnership (SBP); the statutory partnership responsible for tackling crime, reducing harm, protecting vulnerable people, and reducing reoffending. The [Safer Barnsley Partnership Plan](#) aligns with the legal requirement, priorities and aspirations outlined in the [South Yorkshire Police and Crime Plan](#), which makes sure a collective approach to achieving the best possible outcomes for and in partnership with our communities.

We are an established partner on the Safer Barnsley Partnership (SBP); the statutory partnership responsible for tackling crime, reducing harm, protecting vulnerable people, and reducing reoffending. The [Safer Barnsley Partnership Plan](#) aligns with the legal requirement, priorities and aspirations outlined in the [South Yorkshire Police and Crime Plan](#), which makes sure a collective approach to achieving the best possible outcomes for and in partnership with our communities.

We are also represented on a number of other key strategic and operations groups including:

- Domestic Abuse Partnership
 - [Children's Safeguarding Board](#)
 - [Adults Safeguarding Board](#)
 - DHR / SAR Executive Panel
- MARAC (Multi-Agency Risk Assessment Conference)
- MAPPA (Multi Agency Public Protection Arrangements)
- MACE (Multi-Agency Child Exploitation) Panel

Our dedicated ASB team, work in partnership with the Council's Safer Neighbourhood Service and South Yorkshire Police to deal with ASB effectively across the borough. The team address and manage community tensions that ASB, crime, and nuisance can cause so tenants can live in their home without stress and fear.



We work closely with Barnsley College, and as well as the T level placements at Berneslai Homes, we have also offered supported placements, these placements are designed to give individuals some exposure to the work environment and for them to undertake general tasks with support of their mentor.

Berneslai Homes' academy has now officially opened at the CUBE building at the Honeywell site of Barnsley college. The academies are employer-led partnerships that give students access to more high-quality education and training, with more opportunities to experience the world of work. Providing students with a clear flight path to see a rewarding career ahead with Berneslai Homes, it takes our everyday environment and brings it into the College, so students get to live and breathe our values, and are in an accelerated position of understanding to step into the world of work.

5.2 Working with tenants

Our teams are passionate about working with tenants to listen and respond to the tenant voice. This is essential so we can deliver and develop services that are accessible, high quality and fair. Our team of amazing tenant volunteers constantly challenge us.

The Tenant Scrutiny Panel reviewed our adaptations service, and their report has several recommendations for improvement which we are now working to deliver.

Keeping tenants safe –The Building Fire Safety Residents Panel assisted with the bin chutes closure in all three high rise buildings; supporting tenants in receiving the sprinkler system installation in their properties; and helping address ASB issues around waste collection and unauthorised access to the buildings. This resulted in an 'Action Day' in partnership with South Yorkshire Police and South Yorkshire Fire Service.

Service Excellence Assessment Programme (SEAP) - We have a number of SEAP assessors registered as part of our involved tenant pool. SEAP assessors work with us on an ad-hoc basis in a 'mystery shopper' capacity. Over the last 12 months we have been working together with SEAP Assessors to review how we carry out 'empty property spot checks including procedures, paperwork and responsibilities. The review will help us to ensure that we are more efficient and improve the service for future Berneslai Homes tenants.

TVP – Our Tenant Voice Panel have attended 43 meetings over the last year to give their thoughts and views on a range of issues, policies and strategies that affect tenants.



Engaged tenants form part of our recruitment and selection panels including Executive Director of Resources, Lettings Manager and ASB Team Leader.

TARAs - we have five Tenants and Residents Associations (TARAs). They continue to offer the more traditional methods of engagement. They do a brilliant job providing information, support, and work on bespoke projects. This supports Berneslai Homes and benefits the local community.

5.3 Working in the community

We have increased the number of staff volunteering days to 4 days per employee (pro rata) and we have also established our Can-Do crew.

Can do crew - This exciting initiative empowers our staff to give back to the local community to benefit tenants and residents in the Barnsley area. Staff are encouraged to use the volunteering and team away days to undertake activities as individuals or with others. Last year we completed the makeover at three of our community centres. We transformed three warm and welcoming spaces at Honeywell, Kirk View and Maltas Court. Thanks to teams of 32 volunteers from across Berneslai Homes, supported by seven local businesses.

6. SECTION 6 - LEARNING ORGANISATION

Berneslai Homes is a learning organisation, using our values of can do and curious to learn from others both within and outside the housing sector. We work with a wide range of organisations to ensure we use best practice to improve our services, including DIN (Disruptive Innovators Network), TPAS, Housing Diversity Network National Federation of ALMOs, National Housing Federation, WISH, HQN and Housemark.

6.1 Learning from Complaints

Last year we were pleased to receive the Housemark accreditation for our complaints handling service and we remained compliant with the Housing Ombudsman Service Complaint Handling Code. We promoted to tenants how to complain and encouraged contact. During the year we had 692 stage 1 complaints and 133 stage 2 complaints.

The main reasons for complaints were the long wait times for planned repairs and replacements and our ability to effectively communicate with tenants. As a result of feedback, we worked with tenants to improve letters and communication. We have worked with all staff on training and improvements in services.

6.2 Inclusive

We are committed to working with our tenants to create more cohesive and inclusive communities. We work with tenants to understand their circumstances and adapt our services to meet their individual needs. We offer and provide support where required through our Tenants First and other teams across the organisation.

We are committed to be an inclusive employer and support people with all kinds of differences. Our goal is to make employees feel comfortable asking for what they need. We recognise the importance of valuing each individual employees' distinct abilities and specific contributions and we are proactive about the diversity of our customers so we can provide the right services and meet the right needs and aspirations of our tenants.

All our staff have attended Equality Diversity and Inclusion (EDI) refresher training, our Board has shown their commitment to EDI, and we now have a Board member EDI champion. We were awarded the HDN ED&I accreditation. As our commitment to this we offer all new Board members the HDN mentoring & Board support programme. We are proud to be a supportive and inclusive organisation.

7. SECTION 7 - AREAS FOR IMPROVEMENT

We have identified several areas for improvement during 2024/25:-

Area for Improvement	Action Required	Timescale
Backlog of Repairs 3554 outstanding repairs £11M works	Deliver Plan for 2024/5 Reduction in investment works Increase in responsive repairs budget Understand reasons for backlog (inflation & increased tenant demand)	February 2024 (HRA budget approved at Cabinet Feb 2024) June 2024
Communication with Tenants	Revised letters to tenants awaiting backlog works. Introduce texting to tenants as part of new IT system.	April 2024 February 2024
Complaints handling	Increased resources to respond to complaints	April 2024
	Training for staff on complaints handling	April 2024 onwards
	Improved complaints reporting with BMBC	May 2024
	Board and Council champions appointed	June 2024
Listening & Hearing Tenants	Develop new Customer First Training	July 2024
	New Customer Insight and Engagement Strategy - Introducing additional engagement opportunities	July 2024

Area for Improvement	Action Required	Timescale
Listening & Hearing Tenants (cont)	Customer Conference	Early 2025
	Co design pilot	Sept 2024
	Further joint to review the ASB policy and escalation processes between Berneslai Homes and the Council as part of the action plan to improve tenant satisfaction with the handling of ASB across our neighbourhoods.	December 24
Maximising Income	Reducing the number of empty homes and relet times	April 2024 onwards



8. SECTION 8 - FUTURE CHALLENGES

During 2023/24 there have been significant increases in the demands for services and regulatory requirements. Like many local authorities the ever increasing demands on the Housing Revenue Account is leading to severe pressures.

Together with BMBC we will work locally to be as efficient as possible and work nationally to lobby for additional funding to meet the costs of energy efficient homes (EPC C), regulatory requirements of Awaab's Law and Decent Homes #2, build and acquire new homes and offset the impact of the RTB.

We will ensure our staff are appropriately trained and will meet the forthcoming Regulatory requirements of the professionalism agenda.

We will work together with the Council, tenants and partners to continue to provide the best service possible and create great homes and communities in Barnsley.

Year End Performance Report 2023/2024



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GREAT PLACE

Annual Indicator  Tenant Satisfaction with Repairs	Annual Indicator  Time Taken Recent Repair	Annual Indicator  Satisfaction Home is Safe	 Gas Safety Checks
Annual Indicator  Well Maintained Home	 DHS Compliance	 Fire Safety Checks	 Asbestos Safety Checks
 Emergency Repairs	 Non-Emergency Repairs	 Water Safety Checks	 Lift Safety Checks
Annual Indicator  Positive Contribution to Neighbourhoods	Annual Indicator  Satisfaction with Communal Areas	Annual Indicator  Satisfaction with Handling ASB	 ASB Cases

HEADLINES

We were 100% compliant across the five Building Safety TSMs



ASB Cases Hate Incidents

GREAT PEOPLE

Annual Indicator  Tenant Satisfaction	Annual Indicator  Listening to Tenants
Annual Indicator  Keeping Tenants Informed	Annual Indicator  Treating Tenants Fairly
Annual Indicator  Handling Complaint	 Stage One Complaints
 Stage Two Complaints	 Stage One Response Time
 Stage Two Response Time	

GREAT PLACE

		YEAR END 22/23*	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24	BENCH MARK**	
Annual Indicator	Annual Indicator	83.1%	75.1%					83.1%	76.0%	TP02: Tenant Satisfaction with Repairs
Tenant Satisfaction with Repairs	Time Taken Recent Repair		75.5%					80.4%	71.0%	TP03: Time Taken Recent Repair
Annual Indicator	Annual Indicator		73.8%					82%	73.8%	TP04: Well Maintained Home
Well Maintained Home	DHS Compliance		Measured at the start and end of the year					0%	0%	RP01: DHS Compliance
Emergency Repairs	Non-Emergency Repairs	0.33%	0.33%			0.09%	0.09%			Homes that do not meet the Decent Homes Standard
Annual Indicator	Annual Indicator	100%	99.95%	99.70%	99.90%	94.34%	94.34%	99.5%	98.9%	RP02 2: Emergency Repairs
Positive Contribution to Neighbourhoods	Satisfaction with Communal Areas		96.74%	96.16%	96.51%	94.07%	94.07%	99.5%	95.5%	RP02 1: Non-Emergency Repairs
			59.6%					62%	64.0%	TP11: Positive Contribution
			65.9%					66%	66.0%	TP10: Satisfaction with Communal Areas

*22/23 Year end performance was assessed based on whether a target was achieved (denoted by green formatting) or missed (denoted by red formatting)

**Benchmark is based on peer group upper quartile

GREAT PLACE

Annual Indicator



Satisfaction Home is Safe



Gas Safety Checks



Fire Safety Checks



Asbestos Safety Checks



Water Safety Checks



Lift Safety Checks

Annual Indicator



Satisfaction with Handling ASB



ASB Cases



ASB Cases Hate Incidents

YEAR END 22/23*	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24	BENCH MARK**	
83.4%	74.9%					83%	77.0%	TP05: Home is Safe Satisfaction that the home is safe
100%	100%	100%	100%	100%	100%	100%		BS01: Gas Gas safety checks
100%	100%	100%	100%	100%	100%	100%		BS02: Fire Fire safety checks
100%	100%	100%	100%	100%	100%	100%		BS03: Asbestos Asbestos safety checks
99.29%	99.64%	100%	100%	100%	100%	100%		BS04: Water Water safety checks
100%	64.92%	100%	100%	100%	100%	100%		BS05: Lift Lift safety checks
60.1%	48.4%					60%	55.0%	TP12: Satisfaction Handling ASB Satisfaction with the landlords approach to handling anti-social behaviour
39.54	10.46	24.04	33.39	46.36	46.36	In line with peer group median	30.38 Q2 peer group median	NM01 1: ASB Cases Anti-social behaviour cases
0.44	0.22	0.5	0.5	0.5	0.5	In line with peer group median	0.72 Q2 peer group median	NM01 2: ASB Cases Hate Incidents Anti-social behaviour cases that involve hate incidents

GREAT PEOPLE

YEAR END 22/23*	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24	BENCH MARK**
84.2%	76.8%					84%	76.0%
68.1%	59.6%					68%	61.0%
70.6%	64.4%					71%	68.0%
85.3%	76.9%					85%	80.8%
New	43.1%					62%	31.0%
New	9.35	19.48	29.94	39.63	39.63	In line with peer group median	19.14 Q2 peer group median
New	1.56	3.01	5.51	7.57	7.57	In line with peer group median	2.17 Q2 peer group median
New	88.08%	83.15%	77.40%	74.02%	74.02%	90%	85.0%
New	100%	96.72%	97.89%	96.32%	96.32%	90%	91.0%

TP01: Tenant Satisfaction
Overall satisfaction

TP06: Listening to Tenants
Landlord listens to tenants views and acts upon them

TP07: Keeping Tenants Informed
Landlord keeps tenants informed about things that matter to them

TP08: Treating Tenants Fairly
Landlord treats tenants fairly and with respect

TP09: Satisfaction Handling Complaints
Satisfaction with the landlords approach to handling complaints

CH01 1: Stage One Complaints
Stage one complaints relative to the size of the landlord

CH01 2: Stage Two Complaints
Stage two complaints relative to the size of the landlord

CH02 1: Stage One Response Time
Stage one complaints response time

CH02 2: Stage Two Response Time
Stage two complaints response time

 Annual Indicator Tenant Satisfaction	 Annual Indicator Listening to Tenants
 Annual Indicator Keeping Tenants Informed	 Annual Indicator Treating Tenants Fairly
 Annual Indicator Handling Complaint	 Stage One Complaints
 Stage Two Complaints	 Stage One Response Time
 Stage Two Response Time	

GREAT PLACE



EPC C or Above

HEADLINES

39.34% of properties had an EPC C or above against a target of 40%

GREAT PEOPLE



Proportion of Apprentices

HEADLINES

3.64% of the workforce were apprentices which exceeds the 3% target.

