

## I Introduction

This is Westmoreland's first Customer Strategy - it sets out our current and future customer journey and the services we will offer over the next 5 years, to 2029. It will also help us better understand our customers and their experience of our properties and our services.

In 2022 Westmoreland agreed its organisational Values and set its Corporate Objectives for the next 3 years. These two combined set a framework for the approach we take to our customer service; in the design and delivery of our services, the partnerships that we develop and the approach that our staff take to customer relationships, whatever their role.

This Customer Strategy details the services we aim to provide and the partnerships we will develop so that our customers can live independently in their home, with care, support and the services they need to achieve a better life outcome. It also explains how we will learn from our customers' experiences, feedback to us and the data we collect to continually refine and improve what we offer, to give our customers a consistent and first-class service.

## 2 Who are Westmoreland?

Westmoreland was established in 2002 by the parents of an autistic child who wanted to find a way to provide a route to independent living. Over time we have grown and now manage 133 buildings, providing 626 homes.

We provide Specialised Supported Housing and advice for vulnerable adults in our society with Learning Disabilities, Mental Health Disabilities, Autism or Physical and Sensory Disabilities who need long term care and support. We aim to create better life outcomes for our customers through the homes and services we provide and through our partnerships with Local Authorities, NHS, Care Providers, customers and their families. As a national provider working across 60 Local Authorities, we provide homes by arrangement with Local Authority or NHS commissioners.

Westmoreland provides services to our customers through a network of Housing Officers who are local to our customers. They spend time in our homes with customers, their representatives and Care Providers to ensure that all of their housing needs are taken care of and to facilitate anything as required with our partners to make sure their home and care remains right, and queries are resolved. They also ensure that all the health and safety checks have been carried out. Our own repair surveyors also visit our customers and properties to resolve complex property issues and understand the quality of the property over time through stock condition surveys. This survey ensures that we plan to spend money in the right place each year.

We also provide services from our Head Office such as gardening and cleaning, a specialist Housing Benefit service, utility management, rent collection as well as all of the property, financial and administration required to provide the frontline services.

To provide the property and services that we do, we work in partnership with a range of organisations:

- Local Authority/NHS Commissioners – they take the lead in assessing demand and appointing care providers
- Care Providers – they provide the care to our customers in their homes
- Developers – work with Commissioners to procure and develop appropriate new to market properties
- Repairs contractor – they provide a 24/7 responsive repairs service, carry out all health and safety certification and carry out planned projects
- Housing Benefit departments – we liaise with them directly to ensure that customers' rent is paid and all queries and reviews taken care of

- Our Landlords – we lease our properties and the landlords have responsibilities to make sure the building meets energy efficiency legislation. They also provide the funding to bring new properties into the market
- Regulator of Social Housing – They provide the Regulatory Framework in which we work

## Our Performance

We hold ourselves to account for our performance, as do our customers and partners. From April 2024 we will report on the Tenant Satisfaction Measures and publish the results. We also provide information on our activities throughout the year in our Customer Annual Report which is published each September. As part of our repairs and maintenance contract we report internally on repairs cost, speed and health and safety compliance as well as levels of occupancy and income collection as this drives the amount of money that is available to provide services to our customers.

The performance data that we collect is used to identify areas of improvement in our business that will have an impact on the services we provide. One area that we will be expanding throughout the period for this strategy is direct feedback from customers and their representatives on the individual services that we provide – especially our repairs service and housing services. We are already working with our partners to develop the processes to do this effectively so that we can learn and constantly improve.

## Growth

It is our aim to provide circa 100 new to market homes every year. We work with our partners to develop new properties that meet the demand that the Commissioners have identified. By doing so we are increasing the supply of accommodation to the market and the quality that is available. To ensure that we can provide appropriate services, we will only grow in the areas of the country where we already work, rather than expanding further afield and diluting our operational capacity.

All of our services are guided by our Corporate Objectives and our Values. These set a framework that the services we provide and how they are delivered are shaped. A summary of the Objectives is below – Year 3 is at March 2025.

