



Value for money and technology plan 2018-22

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1. Introduction & purpose

Achieving value for money means finding the best possible balance between keeping costs low and quality high for our residents. For the purposes of this plan, value for money is striving to achieve overall low costs in comparison to peers. This value for money, technology & investment plan is a key element in developing a **smarter approach to the way we work**, which we have identified as an important factor in achieving our mission to deliver **great value services that make a difference**.

2. Strategic aims

CBH's overall ambition as set out in our Strategic Plan 2017-22 is to be the **trusted choice for local housing, property and community services**.

We plan to do this by **delivering services that are valued by our customers** and **servicing our communities**. Value for money will be one of three key areas which will be the measures of our success. Our other headline measures, customer satisfaction and positive outcomes in the community, will only be deliverable if we manage to achieve value for money in order to invest in our services.

The aims of this plan are therefore to:

- **To use technology to do things better**
- **To get the most for the money we spend.**

3. Our ambition by 2022

We are already a low cost organisation: in 2015/16 we had the lowest housing management costs, the lowest overheads and the third lowest repair and void costs per property in the Eastern region. Our challenge over the following 5 years was to achieve savings, efficiencies and additional income that will allow us to invest in our services **for the benefit of our residents, potential new business partners and staff**. Our aim is that by focusing on value for money, investment and technology we will maintain **costs per property in the lowest 25% in the Eastern region** between now and 2022.

To deliver this we will need to demonstrate that:

- **We use technology to work better**
- **We provide high quality, cost-effective services**

4. How we will achieve our aim

We plan to achieve our aim of maintaining the cost per unit at or below current levels by:

- **Investing for the benefit of customers and communities**
- **Using technology to work smarter**
- **Basing decisions on business intelligence**
- **Directing resources to where they are needed most**
- **Ensuring our processes are efficient**
- **Supporting a culture of high performance and continuous improvement.**

5. How we will measure progress

We will monitor progress via the Value for Money and Technology Action Plan which accompanies this document.

In addition, we will track a number of indicators which will help us to monitor whether we are on track to remain a low cost provider whilst investing in service quality:

- **Cost per property**
- **% staff satisfied with how CBH supports them in the technology they use**
- **£ cashable savings achieved.**

6. Monitoring delivery

The Head of Finance and Head of ICT & Business Intelligence will be responsible for the action plan and will report progress and actions to Board on a quarterly basis via the Strategic Plan Assurance Report.

The Director of Business Improvement will present the reviewed plan to the Board annually.

The Head of Finance will be responsible for maintaining a log to record savings achieved and will report progress quarterly to the Corporate Management Team.

Unlike our Registered Provider counterparts, we are not required to report on value for money to the social housing regulator. We are, however, committed to undertaking regular review and assessment as best practice, and will provide a summary assessment based on HouseMark results to Colchester Borough Council on an annual basis.

7. References

HouseMark final reports: 2016-17- 2018-19.

8. Related documents

The CBH Strategic Plan 2017-22 gives overall direction to this plan.

The CBH Medium Term Delivery Plan 2018-22 sets out how we will deliver services on behalf of Colchester Borough Council to fulfil our management agreement obligations. This plan will guide us and help us to demonstrate how we are able to continue to deliver our obligations as a low-cost, high value provider.

The CBH Business Development Plan shapes how we will invest in income generation and create revenue which we can reinvest in the business.

The CBH Customer Plan guide how we need to invest in improving our services for customers.

The CBH People Plan sets out how we will invest in our staff to ensure they are supported to deliver maximum value for money for our income.

The CBH Community Plan sets out how we will invest in delivering our services to make a difference in the community in line with our social purpose.

The CBH Leadership Plan sets out how the Board and management of the company will be supported to set and follow the strategic direction of the company, including ensuring our stewardship of finances and making prudent investment decisions.