GREAT COMPANY



Void Rent Loss



Rent Collection



Bamsley Pound



Annual indicator

Management Fee Efficiency Target

Annual Indicator



TSM Targets

HEADLINES

96.25% of rent was collected against a target of 97%.

GREAT PLACE

YEAR END 22/23*	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24
34.76%	36.28%	38.72%	38.67%	39.34%	39.34%	40%

EPC Ratings (BH5)
Percentage of Properties with an EPC C or above.



EPC C or Above

*22/23 year end performance was assessed based on whether a target was achieved (denoted by green formatting) or missed (denoted by red formatting)

GREAT PEOPLE

YEAR END 22/23*	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24	
3.25%	2.93%	3.66%	3.66%	3.64%	3.64%	3%	Apprentices (BH3) Proportion of apprentices in workforce



Proportion of Apprentices

*22/23 year end performance was assessed based on whether a target was achieved (denoted by green formatting) or missed (denoted by red formatting)

GREAT COMPANY		YEAR END 22/23*	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24	
 Void Rent Loss	 Rent Collection	0.76%	1.31%	1.24%	1.27%	1.56%	1.56%	1.05%	Void Rent Loss (BH1) Income lost due to void properties
		96.06%	94.87%	95.37%	96.47%	96.25%	96.25%	97%	Rent collection (BH2) Rent collected as a proportion of rents owed on Housing Revenue Account dwellings.
 Bamsley Pound	Annual Indicator  Management Fee Efficiency Target	66.21%	65%	67%	67%	66%	66%	75%	Local Spend (BH4) Spend funds locally supporting the Bamsley economy.
		Achieved	Achieved					1%	Management Fee (BH6) Management Fee Efficiency target as part of annual Value For Money report.
Annual Indicator  TSM Targets		New	0%					100%	TSM Targets (BH7) Meet all TSM satisfaction targets

*22/23 year end performance was assessed based on whether a target was achieved (denoted by green formatting) or missed (denoted by red formatting)

GREAT PLACE



Right First Time

HEADLINES

At year end 74.46% of tenants felt responsive repairs were completed right first time against a target of 82%.

GREAT PEOPLE

Annual Indicator



Staff Satisfaction



Staff Attendance



Equality Act



Minority Ethnic



HF Awarded



HF Supported

HEADLINES

1,521 Hardship Fund applications were approved in 2023/24 against an annual target of 666.

GREAT COMPANY

Annual Indicator



Net Promoter



Current Tenant Arrears



Contact Centre

HEADLINES

73.53% of priority calls were answered in the target timescale of 3 minutes or less.

GREAT PLACE

YEAR END 22/23	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24
78.30%	70.70%	73.90%	74.07%	74.46%	74.46%	82%

Keeping properties in good repair (KPI 1)
Responsive repairs right first time.



Right First Time

GREAT PEOPLE		YEAR END 22/23	Q1	Q2	Q3	Q4	YEAR END 23/24	TARGET 23/24	
Annual Indicator  Staff Satisfaction	 Staff Attendance	68%	48%				68%	Staff Satisfaction (KPI 2) Employee satisfaction rate. My organisation is a great place to work.	
 Equality Act	 Minority Ethnic	12.12	14.28	12.20	12.01	12.39	12.39	9 days	Staff Attendance (KPI 3) Average number of days absent per full time equivalent employee.
 Equality Act	 Minority Ethnic	5.77%	4.77%	4.39%	4.76%	4.74%	4.74%	8%	Diversity (KPI 4) Percentage of staff defining under the Equality Act definition of disability.
 Equality Act	 Minority Ethnic	2.69%	2.56%	2.38%	2.75%	3.10%	3.10%	2.7%	Diversity (KPI 5) Percentage of minority ethnic staff in total workforce.
 HF Awarded	 HF Supported	New	57,872	136,937	266,753	489,699	489,699	£500k	HF Awarded (KPI 9) Hardship Fund awarded to tenants.
 HF Awarded	 HF Supported	New	268	550	942	1,521	1,521	666	HF Supported (KPI 10) Hardship Fund No. of successful applications.

GREAT COMPANY

Annual Indicator



Net Promoter

YEAR
END
22/23

Q1

Q2

Q3

Q4

YEAR
END
23/24

TARGET
23/24

BENCH
MARK**

34.60

20.00

>34

20.4

Net Promoter (KPI 6)

Likely to recommend Berneslai Homes.

3.51%

3.74%

3.87%

3.38%

3.74%

3.74%

3.5%

Current Tenant Arrears (KPI 7)

Percentage of Current Tenant Arrears.



Current Tenant Arrears

65.03%

91.57%

78.08%

83.39%

25.36%

73.53%

80%

Contact Centre (KPI 8)

We will answer priority calls in less than 3 minutes (Contact Centre).



Contact Centre

Barnsley 2030 objective	Priority	Strategic Ambition	Key Milestones	Date	BH Lead and additional resources	Q1	Q2	Q3	Q4
Corporate Priorities									
Healthy Barnsley	Ensure we have resources to deliver our strategic plan and provide value for money	Growth	1) Implement restructure across organisation. 2) Review of Admin teams, PMO's and IT. 3) Review success of restructure.	1) Apr 2023 2) Jul 2023 3) Mar 2024	Executive Management Team.	30/6 company restructure in place - complete 30/6 Admin and Planned Maintenance Officer review complete. IT review to be undertaken by end of Dec 23.	IT review to run alongside implementation of Repairs First and once Business as usual determined.	10/1/24 IT review to run alongside implementation of Repairs First and once Business as Usual determined.	31/3/24 Temporary structure for phase 2 to be agreed by BH Executive Management Team. Structure for next 18 months complete.
	Cost of living- minimising hardships for staff and tenants	Hearing Tenants	1) Deliver BH Hardship Fund and evaluate impact.	1) Dec 2023	Executive Management Team.	30/6 23/24 fund in place (£500k). Cost of Living Champion role out to advert closing 9/6/23. Monitoring and evaluation underway.	14/9 Cost of Living Champion in place. Close monitoring of spend and action plan in place including Home from Home winter initiative		31/3/24 Fund closed, spend on target and evaluation complete
Growing Barnsley	Maximising Income	Growth	1) Working in partnership with BMBC looking at Service Charges 2) De-pooling of rents 3) Maximising income for Construction	Throughout 2023/24	Executive Management Team.	30/6 Service Charge Review led by the Council. Scope of the review agreed. HQN appointed and review commenced.	4/9 BH Income Manager in place; tasked with leading recovery plan to improve performance.	18/1 - Embedding change to work flow within team. Options to implement software to increase and automate outbound contact to drive up collection rates underway	31/3/24 Initial scoping meeting with Council re service charge review. Voicescape Software commissioned, implementation due October 24.
Healthy Barnsley	Customers voices are heard in our Governance arrangements.	Hearing Tenants	1) Develop overall approach for Board to hear the tenants voice – using best practice. 2) Ensure Board have ownership of the trends from complaints and learn from customer journey mapping. 3) Board use opportunities to meet and discuss services with tenants. 4) Board set the culture and develop culture changes for all staff.	1) Oct 2023 2) Apr 2023 3) Oct 2023 4) Oct 2023	Executive Director Corporate Services. Board Champion	30/6 Work has commenced in this area, including Away day arranged to discuss Sep 23 with TPAS, voids and estate tour for Board members, tenants voice included in all Board and Committee reports. 30/6 Complaints deep dive and journey mapping taken place at CS Committee and regular reports and discussions held at every committee–complete. 30/6 New Board member newsletter identifying opportunities for Board to meet with staff and residents. 30/6 Away day Sep 23.	14/9 - Customer Services committee to meet in community bases and extend opportunity for involved and local tenants to pre-meet. 14/9 TVP reps meet direct with BMBC (Strategic ALMO Meeting) 14/9 Accessible summary of committee and board meeting versions to be developed for Q3	18/1/24 commenced summaries from Committees and Making improvements to Board pages to provide more information for customers. 18/1/24 New Board Chair taking a lead role in attending local events and customer events.	31/3/24 Committee summaries in place and improvement to Board pages. Community events and customer events continue to be advertised to Board via Board newsletter and increased local presence of new chair. Now Business as usual.
	Modernisation of Services.	Technology and Innovation	1) Deliver Repairs IT project including Dynamic Resource scheduling.	Phase 1 Apr 2023 Phase 2 Jul/Aug 2023	Executive Director of Corporate Services and One Consulting.	30/6 Delay agreed to early 2024 regular updates provided to BMBC and BH Board, as project progresses.	Go live date of Jan 24	10/1/24 Go live date 31/1/24 phase 1	31/3/24 Repairs First went live 15/2/24. Currently bedding phase 1 in and started planning for phase 2 which is in 24/25 business action plan.
	Respond to new consumer regulatory standards and framework	Hearing Tenants	1) To be determined following issuing of new standards by the Regulator of Social Housing. 2) Ensure we can report on the new standards to BMBC to enable them to fulfil their landlord responsibilities.	1) Phase 1 Apr 2023 2) Phase 2 Apr 2023	Executive Director Customer and Estate Services.	17/7 - New standards not released yet. 17/7 - HQN self assessment tool to be used and completed by 30/9/23 17/7 to complete self assessment by 30/9/23	14/9 - All leads progressing well on SA's. Regulatory Board set up to include BMBC and tenant rep. Full schedule of SA presentations scheduled for Oct. 14/9 - Customer panel 21/9 focussing on regulation 14/9 - HQN attending bespoke session with EMT	18/1 Regulation Action plan reviewed and resource/financial impact currently underway. Still awaiting final version of Consumer Standards from RSH. Session with TVP to agree actions 23/1 Plan developed to raise awareness amongst members/board and wide staff Key action plan being developed to respond to an Inspection Call	Feb 24 - Regulation Ready sessions delivered to Leadership Forum and BMBC Elected Members. BMBC Cabinet and BH Customer Service Committee received update on regulation preparation and progress against action plan. Apr 24 - Commenced self assessment against published consumer standards, and spot checking of evidence. Good progress being made against actions.
	Embrace and embed the new professionalism standards for all Social Housing providers.	Employment and Training/ Hearing Tenants	1) Assess standards once published (core competencies v new standards). 2) Update employee specifications and PDR form in line with standards. 3) Identify and implement any training requirements including develop a management development program. 4) Undertake pilot Professional Passport in Housing Management.	1-3) Dec 2023 (pending publication of professionalism standards) 4) Jun 2023	Executive Director of Corporate Services.	30/6 Professional Passport in Neighbourhood Team commencing Jun 2023 (Kingdom Academy)	4/9 Housing Professional Passport commenced across Neighbourhoods. 18/09 The core competencies and standards have not officially been published but are expected later this year. The current guidance has been interpreted. Monthly gov.uk updates are being closed followed. 18/09 A review has been undertake to identify all managers believed to be in scope and the qualifications they hold. Training providers to be identified for those who do not hold the recognised qualification.	15/12 Delay in publication of the standards, now not expected to be until end of 2024. Work will continue on the wider aspects of competency and conduct and preparation for professionalism. 08/01/24: Update report to go to EMT on 09/01. Professionalism to be included as a topic at Feb Leadership Development session.	02/24 Job Descriptions and Employee Specs amended (where applicable) to reflect the professionalism requirements 02/24 Two leadership team briefing sessions held to provide an update on competency and conduct standard 03/24 Drop in sessions held for those potentially in scope for the qualification element of the standard 26/3/24 BH response submitted to consultation on Competency & Conduct Standard
Learning Barnsley	Increase skills for the future and to ensure we achieve the ambitions in our Strategic Plan.	Employment and Training	1) Develop our graduate and apprentice opportunities. 2) Creative approach to opportunities and use vacancies to reassess options. 3) Obtain funding to support employment and training.	1) Mar 2024 2) Throughout 23/24 3) Dec 2023	Executive Director of Corporate Services.	30/6 ESF – Council programme linked into.	4/9 - ESF Project manager tasked with identifying possible funding streams to support customers post Dec 2023. 18/09 - Hosting seven displaced Craft Apprentices via Efficiency North 18/09 - All Craft apprenticeship positions assessed when vacancies arise to identify skills gaps	15/12 ESF funding has been utilised to access training such as Mental Health First Aid (MHFA) and MHFA Refresher Training	02/24 Graduate in Customer Services recruited and appointed to.
Healthy Barnsley	Improve Customer Satisfaction.	Hearing Tenants	1) Learn from new call handling in-time feedback. 2) Implement new Housing Management Service Model and improvement plan with focus on professionalisation agenda.	1) Sep 2023 2) Apr 2023	Executive Director Customer and Estate Services.	30/6 New 'Neighbourhoods' structure implemented 1 Apr 2023 30/6 Modernisation plan underway and on track. Professional Passport to be undertaken by all Neighbourhoods Staff 23/24	14/9 - Neighbourhoods Structures in place and embedding. HPP commenced.	18/1 Contact Centre in call feedback being analysed. Transaction surveys being developed and annual roll out from Apr 24	Contact Centre SLA reviewed and to be signed off 25/4/24 Full survey plan developed and subject to Customer Services Ctte sign off May 24. Voicescape Software to go live with feedback summer 24
	Increase and broaden customer engagement and feedback	Hearing Tenants	1) Develop Customer Portal. 2) Establish tenant Estate Champions as 'eyes and ears' in community. 3) Establish targeted local engagement plans.	1) 2023/24 2) Jun 2023 3) Dec 2023	Executive Director Customer and Estate Services.	17/7 Commenced	14/9 - demos booked from Engagement IT Platform providers. 14/9 - Transactional Survey Development Plan commenced. 14/9 - series of community engagement tour underway with positive interaction and new tenants signed up to be more involved	18/1 Insight and Engagement Strategy in draft and due for TVP consultation 25/1. Action plan developed. Software options expired and at procurement stage. Meeting held with Tenant Voice Panel and agreed to review the TVP model early 24	Insight and Engagement Strategy and action plans to be approved by Customer Services Ctte May 24 and BMBC Cabinet in Jun 24. Software to go live with transactional surveys summer 24
Growing Barnsley	Implement and embed new lettings Policy.	Growth	1) Implement New Lettings Policy. 2) Establish 1st Annual Lettings Plan. 3) Undertake VFM review of BH approach to use of hotels as Temporary Accommodation. 4) Front-door market-place approach to new Lettings Policy.	1) Apr 2023 2) Apr 2023 3) May 2023 4) Aug 2023	Executive Director Customer and Estate Services.	17/7 - Agreed go live date of Dec 23. Review underway	14/9 - All outbound contact for band reviews now completed. Working through reassessments and on track to complete full review on time. 14/9 - Commenced rebuild of system. 14/9 Lettings Board meeting as scheduled	-	1 Apr 24 - fully live policy. First Annual Lettings Plan agreed for 24/25
Learning Barnsley	200 tenants per annum supported to get ready for work.	Employment & Training	1) Delivery of ESF funded 'Achieve' targets and generating additional profit.	1) Apr to Dec 2023	Executive Director Customer and Estate Services.	30/6 Achieve delivery on target and achieving excellent outcomes. Due to end delivery Dec 2023 upon cessation of ESF funding.	4/9 ESF project on track to meet delivery milestones 14/9 planning for closure of ESF contract (ending Dec 2023)		Commencing new commission 1/4/24. £195k; 150 participants target.
Healthy Barnsley	Meeting Building safety requirement and keeping safety as our number one priority.	Keeping Tenants Safe	1) C365 software to be in place. 2) Comply with the Building Safety Act on the production and compilation of Safety cases. 3) Comply with new Fire Safety Act and ensure actions from this are implemented during 23/24 to ensure compliance.	1) Dec 2023 2) Throughout 2023/24 3) Mar 2024	Executive Director Property Services.	30/6 Successful testing ongoing. 30/6 Safety cases and action plan ready Aug 2023. 30/6 Buildings to be registered Sep 2023 30/6 Completed	15/9 - All on track. Building Safety Compliance performance maintains upper quartile and requirements of the Building Safety Act, Fire Safety Act & Fire Safety Regulations being implemented within agreed target milestones.	1) C365 - All modules built and 4 areas currently live (Electric / Legionella / Lifts / Asbestos). Fire will be live by Jan 24. 2) Complete - Safety Cases produced for all 3 High Rise Buildings and are live documents. 3) Complete	1) C365 - All modules built and currently running live apart from Gas that cannot go live until Repairs First system is fully configured. C365 will run against our current systems to ensure accuracy and fulfil audit requirements until the end of Q4. 2) Complete - Safety Cases produced for all 3 High Rise Buildings and are live documents. 3) Complete
Growing Barnsley	Meeting future requirements of social housing in Barnsley and exploring opportunities externally.	Growth	1) Work with the council on the future of council housing - new build and acquisition during 2023/24.	1) During 2023/24	Executive Director Property Services.	Continue to work with BMBC to see how we can support them with in setting the strategy for the future of council housing.		Working closely with BMBC on two key streams of new acquisitions and new build programs - including the acquisition programme & Afghan re-settlement project. CEO continuing to liaise with BMBC on the future of new build.	Working closely with BMBC on two key streams of new acquisitions and new build programs - RTB reserves acquisition programme & Afghan re-settlement project. CEO continuing to work with BMBC in setting the strategy for the future of council housing.
Healthy Barnsley	Data Quality - ensuring we have up to date and accurate data including our stock conditions, health and safety including damp and mould and tenants vulnerability.	Keeping Tenants Safe	1) Review of current data held. 2) Action Plan to collect data, to ensure accurate and up to date. 3) Collecting appropriate data to increase the accuracy of data held. 4) Arrangements in place to ensure this continues to be accurate and up to date.	1) Apr 2023 2) May 2023 3) Throughout 2023	Executive Management Team Lead	30/6 Complete 30/6 Knowing our customers project underway	14/9 - knowing our customer action plan agreed and project meetings established	18/1/24 Full roll out of Knowing Customer Project deferred to CRM new system go live. Interim actions ongoing.	14/04 Stock condition survey and EPC data position 84% and 78%.