Corporate Objective	Summary
Governance and Compliance	At the end of Year 3, WSHL views itself as a compliant business
Capability	At the end of Year 3, WSHL is a systems and data led business with fit for purpose capabilities, scalable beyond 1000 units
Customer Engagement and Involvement	At the end of Year 3, WSHL is providing an effortless customer experience for a defined service scope that responds to customer needs

People	At the end of Year 3, WSHL is an employer of choice for this sub sector, with members who understand and have a direct connection with our Purpose
Growth	At the end of Year 3, WSHL will have called to 800 units of compliant and effective stock located in chosen geographies
Contribution to the SSH sector	At the end of Year 3, WSHL will be known as a positive force for good in the SSH sector

## Our Values

In 2022 we launched our first set of Values as an organisation. This was an important step for Westmoreland to provide focus on our future direction to continue improving and making us a success. Our staff worked together with members of the Board to develop Values to reflect Westmoreland's culture and approach to working with customers, partners and each other. We have since worked together to embed these values in how we go about our business. By working to our Values, we aim to deliver excellent services for our customers, be great partners to work with and continue to improve what we do through innovation and learning.

Value	Key Words	Description
We do the right thing	Honesty and Integrity	We are honest and transparent with ourselves, our colleagues, our beneficiaries, partners and other stakeholders. We choose to act with a consistent and uncompromising adherence to strong moral and ethical principles.
We deliver	Professionalism and Accountability	We consider that we have an obligation to our beneficiaries to act in their best interests at all times. We make decisions and complete activities for the benefit of our beneficiaries before any other stakeholders. We hold ourselves and each other responsible for our decisions, actions, or lack of actions. We continuously apply and seek to improve our technical and professional skill sets to maximise the benefits and value for money we can deliver.
We use New Thinking	Innovation and problem solving	We challenge ourselves to introduce new ideas or technologies to provide better ways of delivering a service that benefits our customers. We operate in a sector that requires broad-based improvement to improve value for money and customer outcomes; we actively seek to contribute to development of the sector overall.
We are one team	Collaboration and Inclusivity	We share knowledge and information and work together within and across organisational boundaries to deliver improved outcomes for our beneficiaries and to develop a stronger, more united voice. We have respect for the individual and aim to provide equal access to opportunities and resources for people who might otherwise be excluded or marginalised. All of our interactions are undertaken with due regard for the dignity, feelings, wishes, or rights of others irrespective of age, disability, gender, racial origin, religion, belief, sexual orientation, language, perspectives or opinions.
We are a learning organisation	Understanding and Curiosity	We use our interest in and empathy with those around us, our beneficiaries and other stakeholders to improve our understanding and learn better ways of meeting changing needs. We always seek to do better.

### 3 Regulatory Requirements

As a Registered Provider of Social Housing, Westmoreland is regulated by the Regulator of Social Housing. Their regulatory framework covers financial, governance and customer/consumer. The Regulatory standards have been updated from April 1<sup>st</sup> 2024. There are 4 consumer standards:

- **Safety and Quality Standard** – outcomes about the safety and quality of tenants' homes
- **Transparency, Influence and Accountability Standard** – outcomes about how landlords provide information, listen to tenants, and act on their views
- **Neighbourhood and Community Standard** – outcomes about how landlords work with other organisations to help ensure tenants live in safe neighbourhoods
- **Tenancy Standard** – outcomes about how landlords allocate and let homes and manage tenancies

In 2023 as part of our own governance procedures, we carried out an audit against the 4 standards as they were at that time and were then audited by external 3<sup>rd</sup> party experts. The audit showed that we met the requirements of the 4 standards and this was reiterated by the Regulator in July 2023. At Westmoreland we believe that we are in a good place to meet the revised standards and will again carry out a self assessment in 2024 to ensure that we meet the revised standards.

**The Decent Homes Standard** sets the minimum standards that social homes are required to meet and has been in place since the early 2000s. The standards are based on the age and quality of certain aspects of the home, such as windows, doors, kitchen and bathroom as well as its thermal comfort. To ensure that our customers are living in properties that meet the standard, we carry out stock condition surveys at each property every 5 years and update our long term planned maintenance priorities and programme in response. The plan is funded through the rent that is paid and the year by year plan is driven by a combination of the stock condition survey and some feedback from customers. We will develop our customer feedback on property priorities in the near future, to understand our customers' views on what is important to them in their property.

