



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 <p>October/November 2021</p> <ul style="list-style-type: none"> • Corporate management team • Operations & Performance Committee 					
Approved	Board 01/12/2020					
Next review	31/03/2022					
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

Version	Type	Date	Notes
			Improvement. Cashable savings progress KPI added.
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.
1.4	Minor amends	November 2021	Final annual review – reviewed by Ops & Performance Committee



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 Improvemen t Manager	April 2021	Low cost per property Increasing customer satisfaction.		Balanced scorecards introduced per team Balanced scorecards launched April 2019. Monthly performance exception report and complaints/enquiries reports reviewed by CMT.
	Prioritise & earmark specific investment	Head of Finance	Sept 2018	£ Invested		Funds requested and agreed from reserves to fund transformation projects and other strategic priorities.

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
	projects and how they will be funded from efficiencies		Oct 2020	Resident feedback / compliments		
	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)		<p>Social value measure developed for Community Plan – incorporated into procurement processes and reported as part of Community Plan.</p> <p>Social value included in NEC contract.</p> <p>Social Value portal in place for contract procurement. We have started publicising tender opportunities which include social value as part of the quality evaluation.</p>
Using technology to work smarter	Produce a Technology Plan covering the investment, resources,	Head of ICT & Business Intelligence	March 2018	Plan approved		Plan produced & agreed by Corporate Management Team November 2018 and subsequently incorporated into Value for Money & Technology Plan.

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	training and organisational structure required					
	Improve integration between systems and keep number of systems to a minimum	Head of ICT & Business Intelligence/ ICT Manager	April 2021	Reduction in number of discrete systems in place		<p>Project Aurora delivered integrated system, reducing the number of systems. Decommissioning of legacy systems has begun, generating savings for CBC. Decommissioning report with CBC for sign-off.</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.</p> <p>Assure Health & Safety system decommissioned, saving £28K pa</p> <p>Further developments will be in line with new CBC ICT strategy to rationalise/minimise systems.</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		New post of Head of ICT & Business Intelligence created in senior management review 2019. New ICT & Business Intelligence structure in place from August 2020, integrating teams and focusing on delivery of business priorities.
	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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	Agree an approach to minimum IT skill expectations for new and existing staff	Corporate Management Team	Dec 2021	Agreed approach in place		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. Limited progress due to capacity of ICT team & focus on business critical priorities.
	Improve access to data whilst mobile working	ICT Resources Coordinator/ ICT Manager	April 2021	% staff who say access to data while mobile is having a significant/critical effect on their productivity (currently 58%)		New housing management system include mobile working solution and provides online/offline access to data, reducing reliance on good connection and tethering. Rollout of new handsets to replace problematic EE Hawks, resulting in improved connectivity, although issues remain re mobile connectivity across the borough – high number of blackspots.

Focus	Actions/projects/workstreams	Lead	Due by	Success measure	Progress	Notes
	External review of WiFi/connection speed and how we use it	ICT Resources Coordinator		Review complete and recommendations implemented		Upgraded connection rolled out at Greenstead office and sheltered schemes.
	Put in place electronic form filling, e.g. from tenants' homes	ICT Resources Coordinator/ ICT Manager	April 2021	Number of paperless processes available from tenants' homes		<p>New NEC system facilitates more mobile working from tenants' homes as well as enabling online transactions via tenant portal (phase 2, July 2021).</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> <p>Electronic signatures in trial phase for lettings team.</p>

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	Use technology for better collaboration	ICT Resources Coordinator	Sept 2021	Number of SharePoint sites, project sites in place		<p>Remote collaboration via Teams and SharePoint fully embedded.</p> <p>Integrated housing management system supports visibility of information across service areas and potential for workflow.</p> <p>A number of Microsoft apps have been developed and are in use, e.g. electronic purchase orders etc.</p> <p>New Lloyds credit card portal facilitates better visibility, workflow and reporting.</p>
	Use technology to support communication and cross-company working (e.g. SharePoint, messaging)	ICT Resources Coordinator	April 2021	Consistent messaging/telephony solution % staff using Yammer, Instant		<p>Microsoft Teams now widely in use throughout the organisation for videoconferencing/calling and messaging. MS Teams used for all staff broadcasts and video messages by directors and Board members.</p> <p>Better mobile handsets rolled out.</p> <p>Yammer used successfully for wellbeing initiatives, staff compliments etc.</p>

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
				Messaging etc.		
	External review of how we use SharePoint	Head of ICT & Business Intelligence	Sept 2020	Review complete & recommendations implemented		Mazars audit completed March 2020. A number of recommendations implemented.
	Harmonise SharePoint working practices (file saving, file access, how staff work on documents, Apps, Forms)	ICT Resources Coordinator	April 2021			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 Reviews of permissions and external sharing carried out.

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	Review to ensure all technology/hardware provided is adequate for all job roles	ICT Resources Coordinator	Sept 2020	% staff happy with how CBH supports them with technology		All 2-in-1s replaced with laptops - completed October 2020 All EE Hawk mobile handsets replaced Tablets purchased to support mobile working via NEC housing system Rolling budget identified for replacement of ICT equipment. Significant increase in satisfaction from staff on equipment provided.
	Use technology to improve the Board/Committee experience for Board Members.	ICT Resources Coordinator / Head of HR & Governance	April 2020	% Board satisfaction with process		Board meetings now taking place on MS Teams & Zoom. Convene software in use.