Barnsley 2030 objective	Priority	Strategic Ambition	Key Milestones	Date	BH Lead and additional resources	Q1	Q2	Q3	Q4
Sustainable Barnsley	Installation of renewable technology, carbon reduction initiatives across the stock and business.	Zero carbon	1) Deliver 1000 solar PV working with BMBC and Energise Barnsley. 2) Use Social Housing Decarbonisation Fund (SHDF) for fabric first improvements 3) Develop plan for Energy Performance Certificates (EPC) C by 2030. 4) Reskill sessions for existing staff for retrofit opportunities.	1) Jan 2024 2) Mar 2024 3) Mar 2024 4) Mar 2024	Executive Director Property Services.	30/6 Ongoing consultation between BH/BMBC/EB Ltd. Indicative project start date Sep 2023 30/6 SHDF Wave 1 (approx. 90 properties) and 2.1 (approx. 150 properties) to delivering fabric first "retrofit" improvements 30/6 EPC C retrofit kickstart BH/BMBC cabinet report developed to agree approach – project pilot via PRIP in year 1 30/6 Retrofit awareness, adviser and assessor training/qualifications currently being undertaken	04/9 Project likely to start now in Q3. EB Ltd to provide revised procurement and project programme. 04/9 SHDF Wave 1 (approx 70 properties) to be completed Sep 23. Wave 2.1 commencing in Oct/Nov 23. 04/9 EPC C retrofit pilot commenced with Task Group monitoring progress. Compliant PAS2035 designs currently being undertaken to allow for contract partners to produce GMP for the pilot project. 04/9 Ongoing Retrofit qualifications for relevant employees. Project Liaison Officers now retrofit adviser qualified. Capital Projects Officers completed Domestic Energy Assessor qualification, which now allows them to complete Retrofit Assessor quals.	04/01 Project installation commencement May 24 - complete Aug 25. 04/01 SHDF Wave 1 (approx. 70 properties) completed Dec 23. Wave 2.1 (approx. 150) commenced Jan 24. 04/01 EPC retrofit pilot Task Group monitoring progress. pilot installation works commenced Jan 24. 04/01 Retrofit quals been undertaken by employees.	Currently installing Internet of things (IOT) devices on the Mapplewell Project. Trialling a new temperature & humidity monitoring device. 14/04 EB 1000 solar PV project expected to start end of Q1 2024/25 14/04 SHDF Wave 1 complete. SHDF Wave 2.1 commenced to conclude Mar 2025 14/04 EPC retrofit pilot task group. 11 properties to be completed for Apr 2024 14/04 - retrofit qualifications ongoing
	Supporting Barnsley and the wider economy and supporting the move to zero carbon.	Zero carbon	1) Develop Fleet vehicle EV Plan. 2) Construction Services successfully accredited to PAS 2030.	1) Apr 2024 2) Jul 2023	1) Depot and transport Manager 2) CS Head of Operations	30/6 Reviewing our plans around new BMBC active travel strategy and charging infrastructure, as well as zero emissions vehicles. 30/6 Update accreditation application submitted Pilot schemes in progress to contribute to learning and development of being accredited to PAS2030	28/09 - Working with BMBC to look at suitable zero carbon vehicles at time of renewal. 28/09 - Awaiting date for accreditation assessment following submission of application to professional body.	19.01.24 - Construction Services have their PAS2030 accreditation audit booked for 24/25 scheduled Jan 2024	11.04.2024 - PAS2030 Audit completed with further information requested. Information submitted awaiting evaluation of this by professional body.
Healthy Barnsley	Modernisation of Construction Services.	Technology and Innovation	1) Embedding of Dynamic Resource Scheduling system to improve efficiencies within Construction Services. 2) New Business Plan for Construction Services to ensure continuous improvement and the development of proposals from this.	1) Jan 2024 – Jun 2024 2) Plan by Apr 2023 – development throughout 2023/24	1) Managing Director Construction Services. 2) Managing Director Construction Services and External specialist input into plan.	30/6 Date changed due to Go live date delayed and reflects 6 month embedding process as per original business case. 30/6 new Business Plan at board for approval Sep 23.	28/09 - Dynamic Resource Scheduling system launch date now Jan 2024. 28/09 - Business Plan Strategy at board for approval	19.01.24 CS preparing for launch and working with all stakeholders to deliver an approach that will be as smooth as possible. 19.01.2024 - Business plan approved .	22.04.2024 - Implementation of Dynamic Resource Scheduling system now live. 22.04.2024 - ongoing improvements to DRS with Managing Director Construction Services for consideration.
Growing Barnsley	Growth of Construction Services.	Growth	1) Construction Services to provide maintenance of PV systems on behalf of Energise Barnsley. 2) Develop and upskill CS to be able to deliver plans around EPC C	1) Mar 2024 2) Mar 2024	1) Head of Operations 2) Head of Operations	30/6 Contract in place and works started, looking at other works through Energise Barnsley 30/6 CS HOS working with all stakeholders to ensure CS are able to deliver works.	28/09 - Agreements in place and now working with Energise Barnsley.	19.01.2024 - SLA in place with Energise Barnsley (for solar Repairs) & BMBC, with CS delivering works 19.09.2024 - Continue to look for other opportunities to continue the growth of Construction Services	22.04.2024 - undertaking works with Energise Barnsley. 19.04.2024 - undergoing review of service with BMBC with private minor adaptations.
Healthy Barnsley	Supporting Barnsley voluntary organisations.	Hearing customers	1) Achieving the Social Value targets in PRIP to spend locally and provide training and employment opportunities	1) Throughout 2023/24	Managing Director Construction Services.	30/6 Monitored throughout the year on a quarterly basis and at year end full report to PRIP core group	28/09 - Various opportunities planned throughout the year to contribute to achieving this outcome	19.01.2024 - Various opportunities planned throughout the year to contribute to achieving this outcome	22.04.2024 - Social value targets recorded, various activities/opportunities to contribute to this.
Healthy Barnsley	Enforcing a proactive approach to damp and mould.	Keeping Tenants Safe	1) Policy Review – Write & Implement a new Policy. 2) Systems (NEC) – Implementation. 3) Comms – New Website Launch / review letters & leaflets / Social Media Campaign. 4) Approach – Move from reactive to proactive. 5) Delivery – Utilise external specialists. 6) Training – Tenants / Front Line Staff / Specialist MSI.	1) Apr 2023 2) Apr 2023 3) Mar 2023 4) Mar 2023 5) Apr 2023 6) Apr 2023	Executive Director Property Services.	30/6 Complete 30/6 Revised date of Jan 2024 30/6 Complete 30/6 Action plan being worked through with task group 30/6 Contract with external provider finalised. External consultants being utilised as required. 30/6 Ongoing via HQN	15/9 - we have a robust policy in place with a proactive approach to managing damp & mould. Recruitment of a dedicated Damp, Mould & Disrepair team is underway. We hold an effective monthly task group with tenant representation and key stakeholder engagement, including BMBC colleagues from public health. We continue to follow government guidance and instil best practice within the organisation.	1) - Complete - Damp Mould & Disrepair Manager reviewing the policy/procedure in line with the 'Awaabs Law Consultation' 2) - Ongoing - Go Live Date 31st Jan24 3) - Complete 4) - Ongoing, we have reduced referrals and number of reactive repairs per property 5) - We have a contractor in place for both Berneslai Homes & Berneslai Homes Construction Services to utilise and are working on implementing a minor works framework for specialist contractors throughout 2024-25 6) - Surveyors have received specialised externally provided Training, all front line employees have also received relevant training. Completed a pilot with tenants via National Open College Network and Efficiency North and are looking at social value funding options to roll this out further in the near future. Following the 'Awaabs Law Enactment', competency will be outlined and more training may be required.	1) - Complete - Damp Mould & Disrepair Manager currently reviewing the policy/procedure in line with the 'Awaabs Law Consultation' 2) Live - still working through the RAID log 3) - Complete 4) - Ongoing, we have reduced referrals and number of reactive repairs per property 5) - We now have contractors that we can utilise for external expertise to complete Damp, Mould & Disrepair related works. 6) - We are looking to procure PCA training for all technical staff to further enhance their knowledge and credentials in relation to damp, mould & disrepair.