**Specialised Supported Housing** compliance is specific to this sub sector of social housing. For a property to be classified as such, there are 5 tests that must be evidenced. Through 2021, Westmoreland carried out a retrospective audit of each property to establish that it is SSH compliant. Any that were not compliant were over time removed from our stock or reclassified correctly. All new properties that are developed are confirmed as meeting the 5 tests in advance of taking it on. The 5 tests are:

- which is designed, structurally altered, refurbished or designated for occupation by, and made available to, residents who require specialised services or support in order to enable them to live, or to adjust to living, independently within the community;
- which offers a high level of support, which approximates to the services or support which would be provided in a care home, for residents for whom the only acceptable alternative would be a care home;
- which is provided by a private registered provider under an agreement or arrangement with a local authority or a health service (within the meaning of the National Health Service Act 2006);
- for which the rent charged, or to be charged, complies with the agreement or arrangement mentioned in paragraph (c); and
- in respect of which at least one of the following conditions is satisfied:
  - i. there was no, or negligible, public assistance, or
  - ii. there was public assistance by means of a loan (secured by means of a charge or a mortgage against a property).

**Tenant Satisfaction Measures** have been introduced for the first time in 2023, with the first results to be published from Summer 2024. This provides a national set of property and customer feedback and allows customers to provide scrutiny of our performance in the managing of homes and neighbourhoods. This will be a yearly survey and each customer and their representative will be invited to feedback on the questions set by the Regulator. The summary of the responses will be published, alongside an action plan to improve any areas of concern.

## 4 What Are the Benefits to our Customers and What Will Westmoreland Offer?

Westmoreland's role with our customers is more than that of a contractual landlord. As our customers have high levels of care, there are services that we currently provide and others that we will develop over the next 5 years that help promote and support independence and provide for better life outcomes for them than they would receive otherwise. This is not done alone, as we work with a range of partners to achieve our customers' and organisation's goals and objectives. Working with our partners is essential to delivering outcomes for our customers, as we all provide different elements towards a joint goal. This section explores what role Westmoreland plays by ourselves now and our aspirations for the future, and also covers how we work with partners to deliver services. Through the next 5 years we will focus initially on providing the fundamental, standard regulatory functions well and then develop our current services and provide new ones that are designed to meet each individual's complex needs, enabling them to live independent lives and helping to provide better life outcomes for our customers.

### Westmoreland's role

**Property** – Westmoreland will provide safe, secure and warm accommodation with modern facilities appropriate for a customer's current needs and where possible the ability for the property to be adaptable with changing needs. Our intention is that our properties are a home for life.

To ensure that our properties are safe we will always carry out the health and safety and compliance checks periodically – this ensures that every property meets the standards set in legislation as well as good practice for Specialised Supported Housing. We will report on the key outcomes from this in the Tenant Satisfaction Measures in Summer 2024. We have rigorous auditing procedures in place to ensure that all certification and remedial action is carried out and evidenced appropriately. The requirements may change over time as legislation is amended, but the principal of how we will manage health and safety will remain the same.

We will continue to refresh our stock condition surveys over a 5-year cycle. This ensures that we have an up to date view of the condition of the property and individual components. This data feeds into our investment programme for the coming years to ensure that we spend the contribution collected through the rent charged each year on the appropriate components. We want to develop this over the next 5 years so that customers can have some influence in the prioritisation of planned works in their property. We already encourage customers to be involved where we can in elements of choosing designs and colours, for example in replacement kitchens and other decoration, but we will expand that within the budgets that are set, to engage our customers in deciding what upgrades or replacements are of a greater priority to them, and not rely solely on our stock condition

surveys. We will also work with our landlords to ensure that all of our properties meet the energy efficiency (EPC) target of 'C' in line with current legislative timescales.