Document control sheet

Title	Value for Money & Technology plan					
File location	https://colchbh.sharepoint.com/sites/fnc/corpdoc/PolDevLib/CBH Value for Money & Technology plan 2018-22.docx					
Consultation	<p>Summary of consultees which took place in July & August 2017:</p> <ul style="list-style-type: none"> • Colchester Borough Council • Staff • Board • Finance and Audit Committee (in particular the Technology aspect of the plan) <p>October 2019</p> <ul style="list-style-type: none"> • Corporate management team • ICT & Business Intelligence management team <p>November 2020</p> <ul style="list-style-type: none"> • Corporate management team 					
Approved	Board 01/12/2020					
Next review	01/12/2021					
Circulation method	SharePoint, website					
Equality Impact Assessment	Required	Yes	Latest	01/02/2018	Review due	[EqIA Review Due (Full)]

Document amendment history

Version	Type	Date	Notes
1.0	New	April 2018	New plan agreed by Board
1.1	Minor amends	Dec 2018	Amendments by Brian Richardson, Interim Director of Business Improvement. Cashable savings progress KPI added.

Version	Type	Date	Notes
1.2	Major amends	Dec 2019	Refocused action plan on technology to incorporate previously separate Technology Plan. Plan renamed to Value for Money & Technology Plan (previously Value for Money, Technology & Investment Plan). Changes to progress KPI for staff satisfaction with technology and £ reinvested KPI removed
1.3	Minor amends	Dec 2020	Annual review.



Value for money & technology action plan

Completed



In progress/on target



Cancelled / on hold




Unlikely to achieve target


Not started/behind schedule/below target




Focus	Actions/projects/workstreams	Lead	Due by	Success measure	Progress	Notes
Investing for the benefit of customers and the community	Embed the Performance Management Framework (Balanced Scorecard)	Business Intelligence & Service Improvement Manager	April 2021	Low cost per property Increasing customer satisfaction.		Balanced scorecards introduced per team. Monthly performance exception report and complaints/enquiries reports reviewed by CMT. Balanced scorecards launched April 2019 but under ongoing continuous improvement / development, particularly with the implementation of dashboards & interactive reporting in NPS Housing. Further work to be done to develop and embed - needs to be used on a regular basis by managers, e.g. in


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						My Contribution (replacement for current 1-1s/performance reviews).
	Prioritise & earmark specific investment projects and how they will be funded from efficiencies	Head of Finance	Sept 2018 Oct 2020	£ Invested Resident feedback / compliments		Funds requested and agreed from reserves to fund transformation projects.
	Investigate the emergence of social value reporting and consider options for reporting to Corporate Management Team, the Board, and publicly	Head of Finance	March 2019	£x of social value compared to cost of service provision (e.g. £4 of social value for every £1 of overhead)		Social value measure developed for Community Plan – incorporated into procurement processes and reported as part of Community Plan. Social value included in Northgate contract. Social Value portal in place for contract procurement. We have started publicising tender opportunities which include social value as part of the quality evaluation.







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Using technology to work smarter	Produce a Technology Plan covering the investment, resources, training and organisational structure required	Service Development Manager	March 2018	Plan approved		Plan produced & agreed by Corporate Management Team November 2018 and subsequently incorporated into Value for Money & Technology Plan.
	Improve integration between systems and keep number of systems to a minimum	Head of ICT & Business Intelligence/ Housing Systems Business Partner	April 2021	Reduction in number of discrete systems in place		<p>Project Aurora on track to deliver integrated system.</p> <p>Further use & development of Microsoft 365 suite e.g. PowerApps, Teams, Bookings, SharePoint, Forms. in progress to reduce reliance on third party software. Exploring options for collaboration with CBC.</p> <p>Review of other systems (e.g. Assure H&S system) planned.</p>

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	Ensure processes are in place to support strategic alignment of ICT requests & projects	Head of ICT & Business Intelligence	April 2020	Work plan & work request /approval process reflects strategic priorities		Cross-team work plan in place aligned with strategic priorities. Decision-making strategic ICT group in place to ensure requests are appropriately prioritised. Process of triage, business cases, pilots, post-completion review etc. in place.
	Ensure support is adequately resourced & structured	Head of ICT & Business Intelligence	July 2021	% satisfied with CBH/CBC ICT support (we have baseline figures)		New post of Head of ICT & Business Intelligence created in senior management review 2019. Organisational structure to be reviewed starting 2020/21 – new structure will support transformation programme.
	Provide support to vulnerable customers via technology	Older Persons Services Manager	April 2021	Number of residents with access to supporting technology		WiFi access available in all sheltered schemes from Q3 2019/20. Sheltered schemes being used as hubs for Gigabit broadband network, meaning residents will benefit from high speed connections.