Suite	Measure	Description	2023/24 Year End Performance	2023/24 Target	2024/25 Target
TSM Pulse	TP01	Overall satisfaction with the services provided.	76.80%	84% or upper quartile	77%
	BS01	Percentage of homes that have had all the necessary gas safety checks.	100.00%	100%	100%
	BS02	Percentage of homes in buildings that have had all the necessary fire risk assessments.	100.00%	100%	100%
	BS03	Percentage of homes in buildings that have had all the necessary asbestos management surveys or re-inspections.	100.00%	100%	100%
	BS04	Percentage of homes that have had all the necessary legionella risk assessments.	100.00%	100%	100%
	BS05	Percentage of homes in buildings where the communal passenger lifts have had all the necessary safety checks.	100.00%	100%	100%
	TP05	Overall satisfaction that the home is safe.	74.90%	83% or upper quartile	77%
	RP01	Proportion of homes non-decent.	0.09%	0.00%	0%
	RP02 (1)	Proportion of non-emergency repairs completed in landlord's target time.	94.07%	99.50%	96%
	RP02 (2)	Proportion of emergency repairs completed in landlord's published target time.	94.34%	99.50%	99%
	TP02	Satisfaction with overall repairs service. (Only those receiving a repair in last year).	75.1%	83.10%	76%
	TP03	Satisfaction with time taken to complete most recent repair. (Only those receiving a repair in last year).	75.5%	80.4%	76%
	TP04	Satisfaction that the home is well maintained.	73.8%	82.00%	74%
	TP06	Satisfaction that the landlord listens to tenant views and acts upon them.	59.6%	68.00%	61%
	TP07	Satisfaction that the landlord keeps tenants informed about things that matter to them.	64.4%	71.00%	68%
	TP08	Agreement that the landlord treats tenants fairly and with respect.	76.9%	85.00%	81%
	CH01 (1)	Complaints relative to the size of the landlord (Stage 1).	39.63	In line with peer group median	In line with peer group median
	CH01 (2)	Complaints relative to the size of the landlord (Stage 2).	7.57	In line with peer group median	In line with peer group median
	CH02 (1)	Complaints responded to within Complaint Handling Code timescales (Stage 1).	74.02%	90%	100%
	CH02 (2)	Complaints responded to within Complaint Handling Code timescales (Stage 2).	96.32%	90%	100%
TP09	Satisfaction with the landlord's approach to handling complaints (only those making a complaint in last year).	43.1%	62.00%	43%	
NM01 (1)	Anti-social behaviour cases relative to the size of the landlord.	46.36	In line with peer group median	In line with peer group median	
NM01 (2)	Anti-social behaviour cases relative to the size of the landlord (hate related).	0.5	In line with peer group median	In line with peer group median	
TP10	Satisfaction that the landlord keeps communal areas clean and well maintained.	65.9%	66.00%	66%	
TP11	Satisfaction that the landlord makes a positive contribution to neighbourhoods.	59.6%	62.00%	64%	
TP12	Satisfaction with the landlord's approach to handling anti-social behaviour.	48.4%	60.00%	55%	
Council Pulse	BH1	Void rent loss %.	1.56%	1.05%	1.05%
	BH2	Rent collected as a percentage of Total Debit of HRA Dwellings.	96.25%	97.00%	97.00%
	BH3	Proportion of apprentices in workforce.	3.64%	3.00%	4%
	BH4	To spend influenceable funds locally supporting the Barnsley economy.	66%	75.00%	60%
	BH5	Percentage of properties with an EPC C or above.	39.34%	40.00%	45%
	BH6	Management fee efficiency saving.	Achieved	1.00%	1.00%
Company Pulse	KPI1	Employee Satisfaction	48.00%	68%	50.00%
	KPI2	Average number of days sick per employees - monthly projected over year - Company Performance	12.39	9	9
	KPI3	Percentage of staff defining under the Equality Act definition of disability	4.74%	8%	8%
	KPI4	Percentage of minority ethnic staff in total workforce	3.10%	2.70%	3.40%
	KPI5	Likely to recommend Berneslai Homes (Annual)	20	>34	20
	KPI6	Percentage of Current Tenant Arrears	3.74%	3.50%	3.50%
	KPI7	We will answer priority calls in less than 3 minutes (180 seconds)	73.53%	80.00%	80.00%



Appendix C

Progress against 2023/2024 Annual Business Action Plan

During 2023/24 Berneslai Homes have

- Successfully reviewed our structures and implemented changes across the business, including temporary structures to ensure we have the right resources in the right place to deliver for Barnsley. Increasing frontline resources to support tenants on key areas of damp mould and condensation and ASB. Damp Mould and condensation has been a high priority for our tenants, and they have been part of a joint working group to look at this area and from this we have now appointed a damp mould and disrepair team.
- We have successfully delivered the £500k hardship fund and seen 1,521 successful applications to benefit families from this fund across Barnsley, ensuring tenants can sustain their tenancies and keep their homes warm.
- Our Board have spent time hearing our customer voice and opportunities have been publicised to Board to meet our tenants. Our Customer Services Committee now takes place in the community with an opportunity for tenants to come along prior to the meeting and meet our Board. Hearing the customer voice in our governance arrangements has now become business as usual. We are now working with Saville Court tenants to improve their environment and clear paths and improve their garden facilities.
- Our Repairs First project phase 1 including Dynamic Resource Scheduling went live on the 15th of February 2024, and phase 2 to be delivered 24/25. This will improve the repairs service to customers further and introduce an improved online repair booking system. As a result, savings of £1M will be achieved in 2024/5.
- A great deal of work has been carried out to ensure we are regulation ready. A Regulation Board has been in place for several months and consists of officers from Berneslai Homes, BMBC and tenants. A self-evaluation and action plan is in place and progress is monitored by the Regulation Board.

- The professionalism agenda has been embraced by Berneslai Homes and we have amended our Job descriptions where required, leadership briefing sessions have taken place and we responded to the consultation on the competency and consultancy standard. All our Neighbourhood team have completed the housing professional passport. We remain committed to providing a professional service for tenants.
- We have increased our graduate trainees and recently recruited a new graduate to our Customer Services team. We continually review our apprenticeships and now host seven displaced apprentices via efficiency north.
- Our new compliance system, C365 has been launched to improve data and information on the key compliance areas and all our safety cases have been completed and are currently being reviewed by an external company.
- Our Construction Service are now completing works for energise Barnsley through a Service level Agreement and we are undertaking a review of service with BMBC on minor adaptations.
- We have established a new damp, mould and disrepair team, we also have new policy and procedures in place. We have reduced referrals for damp and mould and, we have appointed an external company of experts to complete damp, mould and disrepair related work and we are looking to further train and enhance staff knowledge. Actions will continue during 24/25.

Ongoing

- We have met with BMBC around the service charge review and continue to progress this with them and we have purchased Voicescape a case management that will help us maximise our rent collections with a go live of October 24.
- We are working with BMBC to review our SLA for the contact centre which ensure our published standards are met for tenants accessing our services, we are also working on utilising voicescape for instant feedback surveys at the end of 2024.
- Our Insight and Engagement Strategy has been developed with tenants and will be approved at Board in July 2024. A great deal of work has taken place on knowing our customers, and this will continue into 24/25 with the development of a CRM to ensure we hold accurate up to date information on our tenants.

- Installation of renewable technology, carbon reduction initiative has continued across the stock, we are currently installing verico internet of things devices in Mapplewell working with AICO to trial a new temperature monitoring device. We are also installing 1000 solar pv's, and we have upskilled some of our staff in this important area of work. We are working with tenants to reduce costs by using such technology.



Creating great homes and communities
with the people of Barnsley

Report Title	Berneslai Homes Standard (BHS) - Year End 2023/24	Confidential	No
Report Author	Arturo Gulla – Executive Director of Property Services	Report Status	For Approval
Report To	Board 11/7/2024	Officer Contact Details	arturogulla@berneslaihomes.co.uk

1. Executive Summary

In line with the Regulator for Social Housing Safety and Quality Consumer Standard, Berneslai Homes is required to ensure that homes are good quality, well maintained and safe under their responsibility and meet the standard set out in the Government's Decent Homes Guidance. The Barnsley Homes Standard programme will only serve to improve the Council housing stock with its core aim being to maintain decency.

The Barnsley Homes Standard (BHS) programme 2023/24 consisted of 1275 properties split between Construction Services, Wates (674/400) and one external roofing scheme (201). A total of 3046 elemental components were completed. The average customer satisfaction was 98.31% against a target of 97.5%.

Barnsley Homes Standard 2023/24 programme had a maximum cost agreed at £11.83M.

The anticipated outturn is currently at £10.46M which is a total estimated saving of £0.91M across BHS programme.

Programme	Budget	Gross GMP	Anticipated Outturn	Total Underspend
BHS 2023/24	£11,368,004	£11,825,504	£10,461,344	£906,690

All eleven of the schemes carried out by Construction Services and Wates are now complete. The external roofing scheme is still in progress and scheduled to finish in October 2024. The budget for the scheme is being slipped from 2023/24 into 2024/25.

There has been a continued focus on ventilation across all BHS schemes for 2023/24. 568 Kitchen fans and 291 bathroom fans were installed.

As part of our BHS programmes, Berneslai Homes have included energy efficiency measures to help achieve EPC 'C' on all of our properties by 2030. Within the 2023/24 BHS programme, 17 properties were selected as part of a pilot project where energy efficient measures to achieve an EPC 'C' were completed alongside the decency works on the Wombwell scheme.

The below table shows the Key and Non-Key components that were replaced as part of the BHS 2023/24 Programme;

Component	Total
Kitchens	295
Bathroom/Wetroom	40
Rewires	305
Electrical Upgrade	349
Boiler Upgrade	283
Dry Ridge	15
Dry Hip	8
Dry Verge	59
Chimney Works	49
Loft Insulation	444
Cavity Insulation	13
Damp Treatment	130
External Doors	47
Rainwater Goods	37
Extractor Fans	859
EWI Window Panels	113
Totals	3046

The customer satisfaction for the BHS 2023/24 programme is shown below;

BHS Programme 2023/24	Customer Satisfaction
Quarter 1	99.36%
Quarter 2	100%
Quarter 3	100%
Quarter 4	94.74%
Overall	98.31% (Target 97.50%)

2. Recommendation

That Board approve the BHS outturn reported and refer to BMBC

3. Background

- 3.1 The 2023/24 Barnsley Homes Standard programme (BHS) consisted of 1275 properties across twelve schemes. Five of these schemes have been carried out by Construction Services with a total of 674 properties. 400 properties have been carried out by Wates across six schemes, with the remaining 201 properties on the roofing scheme that are being completed by an external contractor. This scheme is still in progress and is due to complete in October 2024.
- 3.2 The total resource envelope approved by cabinet for the Barnsley Homes Standard programme for 2023/24 was £11.65M. Since the approval it was agreed that £0.2M would be moved into the Repairs and Maintenance budget to support major void works.
- 3.3 The focus of the works is primarily to ensure that properties are maintained to decency standards i.e. kitchens, bathrooms, boiler replacements, electrical rewires. In addition, we look to utilise any of the remaining budget allocation to make improvements to building safety/compliance, energy efficiency and ventilation to homes
- 3.4 In addition to the original scope of works for the BHS programme, works have been transferred from Planned Replacements and Equipment & Adaptations into BHS. This has been where the properties for the replacement works were at the addresses or on the same streets included within the BHS address list. The BHS programme has also assisted the replacements workstream by taking all the one-off kitchen replacements that were awaiting install at the start of the financial year. This has been to assist with other Capital budgets as well as to improve customer satisfaction with improved delivery times.

4. Current Position /Issues for Consideration

- 4.1 As part of the Property Repairs and Improvement Partnership (PRIP), total works costs/Guaranteed Maximum Price (GMP) are agreed for each scheme. The total of all GMP's for BHS 2023/24 was £11.82M which equates to an overspend of £0.39M. However, this was based on 100% of works being completed.
- 4.2 The current anticipated outturn across all schemes, provided by the contract partners is £10.46M which is an anticipated saving against the GMP's of £1.34M. The total anticipated underspend against the budget across BHS is £0.91M.