We will always provide a day-to-day repairs service. Our internal performance metrics say that this is performing well in terms of speed of response, completing repairs on time and cost. We are working with our repairs contractor to improve how we ask customers for their feedback on the quality of the work, whether our response times are good enough for their needs, the quality of the repairs team both on the phone and on site amongst other areas. This will be developed over the next 5 years, starting initially with feedback being sought at the completion of a repair, on the quality of the work and, subsequently, about the way we prioritise repair jobs and how we can tailor repair services more closely to an individual customer's needs. We will also explore the ability to carry out improvement or non-repair works for our customers on request that can be paid for directly.

The new properties that we add have to be of a good quality so that we can provide good quality accommodation in the long term. Although we have ensured to date that all new properties do so, we have not yet developed a property offer or standard that is published to all customers and partners. Although it will be flexible around the customers' needs for each new site, we will develop a standard in partnership with Commissioners, customers and developers that sets an offer and expectation of the property types and facilities that we offer.

**Housing Officers** – Our Housing Officers are the main point of contact for our customers, their representatives and our partners. Their role to date has been largely responsive – in working with Care Providers to let empty rooms, checking for repairs, health and safety compliance and responding to questions or information from customers. Our Housing Officers visit site once a month and are available via phone and email in the interim times. Over the life of this plan, we will expand how customers can engage with us through the development of our website and other technologies. We will also be more proactively involved with our customers in periodic care reviews with the Local Authority/NHS and care providers to make sure that we are able to respond to any changing needs, and the property and services that we provide continue to be appropriate for customers as their lives and needs move on. We will become adaptable and flexible to the needs of our individual customers, within a framework of what is within our remit to provide.

**Housing Benefit, Rents and Finances** – Westmoreland has a duty to ensure that our rents are appropriate for the type of accommodation we provide. Our rents are set to ensure that we can continue to provide the services that our customers need, but they need to remain affordable and compliant with the regulations, that rents are below that of the market. We carried out a review of our rent levels in 2021 and again in 2023 and will continue to do so periodically to ensure that our rents are not more expensive than others.



We provide a specialist Housing Benefit service that works directly with customers and the Local Authority to administer all aspects of Housing Benefit claims including applications, reviews, rent increases and any customer queries. This is an area of technical expertise and we will ensure that our staff remain trained and up to date with any changes in legislation and guidance.

We aspire to expand our benefits advice so that Housing Officers and our Housing Benefit team are able to help customers maximise their income through access to funding, through a detailed knowledge of the welfare benefits system and to assist customers with financial management and budgeting. We understand that this will require that our staff will need investment in specific training to hold the skills required. We want to expand our offer to include this to ensure that our customers have the best possible life outcomes whilst they are living with us.

To ensure that customers receive value for money for the services they receive, we will put in place the ability to benchmark the cost of our services with other providers in our field. We intend that this will lead to shared commissioning and procurement of services with other providers of similar services, so that our customers can benefit from the reduced costs that this would bring.

**Services** – We will continue to provide gardening, communal cleaning, window cleaning and gutter clearing. These services were taken in house in 2023 and the initial feedback we have received has been positive. We will continue to ask for feedback on the services we have delivered and will develop this over time to enable customers to influence the specification of these services to move away from a ‘one size fits all’ service. Additional services may include those that would be eligible under Housing Benefit regulations, or services that customers request and are willing to pay for directly. This will allow us to move to a more bespoke service that can better respond to the needs of individual customers and households.

## **Partnering**

To achieve the better life outcomes for our customers, Westmoreland does not work alone – we work closely with a number of partners to deliver the services that we do and will work with them to develop them further over the coming years. The benefits of working in tandem with our partners means that we can be more responsive to local demand and customer needs and will be in a better position to provide the joint housing and care for life or as long as it is appropriate for each individual. The following section shows a diagram of who our main partners are and a description of our relationship with each partner and how we intend to develop that for the benefit of our customers.



**Local Authority/NHS Commissioners** - All of our properties are provided in conjunction with a Local Authority or NHS commissioner. They understand the demand for property and service type that is needed in their area and work with Westmoreland to ensure that our current and future properties continue to meet their needs. They also appoint the care providers who provide the care to our customers. To ensure that we continue to meet the demand for commissioners, we will become more involved in long term strategy planning with commissioners in our key locations. We will also aim to become more involved in reviewing the care provided to our customers, both at individual customer level and by the care provider at the site as a whole. By doing so, we will have an influence on ensuring that our customers are having the best possible service in all aspects whilst they are our customer. We aspire to be more than just a landlord, and this is a key opportunity to do so.