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						<p>Helpline, Telecare, alarm services, smart home devices etc. to be considered in future if appropriate budget available. Early conversations taking place re potential to harness funding by tying pilots to 5G rollout.</p>
	<p>Agree an approach to minimum IT skill expectations for new and existing staff</p>	<p>Corporate Management Team</p>	<p>Dec 2021</p>	<p>Agreed approach in place</p>	<p></p>	<p>Working towards role-based ICT competency framework based on. Once established this will be incorporated into the 1-1/appraisal process so it can be effectively monitored and driven by staff and managers.</p> <p>Capacity for ICT training to be explored as part of Programme 2020.</p> <p>Discussions underway with CBC on potential for buying into corporate training resources</p> <p>Aurora training in progress – role-based requirements to be finalised and incorporated into competency framework.</p>



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	Improve access to data whilst mobile working	IT & Support Manager/Ho using Systems Business Partner	April 2021	% staff who say access to data while mobile is having a significant/critical effect on their productivity (currently 58%)		<p>New housing management system will include mobile working solution and provide online/offline access to data, reducing reliance on good connection and tethering.</p> <p>Issues remain re connectivity of mobile network via EE across the borough – high number of blackspots. In discussions with CBC re renewal of mobile contract.</p> <p>Rollout of new handsets to replace problematic EE Hawks in progress. This should improve connectivity.</p>
	External review of WiFi/connection speed and how we use it	IT & Support Manager		Review complete and recommendations implemented		Upgraded connection rolled out at Greenstead office and sheltered schemes.
	Put in place electronic form	IT & Support Manager/Ho using	April 2021	Number of paperless processes available		New Northgate system will facilitate more mobile working from tenants' homes as well as enabling online transactions via tenant portal (phase 2, July 2021).





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	filling, e.g. from tenants' homes	Systems Business Partner		from tenants' homes		<p>Electronic signatures trialled for lettings team. Many market providers are costly; cost benefit analysis in progress.</p> <p>Many internal processes have moved to electronic signatures, e.g. finance processes.</p> <p>Further reductions in requirements for electronic signatures in place, e.g. annual leave authorisation process now on iTrent HR system.</p>
	Use technology for better collaboration	IT & Support Manager	Sept 2021	Number of SharePoint sites, project sites in place		<p>Excellent accelerated progress on remote collaboration via Teams due to Covid.</p> <p>More development to take place regarding further uses of Teams and other Microsoft 365 products, e.g. MS Bookings for shared booking calendars.</p> <p>A number of SharePoint project and meetings sites now in use, e.g. CBH/CBC Liaison meetings, Project Aurora, Project 2020.</p>





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	Use technology to support communication and cross-company working (e.g. SharePoint, messaging)	IT & Support Manager	April 2021	Consistent messaging/telephony solution % staff using Yammer, Instant Messaging etc.	    	<p>MITEL App trial not a success but Microsoft Teams now widely in use throughout the organisation for videoconferencing/calling and messaging. Further development of Teams to be reviewed – in conversations with CBC.</p> <p>Better mobile handsets being rolled out.</p> <p>245 staff signed up to Yammer as of September 2020 (up from 225 in October 2019). Used successfully for wellbeing initiatives during initial lockdown period.</p> <p>MS Teams used for all staff broadcasts and video messages by directors and Board members.</p> <p>Looking into a number of strands for improving customer communication (e.g. web chat, telephony, bookings) – see Customer Plan</p>
	External review of how we use SharePoint	Head of ICT & Business Intelligence	Sept 2020	Review complete & recommendat		<p>Mazars audit completed March 2020. A number of recommendations implemented; on track to implement recommendations.</p>



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				ions implemented		
	Harmonise SharePoint working practices (file saving, file access, how staff work on documents, Apps, Forms)	IT & Support Manager	April 2021	Add question to ICT survey?	▶	Number of improvements planned/in progress to how we work in SharePoint SharePoint New Experience rolled out. Support provided to staff via: <ul style="list-style-type: none"> • All staff training with external provider • Team presentations • Drop-ins • 1-1 training Depending on resources, more improvements may be possible, e.g. document intelligence – improved use of data for tagging, search, storage etc. Optimising of site structure may be possible as part of potential move on to shared CBC/CBH Microsoft tenancy. Data classification/categorisation of SharePoint content planned to fit in with Aurora document migration/security