- 4.3 All eleven of the schemes carried out by Construction Services and Wates are now complete. The roofing scheme is still in progress. This is being completed by an external contractor that was procured via a competitive tender, carried out by Barnsley Property Services. The scheme is on schedule to complete in October 2024. The anticipated spend in 2024/25 has been slipped from the 2023/24 budget.
- 4.4 There has been a continued focus on ventilation across all BHS schemes for 2023/24. It was the aim that every property would have an extractor fan fitted in the kitchen and bathroom where there was no existing fan present, as well as replacing any existing non-operational fans. There has been 568 kitchen fans and 291 bathroom fans installed, which was an 88.92% completion rate on the original number.
- 4.5 With an emphasis around energy efficiency and building safety there has been 113 uPVC window panels added to the Broadway and Honeywell schemes (45/68), that have been replaced with fire rated insulated External Wall Insulation (EWI). There have also been 34 full loft clearances on the Wombwell scheme on properties that were contaminated with asbestos debris.
- 4.6 As part of our BHS programmes we are looking to introduce energy efficiency measures as part of each scheme to help us achieve EPC C on all of our properties by 2030. As part of the 2023/24 BHS programme, 17 properties were selected as part of a pilot project where energy efficient measures to achieve an EPC C were completed alongside the decency works on the Wombwell scheme. This included individual retrofit assessments prior to works commencing in line with PAS 2035.
- 4.7 The below table shows the Key and Non-Key components that were replaced as part of the BHS 2023/24 Programme;

Component	Total
Kitchens	295
Bathroom/Wetroom	40
Rewires	305
Electrical Upgrade	349
Boiler Upgrade	283
Dry Ridge	15
Dry Hip	8
Dry Verge	59
Chimney Works	49
Loft Insulation	444
Cavity Insulation	13
Damp Treatment	130
External Doors	47
Rainwater Goods	37
Extractor Fans	859
EWI Window Panels	113
Totals	3046

4.8 The customer satisfaction for BHS 2023/24 is detailed in the below tables;

BHS Programme 2023/24	Customer Satisfaction
Quarter 1	99.36%
Quarter 2	100%
Quarter 3	100%
Quarter 4	94.74%
Overall	98.41% (Target 97.50%)

Scheme	Customer Satisfaction
Barnsley West (CS)	100%
Broadway (CS)	100%
Cudworth (CS)	93%
Honeywell (CS)	100%
Elemental Kitchens (CS)	80%
Darfield (Wates)	100%
Blacker Hill (Wates)	100%
Hoyland Common (Wates)	100%
Wombwell (Wates)	97%
Elemental Kitchens (Wates)	100%
Overall	98.41% (Target 97.50%)

5. Customer Voice/Impact

- 5.1 Customers were informed the previous financial year that they are part of the following years BHS Programme. Included in this letter they are informed of who will be carrying out the surveys on behalf of the contract partner. They were then kept up to date with the agreed scope of works and programme dates, as well as receiving a pre-works induction and continual support through the duration of works, from our BH Project Liaison Officers and our contract partners. They were then consulted on completion and handover of the works.
- 5.2 All customers receive tenant satisfaction questionnaires following the completion of works. Whilst there was relatively high satisfaction across all the schemes, where dissatisfaction had occurred this has been investigated by the BH project officers and our contract partners. Areas that were investigated were sub-contractor conduct and communication, which was identified to be below standard. This was escalated through our contract partner, who investigated and agreed subsequent action, managing the sub-contractor's performance closely to ensure there are no repeat instances in the future. On our kitchen programme we had some dissatisfaction with communication, and the keeping of appointments with tenants. This was investigated and was deemed to be a

combination of the contract partners and project liaison at fault. Improvements were implemented by introducing a dedicated project liaison officer to the scheme for closer oversight of contractors to ensure any tenant appointments being made were being kept.

6. Risk and Risk Appetite

- 6.1 Timescales – Surveys for the 2023/24 BHS programme commenced earlier than in previous years. Therefore, other than the additional retrofit works and roofing scheme, all schemes finished on time, with the exception of Wates Elemental kitchen scheme that was extended by one month due to contractor issues.
- 6.2 Supply Chain – Labour & material costs were monitored throughout the year using appropriate mechanisms by project and finance teams. This was due to the significant increases across the construction/building sector. The average price per property did remain quite stable throughout the year, with an average GMP price of £9650 across the PRIP schemes.
- 6.3 Financial - There was a small risk to an overspend within the programme due to the cumulative total of the GMP's being agreed at £460k over budget. However, this was monitored closely throughout the year and the later GMP's agreed based on predicted underspends across other schemes, mitigating the risk. The GMP's are based on 100% of works being completed. A further mitigation would have been to reduce the works in the latter end of the year if required, however the savings against the GMP's was around £1.36M by year end.

7. Strategic Alignment

- 7.1 The BHS programme aligns with the BH strategic plan and in some part contributes to all six ambitions. Alongside maintaining decency standards across the stock, it supports the Councils 2030 vision.

8. Data Privacy

- 8.1 This report does not involve the processing of any data.

9. Consumer Regulatory Standards

- 9.1 This report relates to the following elements of the Regulatory Standard:
- 9.2 Safety and Quality Standard – There is a requirement to ensure that homes are well maintained under their responsibility. The aim is to ensure all properties are maintained to the required standard as set by the Decent Homes guidance. The BHS programme will only serve to improve the council housing stock, with its main aim being to maintain decency across the housing stock. Alongside this there are reductions in carbon emissions, increasing energy efficiency and improving building safety. The BHS programme is an approach that utilises strong asset data that is formulated into a comprehensive works package, which allows for the efficient, effective and timely delivery of planned improvements across the housing stock.

9.3 Neighbourhood and Community Standard – There is an obligation to provide the safety of shared spaces for both internal and external areas. As a registered provider we are expected to work cooperatively with tenants, other landlords and relevant organisations to take reasonable steps to ensure the safety of these spaces.

9.4 Transparency, Influence and Accountability Standard – This requires Berneslai Homes to generate and report Tenant Satisfaction Measures (TSMs). Berneslai Homes outturn figures for 2023/24;

- TP02: Satisfaction with repairs **75.1%**
- TP04: Satisfaction that the home is well-maintained **73.8%**
- RP01: Homes that do not meet the Decent Homes Standard **0.09%**
- TP05: Satisfaction that the home is safe **74.9%**
- TP11: Satisfaction that the landlord makes a positive contribution to Neighbourhoods **59.6%**

10. Other Statutory/Regulatory Compliance

10.1 The BHS programme helps to maintain compliance with the Decency Standards as well as building safety requirements such as electrical and gas compliance.

11. Financial

11.1 There are no financial implications arising directly from the progress report.

12. Human Resources and Equality, Diversity and Inclusion

12.1 The programme will endeavour to maintain a fair and equal approach to all tenants and properties, in line with our policies and procedures.

12.2 As part of the BHS process all tenants receive an in-person induction and continued support through the duration of the scheme works from a BH Project Liaison Officer. This allows us to understand a tenant's individual needs and their circumstances in relation to the prospective scheme works. It provides assurance that we are proactively tailoring our service to meet the diverse needs of our tenants by supporting and arranging reasonable adjustments where required to ensure improvement works can be carried out successfully.

13. Sustainability Implications

13.1 This report details how the BHS programme contributes to the zero carbon initiatives.

14. Associated Background Papers

14.1 There are no background papers associated to this report.

15. Appendices

15.1 None.

16. Glossary

16.1 None.



Creating great homes and communities
with the people of Barnsley

Report Title	Value for Money Annual Report 2023-24	Confidential	No
Report Author	Head of Finance	Report Status	For Approval
Report To	Board 11/7/2024	Officer Contact Details	edwardlong@berneslaihomes.co.uk

1. Executive Summary	<p>The attached report sets out the progress and achievements in improving and maximising the value for money offered to the people of Barnsley by Berneslai Homes.</p> <p>The key points to note are:</p> <p><u>Savings</u>: Over £1million per annum of recurrent financial savings delivered since 2022, including:</p> <ul style="list-style-type: none"> • £400k+ savings (annualised) from operatives not replaced in Construction Services through process efficiencies. • £350k+ savings on PRIP contract works through revised specifications. • £90k saved on the cost of mechanical and electrical audits. <p><u>Performance</u>: Externally benchmarked assessment that Berneslai Homes is a “good performance, low cost” operator overall:</p> <ul style="list-style-type: none"> • On operational productivity our performance is slightly above average and our costs materially lower than our peers’ average. • Our asset management performance is significantly higher than our peers, and our relative costs significantly lower.
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	<ul style="list-style-type: none"> • Our customer experience rating was significantly above the average of our peers. • There were identified areas in the detailed measures where BH is currently outperformed by its peers, notably on staff turnover and customer call answering. <p><u>Income generation</u>: £700k of external funding realised over two years to enhance services to tenants and support resources. A significant proportion of that came from non-recurrent ESF (European Social Fund) grants.</p> <p><u>Additional Income for customers</u>: Over £900k per annum secured including welfare benefits, Discretionary Housing Payments and grants.</p> <p>The report has been received and discussed by the Audit and Risk Committee on 13th June 2024 (Appendix A).</p> <p>The Committee was pleased that financial savings reported focused exclusively on changes made in the years reported, where historically recurrent financial benefits from changes made in prior years were also reported each subsequent year.</p> <p>The Committee noted with satisfaction the performance and achievements over the two years to 2024 and discussed in more depth and detail the current position and the challenging expectations and requirements expected to be presented in the near and medium-term future.</p> <p>The Committee was supportive of the strategic approach being taken in response to these challenges.</p>
<p>2. Recommendation</p>	<p>Board is requested to approve the progress and achievements made in maximising value for money as summarised in this report and detailed in the attached appendix.</p>

3. Appendices

Appendix A - Value for Money Report – Audit and Risk Committee 13th June 2024

-



Creating great homes and communities
with the people of Barnsley

Report Title	Value for Money Annual Report	Confidential	Yes
Report Author	Ed Long Head of Finance	Report Status	For Information
Report To	Audit & Risk Committee 13th June 2024	Officer Contact Details	Ed Long edwardlong@berneslaihomes.co.uk

1. Executive Summary	<p>This report provides a summary of Berneslai Homes' commitment to achieving and demonstrating Value for Money for 2022/23 and 2023/24, and also considers the forward position and plans for 2024/25 and beyond.</p> <p>Value for Money is embedded in everything we do. Obtaining the best outcomes for our customers, within available resources, is the key to achieving value for money as set out in Berneslai Homes Value for Money Strategy.</p> <p>Our customers have a key role in ensuring we deliver Value for Money. Formed in September 2019, 'The Tenant Voice' our model for co-regulation, continues to offer value for money.</p> <p>In previous years, the cumulative and ongoing benefits of savings and other value-for-money initiatives from prior years were included. From 2022-23 only new initiatives and savings are included. The recurrent impacts of previous initiatives continue to benefit operations and are included within normal business planning.</p> <ul style="list-style-type: none"> Over £1million of recurrent, annual savings were identified and actioned (albeit the full value was not realised on some items in the year of implementation due to timing) for re-investment in services to customers over the two years, along with £488K contributed from BH reserves to management fee, and £87K of non-recurrent (one-off) savings realised. The target savings from BMBC, at 1% of management fee, were £155K for 2023-24.
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<p>1. Executive Summary (Cont'd)</p>	<ul style="list-style-type: none"> • Operational productivity was scored as 'good performance, low cost' as evidenced by the Housemark Annual Performance Summary Report (for 2022/23). • £699K of external funding (across the two years) was received to enhance services to tenants and support resources. <p>Performance was slightly above that of peers and benchmarking data demonstrates that Berneslai Homes is a value for money organisation with high levels of performance and customer satisfaction being achieved at a relatively low cost.</p>
<p>2. Recommendation/s</p>	<p>It is recommended that the report is noted.</p>

3. Background

3.1 Obtaining the best outcomes for our customers within available resources is the key to achieving value for money. This means:

- Effectiveness – Doing the Right Things.
- Efficiency – Doing things in the Right Way.
- Economy – Doing things at the Right Price.

The Board has a key role in providing challenge on VFM.

4. Current Position/Issues for Consideration

4.1 Value For Money Strategy

The Value for Money Strategy approved in September 2020 for the period 2020 to 2023, set out our commitment to achieving Value for Money and the importance of this being at the heart of everything we do and embedding across the organisation that this is everyone's responsibility.

The strategy includes the following Value for Money aims:

- To provide cost effective services that give high levels of customer satisfaction.
- To maximise resources available.
- Underpinning our VFM aims are the following objectives:
 - To improve VFM.
 - To have an effectively managed approach to VFM.
 - To promote ownership and awareness throughout the organisation, with customers and other partners/stakeholders.
 - To demonstrate VFM.

4.2 Performance

For 2022/23 Berneslai Homes' operational productivity was scored as 'good performance, low cost' as evidenced by the Housemark Annual Performance Summary report November 2023.

The performance was slightly above that of peers and costs were lower.

Berneslai Homes achieved the following performance on the 2022/23 benchmarked indicators.

Quartile	LAs & ALMOs with greater than 10,000 dwellings (excluding London Boroughs and Scottish Social Landlords)
Upper (Quartile 1)	11
Middle Upper (Quartile 2)	6
Middle Lower (Quartile 3)	0
Lower (Quartile 4)	2

The benchmarking data clearly demonstrates that Berneslai Homes is a value for money organisation with high levels of performance and customer satisfaction being achieved at a relatively low cost.

Comparable benchmarking Information for 2023/24 will be available from November 2024.

4.3 External Funding

Berneslai Homes aims to identify and maximise external funding opportunities to enhance services offered to tenants and support resources, in 2022/23 and 2023/24 we received:

	<u>2022/23</u> £,000	<u>2023/24</u> £,000
Tenants First Service – ESF Grants	181	165
Kick Start Trainee Placements	54	
Education & Skills Grant	18	1
Housing Support & Multiply Grants	81	32
Community Renewal Fund	125	9
UK Prosperity Fund	29	
Grants from Suppliers	<u>3</u>	<u>2</u>
	491	209

Additional Income for Customers

We have secured over £945K additional income in 2023/24 and £914K in 2022/23 for our customers including welfare benefits, Discretionary Housing Payments and grants.

Customer & Estate Services staff, through their in-depth knowledge of welfare benefits and an ethos based around support and prevention have used their professional expertise to support many families. The equivalent figure for 2021/22 was around £900k.