**Care Providers** - We work very closely with our care providers. They are with our customers every day providing the personal care required and have very close links to family and commissioners; they are a significant part of the services we provide. Often, they are the first to identify and report property issues. Everything that we both deliver must be synchronised so that our customers receive a seamless service. Due to the nature of some

of our historical contractual arrangements with care providers this partnership has not worked as well as we would want, and we are continually developing and improving these relationships. This will move to include closer involvement by Westmoreland in care reviews and clearer guidance for all parties on the roles of the different organisations, where we work together and separately, where the boundaries are in our roles and how the clear lines of communication work. Alongside this will be better and more structured information sharing. This will help customers and other partners understand what they can expect from us and to work with us to improve and develop it further.

**Developers** – We work with a small number of developers to provide new properties to the market. To date this has been responsive to individual projects required by commissioners. As part of creating design standards, we will work with our developers to ensure that the needs and views of commissioners and our customers is taken into account when designing new sites. It is vital that we are able to bring new accommodation to the sector that meets the needs of commissioners and customers.

**Repairs Contractors** – As described earlier, Westmoreland provides a day-to-day repairs, property compliance and planned maintenance service through a central repairs contractor. Although the relationship with our contractor is established, we will look to develop the capability of our service in the way that we prioritise repairs and planned maintenance work using customer feedback, and how we tailor repairs better to individual circumstances. To do this we will use customer feedback and data analytics. We will develop how we do this and how we feedback the results to customers.

**Landlords** – The majority of our properties are provided to us on long term leases. Although the majority of the property liability is passed to Westmoreland through the lease, the landlords remain focused upon each property's long-term success and, as such, Westmoreland invests significant energy in those relationships. Successful relationships will see landlords invest directly into our properties where they can see a joint benefit in doing so, such as in improving energy efficiency. As a result of our strong relationships, we will see landlords investing significantly in underperforming sites over the next 5 years to bring them to EPC 'C'. The landlords also provide funding to bring new properties to the market in line with the needs of commissioners.

**Regulator of Social Housing (RSH)** – They provide the Regulatory framework in which Westmoreland operates and ensures that Housing Providers meet the standards required. Our relationship with them is of 'co-regulation' where it is Westmoreland's responsibility to 'self-regulate' and work with the Regulator when either we or they have areas of concern. As the regulatory framework evolves, we will work with them to ensure that the services we provide and how they are provided continues to meet their expectations.

Overall, the capture and use of data will be integral to the development, delivery and continuous improvement of all of our services. Although, at the start of this 5-year strategy

we do currently collect some data, our systems and processes are not yet strong enough to use it to the best effect for our customers. Across all areas of our services, we will use statistical data as well as formal customer and partner feedback to understand and track satisfaction, costs, demand and performance against targets to ensure that we are delivering services to our customers and partners in the right way. We will publish our key operating and performance data for customer scrutiny. This is an area that we will develop incrementally over the period.

## 5 How will we communicate with our customers?

How Westmoreland communicates with our customers currently is through prescribed formal routes, face-to-face visits and telephone or email. This gives the customer several routes to contact us but is generic in its format and does not take effective account of individual circumstances and preferences. Through our customer application process and our Tenant Satisfaction Measures, we ask our customers what their communication preferences are, and will use this data to improve our bespoke communication over this period.

As part of the landlord / tenant relationship, there are some formal documents and processes that must be completed and communicated in a prescribed manner, for example:

- Tenancy agreement – this is a standard document that is produced and signed by all parties. This document will always exist at the start of a tenancy, but we will look to move away from paper documents printed and sent via post, to a digital signing service where appropriate.
- Annual rent review – this must be sent to customers at home in a prescribed format once a year. For most of our customers it is received at the end of February to take effect from April. This must be received in person and in writing so the format and method will continue.
- Annual Customer Report – we have published our first annual customer report in 2023 and is available in print or via our website. Next year we will develop it further to include an easy read version.
- Tenant Satisfaction Measures – 2023 was the first year that we have been required to survey our customers and publish the results. The questions are prescribed by the Regulator, but the method to collect them is not. In the first year we are contacting each customer face-to-face and each appointee by letter and email. In future years we aim to provide the survey in the preferred approach that each of our customers has chosen. Our first results will be published in July 2024.