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						access/data retention initiatives within CBH and CBC.
	Review to ensure all technology/hardware provided is adequate for all job roles	IT & Support Manager	Sept 2020	% staff happy with how CBH supports them with technology		Hardware provided should be linked to job role requirements, and any access to work needs. All 2-in-1s replaced with laptops - completed October 2020 Replacement programme for mobile handsets agreed – estimated completion December 2020 NPS mobile apps due to launch April-July 2021. Tablets will be required in addition to phones and laptops – estimated completion March 2021
	Use technology to improve the Board/Committee experience for	IT & Support Manager / Head of HR	April 2020	% Board satisfaction with process		Board meetings now taking place on MS Teams & Zoom. Purchase of Convene software agreed.






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	Board Members.	& Governance				
	Use technology to negate travel, such as Skype and teleconferencing	IT & Support Manager	Sept 2021	% of staff who spend 2 hours or more a week in face to face meetings (currently 43%)		<p>COVID-19 has precipitated the need for this and face-to-face meetings are not currently taking place. MS Teams has facilitated the move to remote working. Significant savings in mileage.</p> <p>Workflow and mobile working via project Aurora will further reduce the need for travel.</p> <p>Meeting rooms now equipped technology for hybrid remote/face-to-face meetings.</p>
	Use technology to ensure the right level of performance information at each level	Head of ICT & Business Intelligence	April 2021	Progress against solution for management information down to individual dashboards		<p>Improved online reporting functionality/dashboards will be available in new housing system, including interactive (self-serve) reporting.</p> <p>Need to consider best options to link up different data sets using additional reporting tools. Business Intelligence team exploring Power BI (in use by CBC)</p>



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	Facilitate real-time access to performance data	Head of ICT & Business Intelligence	April 2021	% KPIs with real time access		Much of the performance data has now been automated. Northgate Housing system will provide quasi-real time information.
	Improve access to data and forms through IT	Housing Systems Business Partner	April 2021	Direct access in place for Housing Management systems reporting		Business Intelligence team to have access to reporting tool in new housing management system.
	Ensure offices are enabled for smarter working	IT & Support Manager	March 2020	All office spaces Wi-Fi enabled & with hot desk capability		All spaces WiFi enabled. Gosbecks and Rowan set up for hotdesking.
	Increase automated processing	Corporate Management Team	Sept 2021	Number of processes automated		A number of processes have been developed using Microsoft PowerApps, e.g. electronic purchase orders, asset management raising




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						<p>orders/authorising, Right to Buy tracking, asset management handovers.</p> <p>In conversations with CBC around closer collaboration on in-house developed MS apps.</p> <p>Workflows/task manager will feature heavily in Phase 2 of Aurora project and beyond.</p>
	<p>Improve website functionality for residents and staff</p>	<p>IT & Support Manager/Housing Systems Business Partner</p>	<p>July 2021</p>	<p>Number of processes available online</p>	<p></p> <p></p> <p></p> <p></p>	<p>New website launched April 2019. Improved tenant alterations & repairs functionality and review of Housing Options web pages carried out.</p> <p>Reviewing reporting of complaints and enquiries via website</p> <p>Customer & contractor portals will be available via NPS Housing Online (scheduled to go live July 2021).</p> <p>Proposal to trial web chat – in discussions with CBC Customer Service Centre.</p>




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	Promote staff self-service using technology	CMT	Sept 2020	Number of helpdesk tickets raised where FAQ/online guide available.		Password resets, tips & tricks on Yammer Regular SharePoint updates Drop-in & 1-1 sessions for SharePoint ITrent now available for self-serve HR processes, e.g. sickness, expenses. Annual leave managed via system since January 2020. Interactive reporting available in Northgate Housing.
	Compliance with GDPR requirements	Head of HR & Governance	Sept 2020	Data file management processes in place to manage compliance		GDPR action plan in progress. Highlights include: <ul style="list-style-type: none"> • Data cleansing in housing management system • Awareness & training • Appointment of joint Data Protection Officer for CBC and CBH • Data asset register on Flowz system – further work to be done (Flowz to be replaced with M365 app) • Data breach app in place • Agreements in place with suppliers & partners