4.4 Internal Efficiency (Financial) Savings

Details of recurrent and non-recurrent financial efficiency savings and their annual values are detailed in the appendices. Note that for recurrent savings all figures have been annualised and may not represent savings realised in-year for 2023-24 where innovations and other changes were implemented for only part of the financial year.

5 Customer Voice/Impact

Our customers have a key role in ensuring we deliver Value for Money. Formed in September 2019, 'The Tenant Voice' our model for co-regulation, continues to offer value for money.

5.1 The Tenant Voice Panel is made up of nine tenants from a diverse range of backgrounds, the panel ensure we remain compliant with the Regulator for Social Housing by assessing our performance against a range of Local Offers and Consumer Standards. If they feel that we may not be delivering they are able to pass the area of service onto the Tenant Scrutiny Panel for further investigation. Additionally, to ensure that tenants' voices are represented within our governance and performance management arrangements panel members attend our Customer Services Committee, PRIP Core Group and the Strategic Liaison Meeting with BMBC.

5.2 The Tenant Scrutiny Panel is a pool of 10 tenants with a wide range of knowledge and interests who we pull together when they have a project to work on. We call this a "Task and Finish" approach. We may only use up to 6 members per project, which enables more than one project to be up and running at a given time.

6. Risk and Risk Appetite

6.1 Financial

Material/service price increases and availability are a current risk which are managed closely through the company operational and financial processes.

Financial Management	Costs and Inflation	Risk Averse
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6.2 Regulation and Compliance

Regulation and Compliance are a key priority for BH reflected in the VFM Strategy.

Compliance	Legal and Regulatory	Risk Averse
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6.3 Operational

Our systems and services must be efficient and effective to ensure they meet the expectations of our customers. Our good performance is reflected in regular benchmarking.

Customer Services and service delivery	Innovation	Balanced Risk
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7. Strategic Alignment

7.1 Berneslai Homes is committed to providing cost effective services that give high levels of customer services whilst maximising resources available. The attainment of Value for Money is fundamental to the achievement of the Strategic Plan objectives.

8. Data Privacy

8.1 There are no data privacy issues arising directly from this report.

9. Consumer Regulatory Standards

9.1 This report relates to the Value for Money Regulatory Standard in demonstrating how Berneslai Homes achieve the value for money strategic objectives.

10. Other Statutory/Regulatory Compliance

10.1 The Finance team provide guidance and support to ensure the Financial Regulations of the Company and the Council are complied with.

11. Human Resources and Equality. Diversity and Inclusion

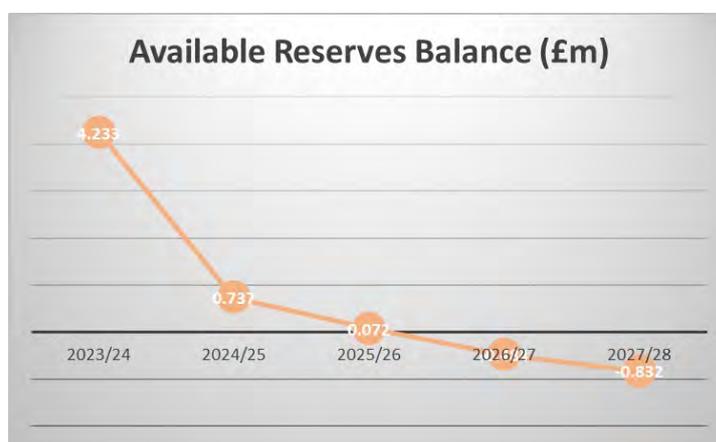
11.1 There are none arising directly from this report.

12. Sustainability Implications

12.1 There are none arising directly from this report.

13. Future Requirements & Plans

13.1 Graph 1: Available Reserves Projection.



13.2 On current trajectories, the available reserves of BH will be exhausted in 2026. To avert this result, recurrent, cashable savings of £0.5m a year are required to be delivered from current operations, deliverable no later than with effect from 1st April 2025.

13.3 In addition to addressing the current structural deficit we have been required to find recurrent efficiencies (savings) of £1M per annum on the HRA account by BMBC. It is expected that this will largely be achieved through productivity improvements resulting from the Repairs First implementation, noting that with the requirement to generate cash savings (as opposed to increased working), reducing the cost base can be expected to generate additional one-off costs. There is also expected to be a long term financial benefit from the closure of the Carlton Depot.

13.4 Although the main financial benefits of the Repairs First project will be seen directly in CS, improved systems and business processes can also be expected to present opportunities in other areas of BH to deliver wider efficiencies, contributing materially to the total requirement of delivering £1.5m of recurrent annual savings.

13.5 The Value for Money Strategy for 2024-27, linked to the overall three-year business strategy, is being developed currently for approval by Board in the autumn. Corporate Assurance (internal audit) intend to conduct a Value for Money audit imminently and any identified learning from this process will inform the development of the strategy. It is intended that the Value for Money programme will be integrated from 2024 into the overall business planning and budgeting cycle, although we will also continue to monitor and report on Value for Money initiatives and performance specifically and separately.

14. Appendices

14.1 Appendix A - Housemark Benchmarking Report 2023.

14.2 Appendix B - Efficiency Register 2022/23.

14.3 Appendix C - Efficiency Register 2023/24.

15. Glossary

15.1 VFM - Value for Money.
HRA - Housing Revenue Account.
ESF - European Social Fund.



Annual Performance Summary

Berneslai Homes

Executive summary

Social landlords are facing increased scrutiny. The quality and safety of social housing is under the microscope and significant investment is required to ensure the houses we provide are well-maintained, safe and environmentally friendly.

Unlocking the investment required against the current backdrop of high inflation and rising customer expectations will require good financial management and robust business decisions.

Your Housemark membership provides you with the comparisons and insight you need across all core landlord functions. Using Housemark data you can understand where you are investing, and how this is impacting on your operational performance and customer experience.

This annual performance summary shows how your costs and performance compare for the 2022/23 financial year against a group of similar landlords. To understand these scores in context and how you might improve, contact data@housemark.co.uk.

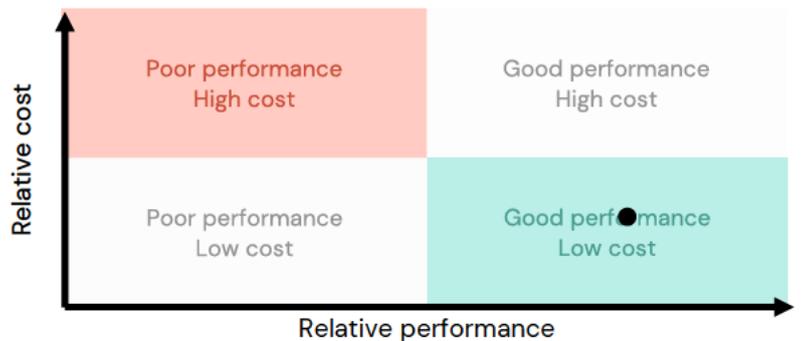
Operational productivity

Your overall operational performance was slightly above that of your peers and your costs are lower. This is based on your overheads cost per property of £253, front-line housing management cost per property of £246 and your average performance across arrears, void loss, staff sickness and turnover.



Asset management

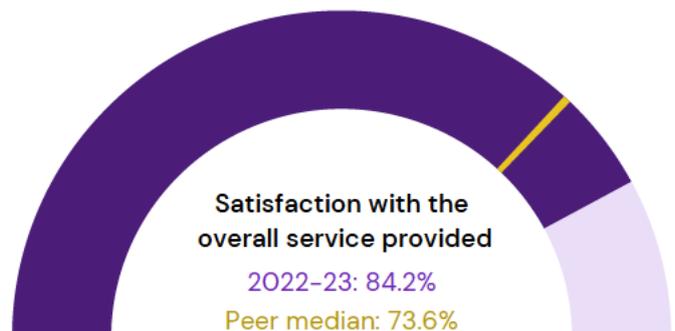
Your overall maintenance performance was above that of your peers and your front-line costs are lower. This is based on your responsive repairs and void works cost per property of £860, your cyclical maintenance and major works cost per property of £1,369 and your average performance across gas safety, repairs volumes, repairs completed within target and repairs satisfaction.



Customer experience

Your overall satisfaction score was above that of your peers. This is based on your annual perception survey results from 2022/2023 and places you in quartile 1.

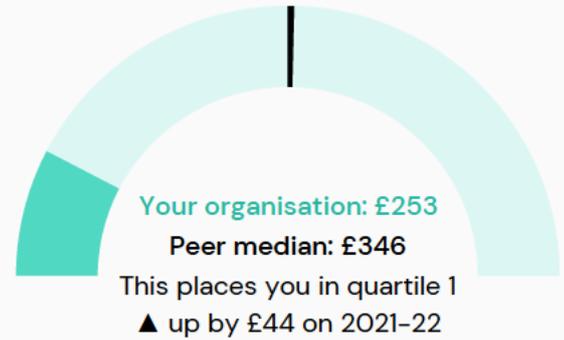
It is important to understand the impact of your operational context and how you carried out your survey to build a clear understanding of relative performance. We published an analysis of the key variables that influence the outcomes of satisfaction surveys – get your copy [here](#).



Operational productivity

Overheads cost per property

Housemark's definition of overheads includes all spend on premises, ITC, finance, HR and other central back-office costs. Central overheads make up 48% of your spend, finance, HR and IT contribute 39% and 13% is spent on premises. Larger housing associations can typically achieve some economies of scale in overheads, particularly in the finance and central functions. However, recent years have seen increases particularly relating to IT investment and central business improvement staffing. For local authorities, overheads are largely made up of recharges to the general fund.



Housing management cost per property (direct)

Housing management is a core landlord service largely made up of front-line employee costs – including specialist rent collection officers, lettings teams, ASB managers and generic housing, neighbourhood officers and administrators. These staff play a vital role in delivering an excellent customer experience, and increasingly landlords are looking at how these functions are structured to deliver services in the most efficient way possible. Housemark is a key resource when it comes to comparing staffing structures and outcomes.



Housing management

Current tenant arrears



2022-23: 3.54%
▲ up by 0.20 on 2021-22
Peer median: 3.75%
This places you in quartile 2

The cost-of-living crisis has placed significant pressure on tenants who in many cases are having to make tough choices about what they can afford. At a national level we have seen a slow and steady uptick in arrears over the past year, mostly driven by urban landlords who typically have a more challenging arrears profile.

Rent loss due to voids



2022-23: 1.11%
▲ up by 0.39 on 2021-22
Peer median: 1.58%
This places you in quartile 2

Efforts to clear persistent voids backlogs have been hampered by the increased price of materials and volatility in the labour market. Whilst vacancy rates at the average landlord have now returned to normal, re-let times remain higher due to dwellings being empty for longer. Void loss across the sector is improving but is likely to remain higher than pre-pandemic levels until March 2024.

Staff wellbeing

Average working days lost due to sickness absence



2022-23: 11.1
▲ up by 2.39 on 2021-22
Peer median: 12.4
This places you in quartile 2



Sickness absence across the [entire UK workforce](#) remains higher than prior to the pandemic. Two-thirds of employers report COVID is still a significant cause of absence. Social landlords historically report higher sickness absence than other sectors which remains true in 2023, particularly landlords with a high proportion of customer-facing staff.

Percentage of staff turnover in the year



2022-23: 18.09%
▲ up by 0.13 on 2021-22
Peer median: 12.08%
This places you in quartile 4



Staff attrition remains stubbornly high for the average landlord. The average cost per employee has increased 6.6% over the past year, but Gallup Research suggests pay and benefits are not the only thing that matters to employees. 41% of employees surveyed said that improving the workplace culture is the most important thing an employer can do to keep them engaged.

Asset management

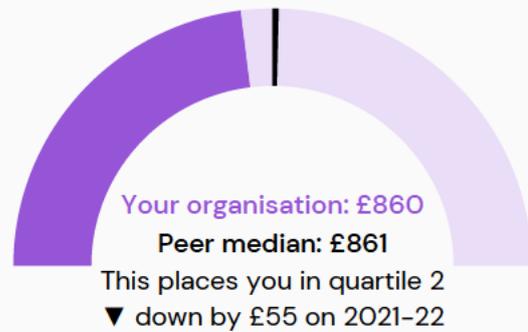
Housing maintenance cost per property (direct)

Construction sector price inflation – an effect of labour and materials shortages – resulted in a challenging operating environment for repairs teams during 2022/23. In an industry known for tight margins we have seen many contractors going out of business with many landlords looking to bring services in-house. Our data shows that neither method of repairs delivery is intrinsically better value for money, with both relying on the capabilities and resources available to all parties to make the service a success.

Major works and cyclical maintenance



Responsive repairs and void works



Responsive repairs

While repairs volumes have largely returned to pre-pandemic levels, repairs teams continue to struggle to provide a service that meets residents' expectations – with landlords struggling to meet the same level of performance as previous years, which often results in lower satisfaction rates.

Number of responsive repairs per property



2022-23: 3.0
 ▼ down by 0.79 on 2021-22
 Peer median: 3.0
 This places you in quartile 2

Satisfaction with the repairs service over the last 12 months (perception)



2022-23: 83.1%
 ▲ up by 1.60 on 2021-22
 Peer median: 75.9%
 This places you in quartile 1

Percentage of emergency repairs completed within target timescale



2022-23: 99.50%
 This measure is new for 2022/23
 Peer median: 97.12%
 This places you in quartile 1

Percentage of non-emergency repairs completed within target timescale



2022-23: 99.26%
 This measure is new for 2022/23
 Peer median: 85.00%
 This places you in quartile 1

Maintaining homes

Building safety and quality has become one of the most important challenges facing landlords in 2023. In addition to existing safety compliance, the consequences of poor maintenance such as damp and mouldy homes became a key concern, resulting in parliamentary legislation. Measuring quality and safety compliance will require technical expertise in the short to medium term as landlords build up a picture of stock and keep it updated in line with regulatory expectations.