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	Use technology to negate travel, such as Skype and teleconferencing	ICT Resources Coordinator	Sept 2021	% of staff who spend 2 hours or more a week in face to face meetings (currently 43%)		<p>MS Teams has facilitated the move to remote working. Significant savings in mileage & other running costs.</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. Build of NEC dashboards delayed due to critical priorities during Aurora implementation – to be deployed during 2021/22 review of performance management framework, available tools and requirements.</p> <p>Need to consider best options to link up different data sets using additional reporting tools, e.g. Business Objects, interactive</p>

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						queries by NEC users, system reports, built-in dashboards. Business Intelligence Officer exploring Power BI (in use by CBC)
	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 but there is significant scope for further development, both on the technical side and in terms of data quality. NEC Housing system will provide quasi-real time information via the dashboard functionality – delayed launch later in 2021/22.
	Improve access to data and forms through IT	ICT Manager	April 2021	Direct access in place for Housing Management systems reporting		Business Intelligence function integrated into ICT team, facilitating better access to data.
	Ensure offices are enabled for smarter working	ICT Resources Coordinator	March 2020	All office spaces Wi-Fi enabled &		All spaces WiFi enabled. Gosbecks and Rowan set up for hotdesking.

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
				with hot desk capability		
	Increase automated processing	Corporate Management Team	Sept 2021	Number of processes automated		<p>A number of processes have been developed using Microsoft PowerApps, e.g. electronic purchase orders, asset management raising 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>There is significant scope for automation in NEC - workflows/task manager will feature heavily in post Aurora project and beyond. Forthcoming reviews of processes include Right to Buy, complaints, transfer incentives, rechargeable repairs, voids, leasehold gas certificates, including automation where possible.</p>
	Improve website functionality for	ICT Resources Coordinator/	July 2021	Number of processes		New website launched April 2019.

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	residents and staff	ICT Manager		available online	  	<p>Ongoing improvements made - improved tenant alterations & repairs functionality, Housing Options web pages, reporting of complaints and enquiries.</p> <p>Work in progress to review & improve website accessibility. Accessibility statement in place.</p> <p>Tenant inspectors reviewing website Q3 2021/22.</p> <p>Customer portal will be available via NEC Housing Online during 2021/22, enabling tenants to view and check rent accounts and report some repairs online.</p>
	Promote staff self-service using technology	CMT	Sept 2020	Number of helpdesk tickets raised where FAQ/online guide available.		<p>Interactive reporting available in NEC Housing.</p> <p>Password resets, tips & tricks on Yammer Regular SharePoint updates Drop-in & 1-1 sessions for SharePoint</p>

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						ITrent now being used for self-serve HR processes, e.g. sickness, expenses, annual leave.
	Compliance with GDPR requirements	Head of ICT & Business Intelligence	March 2022	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 M365 app • Data breach app in place • Agreements in place with suppliers & partners • Privacy Impact Assessments • New policies on data protection, retention & processing of special category data policy to align with CBC policy • GDPR responsibility now sits with ICT – Director of Business Improvement

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						<p>nominated as Senior Information Risk Officer.</p> <p>Planned & ongoing work includes:</p> <ul style="list-style-type: none"> • Further general & specialised training across the business • Working through recommendations from CBC GDPR audit in preparation for CBH GDPR audit in 2022 • Review of legacy data
	SharePoint Implementation - focus on Security	ICT Resources Coordinator	March 2020	Audit sign – off No breaches reported to ICO	 	<p>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.</p> <p>Other recommendations in progress, e.g. data classification, regular reviews of access & sharing.</p>
Basing decisions on business intelligence	Creating synergies between Business Intelligence,	Head of ICT & Business Intelligence	April 2020	Service Plan developed with % Completion	 	<p>New posts of Director of Business Improvement and Head of ICT & Business Intelligence created.</p> <p>Service reviews creating integrated ICT team incorporating former housing systems team,</p>

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
	Customer Insight, Service Improvement & ICT teams					ICT support team, business intelligence & GDPR. Creation of new Customer Experience team with a focus on customer feedback & customer insight..
	Use best practice from housing sector and beyond to improve services	CMT	March 2020	Number of processes reviewed using evidence of best practice		<p>More focus on HouseMark for best practice – participation in HouseMark monthly pulse surveys & Covid reporting during pandemic. Increased attendance at HouseMark best practice webinars.</p> <p>Members of various networks organised by HouseMark, Housing Quality Network, Chartered Institute of Housing, National Federation of ALMOs. Best practice groups include some new ones (e.g. building safety, resident involvement, complaints). Expected increased participation in these during preparations for Social Housing White Paper implementation.</p> <p>Recommendations on best practice in complaints handling implemented.</p>

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
	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 and register established containing VFM activity savings.
	Developing productivity measures, KPIs / scorecards	Head of ICT & Business Intelligence	March 2021	Intelligence based business decisions, performance focused organisational culture		Balanced scorecards in place Performance management framework to be reviewed post Aurora. (See also People and Leadership plans)

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
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		HouseMark benchmarking visibility at Board & CBC level (e.g. management agreement review, Covid sector). Annual HouseMark report presented to all CMT, Board and Principal Liaison.
	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
	Future Proofing the accommodation needs of CBH (and CBC)	Corporate Management Team	March 2021	Desk occupation rate/accommodation costs/alternative solutions		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.

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
						Short and long-term office accommodation requirements under review again as a result of COVID-19 pandemic & Rowan House refurbishment – project in progress.
	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		Hotdesk areas are just as quick to connect, charge and work as drop-in areas. No further review required. Rowan House office accommodation reconfigured to facilitate social distancing (max 33 desks) – plans for future configuration agreed. Housing Options team no longer based in the Library.
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. Development of VFM Register and best method of capture and benchmarking.

Focus	Actions/projects/ workstreams	Lead	Due by	Success measure	Progress	Notes
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		New on-line induction highlights VFM culture. Training package still to be designed in order to promote culture within the organisation.