The channel of communication is unlikely to change over this period, but we aim to improve the appropriateness of each communication for the individual customer, ensuring the use of appropriate language and effective messaging.

The majority of our communication with our customers is face-to-face in their homes – our Housing Officers and Surveyors aim to visit each property monthly. This will always be a good way of understanding our customers' needs and dealing with any queries, but we know that this is not how every customer wants to be contacted or that the time we are visiting may not be convenient. Over the life of this strategy, we will develop our services to be more accessible, at a time and in a way that is more convenient. This could be through email, text messaging, social media or our website.

This will develop our website further to provide more information about the services we provide and to increase the level of available self-service and interaction with Westmoreland directly through our website. This will be iterative over time, and we will use feedback from our customers to prioritise which services to develop.

This year we changed our gardening service and brought the management of the contracts and services in-house. Following each visit Westmoreland staff have contacted the property to ask for feedback on the quality of the work and about the staff who attended. Whilst the feedback received so far has been positive, we are aware that not every customer has had the opportunity to feedback, including on the specification of the work done. Our current specification is standard across all properties and not tailored to each household – this is an area we will develop.

We will improve customer feedback routes across all our services – we plan to start with the most significant service area which is repairs and maintenance. We carry out around 3,000 repair jobs a year, so this is the most important and frequently used service we provide. We will work with our repairs contractor to develop a system to ask our customers for feedback, so that we can analyse the results to continually improve our services.

In 2023 we also appointed our first Board member as a representative of our customers. This was an important step in having an influence at the very top of Westmoreland and to provide scrutiny and direction in the services we provide to our customers. This is a relatively new role, but our intention as we grow and become a more mature organisation is to create a customer panel to give feedback to our Board on things that matter most to customers. This will be used to develop future strategy decisions, help with priorities and with the improvement and development of individual services.

## **6 Risks**

Westmoreland's existing services are built around certain assumptions and are designed to work well within those parameters. If there were any significant changes to the environment we work in, this could affect our ability to deliver services in the same way to our customers and this strategy would have to be reviewed.

The risks to the services delivered to our customers are from 2 sources; Westmoreland's ability to provide services and the Care Provider's quality and ability to provide appropriate care services. If for example should the existing funding models for care change, it could affect the ability of care providers to provide care in the domestic setting that they do with

us. It could also hamper the NHS/Local Authority's ability to procure services and no longer have a future need for the services we provide.

The rent that we charge is higher than that of the general housing market, as grant funding is not available. As a result our rents are considered exempt from the Local Housing Allowance by the Housing Benefit departments. If there were to be a change in the regulations that no longer allowed exempt rent, our properties would be unaffordable and we would not be able to provide the services that we do today and this would be a risk to our ability to provide accommodation.

Westmoreland will always strive to get the best value for money from the rent that we charge and collect and to provide the services that have the greatest impact for our customers. If the rent regime within which we work changes, or the services we are required to provide change, we will work with customer to ensure we provide what matters most to them.

The key professional relationship that we have is with our Care Provider – a failure to work well together will mean that our customers receive poor outcomes and opportunities. In conjunction with commissioners we will always carry out due diligence on the care partners that we work with to ensure that they provide good levels of care as evidenced by the CQC and Commissioners and are financially strong. This will make sure that we can provide a lasting partnership to provide housing and care services for our customers.

## **7 Summary**

This strategy brings together a view of the services that Westmoreland currently provides, both by itself and with our partners, and how we will develop and improve them over the next 5 years. This will be in 2 phases – the first is to ensure that we provide the fundamental services well, and the second phase is to develop our current services and provide new ones that are designed to meet individual's complex needs, enable them to live independent lives and help provide better life outcomes for our customers. This will be through developing our partnerships, creating stronger standards and using data and customer feedback to improve and develop new services. Westmoreland is committed to improving the specialised supported housing sector and working directly with our customers and partners to create improved and more personalised services.