72.0% of properties UK-wide were rated EPC C or higher in 2022/23 – get in touch for help submitting this data.

Building Safety 2022-23 results	Your result	Peer median
Dwellings with valid gas safety cert	100.00%	99.99%
Properties with EICR up to 5 yrs old	86.97%	93.83%
Non-domestic assets covered by valid Fire Risk Assessment	100.00%	100.00%
Non-domestic assets covered by current asbestos survey	100.00%	100.00%
Relevant water installations covered by risk assessment	99.29%	100.00%
Lift safety (LOLER) examinations completed within target	100.00%	100.00%

Customer experience

Perception

Overall satisfaction with the service provided by social landlords has been declining for a number of years and is now on average 10 percentage points lower than five years ago. However, latest results from our monthly monitoring are providing encouraging signs of improvement, driven primarily by English landlords focussing on improving the customer experience in light of new regulation.

Satisfaction with the overall service provided by the landlord



2022-23: 84.2%
Peer median: 73.6%
This places you in quartile 1
▼ down by 1.10 on 2021-22

Satisfaction that the landlord listens to views and acts upon them



2022-23: 68.1%
Peer median: 59.9%
This places you in quartile 1
▼ down by 1.90 on 2021-22

Complaints

We know there is variation amongst landlords in what is recorded as a formal complaint, particularly when it comes to service requests. As such, high volumes are not necessarily negative as long as they drive service improvement. Our data shows an overall increase in volumes as tenants become more aware of ways to voice concerns. Definitions for these measures differ slightly across the UK in line with differing regulatory regimes but are broadly comparable and so have been combined for this report.

Stage 1 complaints received per 1,000 properties



2022-23: 21.8
This measure is new for 2022/23
Peer median: 32.7
This places you in quartile 1

Percentage of complaints responded to within target time



2022-23: 91.9%
This measure is new for 2022/23
Peer median: 68.3%
This places you in quartile 1

Anti-social behaviour

Reports of ASB vary significantly between landlords. Large urban landlords typically report significantly higher volumes than their smaller more rural providers. Landlord approaches to what gets logged as ASB can also vary significantly with incidents such as rubbish and garden nuisance treated differently.

Number of new ASB cases reported per 1,000 properties



2022-23: 38.4
You did not submit data in 2021-22
Peer median: 54.3
This places you in quartile 2

Satisfaction that the landlord makes a positive contribution to neighbourhoods



2022-23: 64.2%
Peer median: 53.4%
This places you in quartile 1

Contact

Contact centres across the UK are under significant pressure as average wait times continue to increase and have quadrupled in just four years. Despite the deployment of digital channels, the average landlord still receives just as many calls, but answers fewer and spends longer on each call. This is exacerbated by contact centres having to manage with fewer staff numbers and significant staff turnover.

Number of calls answered per property



2022-23: 7.4
▼ down by 0.69 on 2021-22
Peer median: 5.4
This places you in quartile 4

Average time to answer inbound telephone calls (seconds)



No data for 2022-23
2021-22: 226.0
Peer median: 360.0

Appendix

The data in this report is based on cost and performance data for the financial year 2022–23, unless otherwise stated. All quartile comparisons are based on your bespoke peer group which is detailed below.

Note, we have issued this report now because we already hold data for most of your peers. However, due to mergers, acquisitions, entity name changes and late submissions, your peer group may change over time. Housemark can provide information and advice on peer groups on request, including expected submission dates for any potential latecomers.

Further analysis against different peer groups is recommended using Housemark’s online reporting tool. Our online tool includes hundreds of additional measures that can help you understand your performance in context. The tool displays live data and so if more of your peers submit data, your results may differ compared to this report.

Summary Quadrant

This report includes quadrants that summarise how well you perform compared to your peer group within two key areas. These are calculated using all the KPIs included on those pages. For example, ‘Operational Productivity’ plots your average relative cost position using your overheads and housing management cost per property results and your average relative performance position using your arrears, void loss, staff sickness and turnover results.



Peer group

The organisations in your peer group have the following characteristics:

Name

English LAs and ALMOs >10k (excl London)

Size

10,088 – 56,456 units

Region

North East	✓
North West	✓
Yorkshire and Humberside	✓
Eastern	✓
East Midlands	✓
West Midlands	✓
London	
South East	✓
South West	✓
Scotland	
Wales	
Northern Ireland	
Other	

Organisation type

ALMOs	✓
London Boroughs	
Mets/Unitaries	✓
Districts	✓
Housing Association (LSVT)	
Housing Association (Traditional)	
Other	

DLO

Yes	✓
No	✓
No data	

Total sample size

25



Efficiency Savings Register 2022/23

Ref	Budget Holder	Description of Saving	Budget saving made against	Value of saving	Cash saving Y / N	One off or recurring
1	Various	Reduction in car allowance claims against pre- Covid levels	Various MF budgets	£46,000	Y	Recurring
2	Various	Reduced photocopier usage in year - new copiers and agreement due to be implemented with BMBC	Various MF budgets	£14,000	Y	One Off
3	Income Manager	All Pay Cash Collection charges	80228 - Income	£26,000	Y	Recurring
4	Various	Mobile phone contracts have been re-negotiated which has resulted in a reduction in data charges	Various MF budgets	£13,000	Y	Recurring
5	Various	Underspend against Building Cleaning budget	Various MF budgets	£25,000	Y	Recurring
6	Chris Brownley	Under utilisation of mobile working project budget	80213 - Performance & IT	£30,000	Y	Recurring
7						
8						
9						
10						
			Total savings in year	£154,000		



Efficiency Savings Register 2023/24

Ref	Budget Holder	Description of Saving	Value of saving	Cash saving Y / N	One off or recurring
1	Sam Roebuck	Alternative purchasing contract setup for IT Hardware (excluding laptops)	£2,157	Y	Recurring
2	Leanne Armitage	Atamis annual licence renewal cancelled	£1,853	Y	Recurring
3	Amanda Garrard	Placeshapers membership not renewed	£4,000	Y	Recurring
4	Lee Winterbottom	Morgan Lambert Efficiency Saving (Mechanical & Electrical Audits)	£90,690	Y/N*	Recurring
5	John Dowle	PRIP - Kitchens being moved from programme replacements to BHS.	£92,000	Y	Recurring
6	John Dowle	PRIP - Kitchens savings from removing tiling element	£97,500	Y	Recurring
7	John Dowle	PRIP - Voltage Optimiser removal from electrical specification	£175,500	Y	Recurring
8	John Dowle	Identification of mismatch EPCs	£24,000	Y	One-off
9	John Dowle	Electrical Installation Condition Reports (EICR) procurement	£48,760	Y	One-off
10	Lee Winterbottom	Operatives not replaced following introduction of DRS	£413,000	Y/N*	Recurring
Total savings achieved			£949,460		

*Annualised cost saving, not fully realised in 2023-24

Knowing our customers

We know...



91% English
1% Polish
7% unknown



21%
Physical Disability



89% White British
8% PNS
1.2% European



55% Christian
31% No Religion
3% Unknown
7% PNS



61% Female
39% Male



2.4% 24 and below
43.8% 25 to 54
53.8% 55 or over



73% Straight
26% PNS



5%
Learning Disability



21%
Mental Health



14%
Sensory Disability

We collect data at the start of every tenancy (*) and then periodically to find out more about our 17,967 tenants. Knowing our customers is really important so we can get things right for everyone and can:

- Understand more about their needs and experiences
- Inform services and tailor the individual customer experience

(*) main tenant only

Data: Feb 2024

Our assets / our homes



Total assets ▶

18,400 total assets
Council owned stock – 17,967
Together housing – 53
Leaseholders – 349
Shops – 31



Council owned stock ▶

Houses - 10,219 (57%) of which: 2,838 (28%) are 2 bed houses, 7,087 (69%) are 3 bed houses, 294 (3%) other, 1 bed and 4 bed+
Bungalows - 4,644 (26%)
Flats, maisonettes, bedsits and other property types - 3,104 (17%)



Designation ▶

68% of homes are general needs (12,167)
32% with restrictions (5,794)
11 Independent Living Schemes with 312 flats for over 60s



Age of stock ▶

70% of homes were built before 1965



Attributes ▶

743 blocks to maintain
46 community facilities
90% of our homes are mains gas, 10% air source, biomass, ground source, other electrical and solid fuel



Condition ▶

14,008 homes EPC surveyed (78%)
99.91% homes meet Barnesley Homes Standard
15,073 homes received stock condition survey (84%)

Data: May 2024

Building safety compliance

- ✓ Fire safety compliance
- ✓ Gas safety compliance
- ✓ Asbestos safety compliance **100%**
- ✓ Water safety compliance
- ✓ Lift maintenance

✓ Electric safety compliance (*) **99.93%**

(*) This is due to no access, which we're working on as a priority

Data: April 2024

Repairs and maintenance



75% Satisfaction with repairs in last 12 months

76% Satisfaction with time taken to complete repairs after being reported

3 Disrepair cases (Since April 2024)

387 Damp, mould and condensation treatment jobs outstanding.

Managing estates



60% Satisfaction landlord makes a positive contribution to neighbourhoods

48% Satisfaction with landlord's approach to handling of anti-social behaviour

66% Satisfaction that communal areas are clean and well maintained

Letting homes

5,813 Number of people on housing register

88 Average number of applications per property advertised



The new Lettings Policy went live on 1 April 2024

Data: May 2024

Listening to tenants

43% Satisfaction with how we deal with complaints

60% Satisfaction that we listen to tenant views and act upon them

29 Service improvements implemented during 2023/24

64% Satisfaction that we keep tenants informed



77% Satisfaction that we treat tenants fairly

Delivering value for money



- 77% of tenants say rent is value for money
- Collected 95% of rent due (April 2024)
- Tenant arrears 3.41% (April 2024)
- 66% of funds were spent locally, supporting the local economy and keeping the 'Barnsley Pound' in Barnsley (March 2024)
- Made over £154K of efficiency savings that was invested back into services (2022/2023)

Data: September 2023



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Last updated May 2024



**Minutes of Berneslai Homes Public Board held 30th May 2024 at
4.00pm Gateway Plaza**

Present:

- Ken Taylor - Chair
- Richard Fryer - Board Member
- Adam Hutchinson - Board Member
- Mark Johnson - Board Member
- Gez Morrall - Board Member
- Kevin Osborne - Board Member
- Eric Smith - Board Member (Co-optee to the Board)
- Jo Sugden - Board Member
- Sarah Tattersall - Board Member
- Rebecca Mather - Board Member (appointed to Board at Item 5)

In attendance

- Amanda Garrard - CEO
- Dave Fullen - Executive Director, Customer & Estate Services
- Arturo Gulla - Executive Director, Property Services
- Lee Winterbottom - Managing Director Construction Services
- Kulvinder Sihota - Executive Director, Corporate Services
- Sam Roebuck - Head of Governance and Strategy and Company Secretary
- Kathy McArdle - Service Director BMBC
- Sharon Bradley (for Item 3 only) - Head of Corporate Assurance BMBC

Observing

- CLlr R Franklin - Cabinet Spokesperson for Regeneration and Culture

The Chair welcomed everyone to the meeting and introductions followed

	ACTION
<u>Item 1 – Apologies</u>	
Mahara Haque – Independent Chair Customer Services Committee	
<u>Item 2 – Declarations of Interest</u>	
There were none declared.	

<p><u>Item 3 – Corporate Assurance Approach</u></p> <p>SB presented detailed information to Board on BMBC’s Corporate Assurance Team and approach. The main areas covered were team structure, the specialist functions and areas, the corporate assurance approach and plan, outlining an example using Strategy as the theme. The team mission was brought to the meeting’s attention, and she reiterated the importance of delivering a professional, innovative, insightful and client focused service, aligned to strategic objectives, strategies and priorities, achieved through an independent and objective corporate assurance, consultancy and advisory function. Specific attention was also drawn to the Audit and Risk Committee and the timetable for reports to be presented throughout the year.</p> <p>AH as Chair of the Audit and Risk Committee summarised the process and referred to the opportunity at every meeting for members of Committee to speak with Internal Audit, without officers present, if required. He commented that Internal Audit provide a good service to Berneslai Homes with thorough established routines and processes in place. Any asks of them by Committee have always been actioned/responded to, an example of this was a request for 6 monthly anti-fraud updates to be provided. The Committee relies greatly on their assurance and feel the arrangement works well.</p> <p>The Chair thanked SB for sharing the detailed presentation with Board and also extended thanks for the work they do which is very much appreciated</p> <p>Resolved:</p> <p>The presentation was received.</p>	
<p><u>Item 4 – Customer First – Zero Carbon Video</u></p> <p>AGu introduced the video which also provided an insight from a customer perspective.</p> <p>The video was well received, and comments followed. Board were pleased with the work that has taken place and they felt that the positive feedback from tenants clearly demonstrates the benefits achieved. Aesthetically the work has also greatly improved homes. Seeing how people’s lives have been affected is very impactful and hopefully this will continue in the future. However, the challenges were acknowledged, particularly with regard to the significant stock number and the funding required.</p> <p>Board asked that their thanks are passed on to the teams involved.</p> <p>Board were asked if they would like any other videos to be produced on areas of particular interest to inform EMT, so these can be planned in.</p> <p>Resolved:</p> <p>Board received the presentation.</p>	All

Item 5 – Governance Update

SR presented the report.