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
						<ul style="list-style-type: none"> Privacy Impact Assessments Reviewed data protection policy to align with CBC policy.
	SharePoint Implementation - focus on Security	IT & Support Manager	March 2020	Audit sign – off No breaches reported to ICO	 	Audit carried out by Mazars March 2020. A number of recommendations in place, e.g. new Information & Security policy, acceptable use policy, ICT risk register. Other recommendations in progress, e.g. data classification, regular reviews of access & sharing.
Basing decisions on business intelligence	Creating synergies between Business Intelligence, Customer Insight, Service Improvement & ICT teams	Head of ICT & Business Intelligence	April 2020	Service Plan developed with % Completion	 	New posts of Director of Business Improvement and Head of ICT & Business Intelligence created. Organisational structure to be reviewed starting 2019/20 to maximise synergies and focus on customer insight.

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
	Use best practice from housing sector and beyond to improve services	CMT	March 2020	Number of processes reviewed using evidence of best practice		HouseMark results to be used to identify high performing organisations. Members of HouseMark voids group and HQN Asset Management group. Recommendations on best practice in complaints handling implemented.
	Develop and Implement approach to Cost/benefit assessments, business cases	Head of Finance	Sept 2018	Number of cost/benefit assessments & business cases	 	New approach in place for ICT-related proposals. Needs to be developed for all non-budgeted activities (especially Service Improvement initiatives) Scope of Cost/benefit assessments and business case template to be agreed with CMT
	Developing productivity measures, KPIs / scorecards	Head of ICT & Business Intelligence	March 2021	Intelligence based business decisions, performance focused	 	Balanced scorecards in place – further development and embedding needed. Balanced scorecards to be reviewed post Aurora.

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
				organisational culture		ICT & Business Intelligence review will consider generation & use of business intelligence to drive process improvement. (See also People and Leadership plans)
Directing resources to where they are needed most	Use benchmarking strategically	Head of ICT & Business Intelligence	March 2019	Areas of focus identified & aligned with strategic priorities & investment plan		Areas of focus and actions to be identified from HouseMark results. Less progress than had been hoped on this but Programme 2020 review should allow a refocus of resources.
	Clear direction from CBC and target-driven Medium Term Delivery Plan	Corporate Management Team	March 2020	MTDP Targets		Target-driven Medium Term Delivery Plan in place, along with new reporting format. Positive feedback on streamlined approach

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
	Future Proofing the accommodation needs of CBH (and CBC)	Corporate Management Team	March 2021	Desk occupation rate/accomm odation costs/alternative solutions	 	<p>Reviewed in 2019 - utilisation surveys completed pre and post the working smarter project which shows Rowan House has enough hotdesks available if GLHO or Gosbecks were closed. More space required if all satellite offices were closed.</p> <p>Short and long-term office accommodation requirements under review again as a result of COVID-19 pandemic.</p>
	Review of drop-in areas in Library, GLHO, Gosbecks and Sheltered offices	Head of ICT & Business Intelligence	March 2020	Most cost effective use of office resource which meets staff requirements		<p>Hotdesk areas are just as quick to connect, charge and work. No further review required.</p> <p>Rowan House office accommodation reconfigured to facilitate social distancing (max 33 desks).</p> <p>Virtual appointment booths being considered for Greenstead Office.</p> <p>Housing Options team will no longer be based in the Library.</p>

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
Ensuring our processes are efficient	How to capture, report and communicate VFM & Return on Investment	Head of Finance	Sept 2018	£ target for each service/comp any wide	 	Reviewed Vfm activities at 2018 Away Day and implemented quarterly progress reviews took place with Heads of Service. To be reviewed with new Head of Service in post. Need to develop Vfm measurements and benchmarks and discuss at CMT
Supporting a culture of high performance and continuous improvement	Training and development to promote a Value for Money culture within CBH	Director of Business Improvement & Head of Finance	March 2022	Part of Induction and recruitment process, PADS, reporting etc. £ cashable savings achieved pa		To be reviewed with new Head of Service.