Attention was drawn to paragraph 1.2 which refers to the recruitment process to engage a new Tenant Board Member. Rebecca Mather is the successful candidate and Remuneration Committee has recommended the appointment to Board for approval. The appointment date is 30th May, subject to the required verification and ID checks. Board noted there will be changes in the procedure of the appointment of future Board Members and the procedure is currently being updated.

The report updated Board on the company law provisions in the Economic Crime and Corporate Transparency Act 2023 and the changes to the appointment of Board members.

SR referred to paragraph 3 and the review of Delegated Decisions etc following the Board session facilitated by DTP. Work is taking place with the Council to have oversight on those requiring Council approval. Liaison will then take place with the Chairs to agree the format of reports at first and second hearing. Reviewed Delegations will be reported to the July Board.

Resolved:

- **Board approved the recommendation by Remuneration Committee that Rebecca Mather be appointed as the new Tenant Board Member at Board on 30th May 2024.**
- **Board noted the changes regarding Companies House.**
- **Board approved that the ID checks and verification be carried out by the Risk and Governance Manager on behalf of Board.**
- **Board noted that there will be a change in procedure for the appointment of future Board members and the procedure will be updated by the Risk and Governance Manager.**

The Chair on behalf of Board members formally welcomed Rebecca Mather to the Board.

Item 6 – Board Self Evaluation

The Chair outlined the annual Board self-evaluation this year facilitated by DTP. He referred to the work plan produced and the positive responses on governance received from Board members, demonstrating maturity, with a willingness to develop and progress. The areas identified for improvement were noted. The Chair felt it was a fair evaluation, reflecting where the Board are at currently and asked for any views.

Board felt it was a positive assessment. They referred to face to face engagement and felt this could be increased. The Customer Services Committee being held in the community has been positive and does promote

<p>Board members, increasing their visibility, which was felt important. Other opportunities need to be explored with both tenants and staff.</p> <p>The importance of regular external governance reviews was highlighted, and Board felt this needs to continue to be a key focus area.</p> <p>It was agreed that EDI requires more focus with greater insight. The Chair referred to the NHF Chairs Challenge around EDI, which he thought would be a good framework to use. He said he would be happy to lead but feels a Champion for EDI is required from Board. If Board agrees he suggested JS for this role, due to her knowledge/experience in this area. Board noted that there is no cost or timescale to complete, it is a continuing process. Board agreed with the Chair's proposal and JS agreed to take on the role of EDI Champion. Board requested that a 6 monthly report/update be provided to on the tool kits with suggestions how tenants and Board members can support. AGa suggested using the Board Away Day on the 11th July to establish the vision for EDI in the first instance with an external facilitator. AGa to approach Mushtaq Khan (HDN) on his availability.</p> <p>Resolved:</p> <ul style="list-style-type: none"> • Board discussed and approved the evaluation of the board self-assessment. • Board approved the action plan to strengthen the Board governance arrangements • As part of this report, Board considered any further areas where the Governance Team could support Board members to further develop and embed our governance arrangements. • Board agreed to sign up to the NHF Chairs Challenge around EDI and agreed that JS take on the role of the Board EDI Champion. 	AGa
<p><u>Item 7 – Gender Pay Gap (referred from Remuneration Committee)</u></p> <p>KS advised that this was the statutory report and had been considered and discussed in detail at the last Remuneration Committee. They have referred to Board for approval. RF as Chair of Remuneration Committee confirmed their satisfaction with the report and support the action plan.</p> <p>KS brought to the meeting's attention the key information contained within the Executive Summary and provided assurance that the gender pay gap will continue to be addressed to create a better gender balance, improve recruitment and selection and encourage a better work life balance.</p> <p>Although Board agreed it was a positive report, they felt that BH need to continue to be mindful of the known bonus scheme risks and the prevalence of males in the scheme (paragraph 4.5 of the report).</p> <p>KMCa to update Board on how this compares with the Council's Gender pay Gap report</p>	KMCA

<p>Resolved:</p> <p>Board approved the report.</p>	
<p><u>Item 8 – Repairs and Maintenance Policy</u></p> <p>AGu presented the report which is a policy for managing repairs and maintenance. It aims to ensure compliance with statutory requirements and the new standards. The main focus of the policy is around ensuring homes are safe. The policy has been developed in consultation with customers and aligns with the Strategic Plan and the vision of Barnsley 2030. ST provided assurance to Board of the detailed discussions she has had with tenants when out in the community. Although the policy requires approval of Board, it will be subject to the Council’s governance processes which could result in further amendments.</p> <p>Board referred to the implementation of Awaab’s Law, delayed until after the general election. This may have to be revisited as it progresses to reflect any amendments that may arise.</p> <p>Board recognised the challenging timescales and questioned if these could be met. AGu provided Board with assurance on the categories, of which BH are in the top quartile. However, there are issues around planned repairs and backlogs linked to prioritising budgets which is a contentious area.</p> <p>A Councillor briefing will be taking place on new procedures and a request made that information be shared with them on timescales for repairs, as it is felt critical that councillors are well briefed.</p> <p>The Policy will be presented to White Cabinet on the 26th June.</p> <p>Resolved:</p> <p>Board approved the Repairs and Maintenance Policy.</p>	
<p><u>Item 9 – Quarterly Risk Update</u></p> <p>SR presented the report which was considered in detail at the last Audit and Risk Committee. They have recommended to Board to approve.</p> <p>Board were asked to note the Operational and Fraud issues and concerns and that Audit and Risk Committee were satisfied that the strategic risks cover the range of risks facing the organisation currently.</p> <p>The Corporate Assurance review of the annual self-assessment to measure compliance against the NHF Code of Governance was noted by Board. This concluded in a substantial assurance opinion with no findings or implications raised.</p>	

Board were advised that the 2023 /24 self-assessment action plan was reviewed in April 2024. The Committee had queried if resources could deliver the activity scheduled for April. Clarity was provided that this was not as a result of the self-assessment, it was activity scheduled, in line with the start of the new financial year.

Audit and Risk Committee reviewed the Risk Appetite Statement following a zero based risk appetite exercise undertaken by Board in February and did not make any recommendation for changes.

Board acknowledged the risk on the organisation and on the sector, highlighting that of the 8 critical risks, 4 relate to resources, with the HRA being unable to fund what is required and they questioned the solution to this. AGa advised the Berneslai Homes have met with the Council on the HRA and General Fund. Conversations will be taking place with the NFA, LGA etc as there is currently no single voice for Council homes. Savills are also undertaking some work for the LGA and NFA jointly and Barnsley will be a case study. Evidence is required for the new government to show the HRA cannot currently meet current and future needs nationally.

A Board member referred to some local public events taking place over the summer period and suggested BH attend to provide advice on damp, mould and also engage with tenants and residents.

Resolved:

- **Board reviewed and commented on the Quarterly Risk Update**
- **Board reviewed and commented on the Strategic Risks**
- **Board approved the current version of the Risk Appetite Statement to ensure that it remains fit for purpose until the review in June 2025**

Item 10 – BH Annual Investment Strategy (Referred from Audit & Risk Committee)

KS presented the report which was discussed by Audit and Risk Committee who recommended to Board for approval

The report was prepared by BMBC and covers investment priorities, strategy, scheme of delegation, policy statement, credit worthiness policy, a summary of cash management for quarter 3 and an investment portfolio overview.

The strategy is based on statutory guidance and CIPFA best practice. The investment priorities adopted for investing prudently is based on security, liquidity and yield.

Board were referred to Appendix D showing the £2.8M invested in the approved 'A' rated establishments.

<p>AH, Chair of Audit and Risk advised Board of the good presentation by BMBC at the last Committee.</p> <p>Resolved:</p> <p>Board approved:-</p> <ul style="list-style-type: none"> • The Investment Strategy. • The investment limits set out at paragraph 3.4. • The instruments list set out at paragraph 3.9 • The scheme of delegation outlined in Appendix A and the policy statement outlined in Appendix B. 	
<p><u>Item 11 – 2023/2024 Performance Summary</u></p> <p>DF presented, summarising the key points.</p> <p>Board noted the strong performance on building safety measures which has consistently been maintained. The number of successful hardship fund applications awarded was highlighted and Board were advised of the process and the analysis that has taken place. This funding, however, ceased on the 31/3/24. The improvement in rent collection was also noted.</p> <p>The main areas of focus are void rent loss, void turnaround and meeting the complaint handling code standard.</p> <p>The full report was considered in detail by Customer Services Committee, and they felt assured with the measures in place to address areas of under-performance. Complaints were also discussed in detail at that Committee and they were satisfied with the plan in place to address the issues. They did request this be monitored and reviewed by EMT throughout the year. This is a key area of focus. The Committee also raised the importance of staff satisfaction as this could impact on performance.</p> <p>Attention was drawn to the summary against performance targets. A new set has been agreed with the Council for 2024/25 which are more realistic, taking into consideration the situation within the sector and the external context.</p> <p>DF advised that since the report was produced void rent loss has continued to be an area of focus. Complaints also continue to increase and be carefully monitored. On a more positive note, rent collection continues to improve against the new targets, 1.2% better than at the same time as last year.</p> <p>Board felt the report was good and positive comments were made on the format. Staff satisfaction was discussed, Board being particularly interested in the areas of dissatisfaction. DF advised these are mainly around pay, against austerity which is difficult to address. However, BH do promote the positives and wider benefits of working for BH and the schemes in place, flexible working etc. . AGa stressed the importance of supporting managers</p>	

<p>to help staff with change and referred to the IIP survey which was undertaken when going through a significant restructure and latterly the Repairs First process/implementation. The pressure colleagues are facing with regard to the increase in complaint volumes was explored at Customer Services Committee and they felt assured with the actions in place. One of the actions was for temporary additional staff to be recruited in Property Services and Customer Services Teams which has been actioned, highlighting to staff that EMT have listened.</p> <p>An observation was made on the number of targets being reduced in 2024/25. A detailed explanation was provided illustrating that current year targets are based on the most recent TSM and Housemark benchmarking data.; The STAR survey is also currently being undertaken and results will be reported to Board on the results and TSM data.</p> <p>Resolved:</p> <ul style="list-style-type: none"> • Board considered year end performance. • Board were satisfied with the explanations provide where performance targets have not been achieved that there are adequate controls and actions in place. • Board did not identify any further areas for consideration by Customer Services Committee 	
<p><u>Item 12 – Fire Safety and Building Safety Update</u></p> <p>AGU presented the information, bringing to Board’s attention the key points within the report, outlining the recent improvement works and the actions to note from the Building Safety Act 2022 and the Fire Safety Act 2021.</p> <p>Board expressed concern where some tenants are refusing the installation of sprinklers in the high rise buildings and queried whether this could be enforced. AGU advised that as sprinklers are a secondary system, with compartmentalisation in place enforcement is not possible. Tenant champions have in some instances been successful in changing some tenants’ opinions. Where not successful, sprinklers are installed once the flats become void. BH acknowledged compartmentalisation continues to be assessed under the FRA inspection programme.</p> <p>A member reported on a recent visit to Buckley and Britannia House flats and was impressed with the work undertaken. Conversations also took place with residents which was very positive. A suggestion was made for a visit to be arranged for Board members.</p> <p>There was a query on the frequency of the fire risk assessment programme, from 2 years to 3 years for low risk flats. Board were assured that this decision had been made based on a risk approach based on sector best practice which recommends a 3 year FRA programme.</p>	

<p>Resolved:</p> <p>Board noted the contents of the report and did not identify any concerns or risk to escalate to BMBC.</p>	
<p><u>Item 13 - Resource Information Papers</u></p> <p><u>13.1 Board Members Fact Sheet</u></p> <p>Board felt the fact sheet was very useful.</p> <p>A suggestion was made that due to the significant activity taking place in the sector it may be beneficial for a succinct overview briefing note be produced for Board, covering the Social Housing Regulation Act, definitions etc in a similar format to the Board Fact Sheet.</p> <p><u>Post Meeting Note</u> AGa to discuss with JS and SR.</p>	<p>AGa</p>
<p><u>13.2 Innovation and Technology Strategy</u></p> <p>The report was noted</p>	

Board Meeting 30th May 2024

Actions

PUBLIC AGENDA			
Item	Action	By Whom	Comments
Item 6 – Board Self Evaluation	EDI Vision to be established at Board Away Day – external facilitator to be approached	AGa	Actioned. Mushtaq Khan (HDN) facilitating
Item 7 – Gender Pay Gap	Update to be provided on comparison with BMBC report	KMcA	Link to BMBC's Gender Pay Gap information below BMBC – Gender Pay Gap 2020 (barnsley.gov.uk)
Item 13.1 – Board Fact Sheet	Overview Briefing Note for Board to be considered – covering for example the Social Housing Regulation Act, definitions etc - similar to the Board Fact Sheet.	AGa	To discuss with JS - in progress