



Draft Social Accounts

April – September 2014

Helena Homes is part of Helena Partnerships Ltd.

Registered in England and Wales. Company Registration No.4141767. Registered Charity No.1107073.

Helena Central, 4 Corporation Street, St Helens, Merseyside WA9 1LD

EXECUTIVE INTRODUCTION

Why Social Accounts? An Executive Introduction

At Helena we are committed to making a difference to the lives of our customers and the neighbourhoods they live in.

That's why each year as a business we carefully monitor every pound we spend, use our resources wisely, and maximise the return on our assets.

The more efficient our services can become and the more surplus we can generate, the more we can invest and the more effective we can be.

By putting together our social accounts we want to demonstrate to our customers and stakeholders that we take our responsibilities seriously and that the homes we build and the opportunities we provide are making an impact in our communities.

At Helena value isn't just about how much things cost, but how much good we can do too.

These accounts are our first and are in development. One area of development we are leading on is a research project with the Housing Association Charitable Trust (HACT), the aim of which is to measure the return to the business from social investment. This is an area that is central to community investment. As welfare reform continues, community investment becomes core to our business resilience: Healthy financially stable tenants will lead to a financially healthy business, which will lead to quality homes and services.

Rob Young, Chief Executive

HELENA PARTNERSHIPS

Helena Partnerships is a registered social landlord that was formed following a full housing stock transfer from St Helens MBC in July 2002. We own nearly 13,000 homes, the vast majority of which are in St Helens. Since 2002 Helena has invested £372m in improving its homes, built over 600 new homes and has a turnover of £64.5m.

In January 2012, Helena's Board agreed a twenty year vision which set out its aspirations for Helena's future. This vision included an aspiration to be:

- Community focused
- Socially orientated
- Engaging and empowering communities
- A facilitator and enabler
- Promoting independence
- Seeking social balance, loyalty and reward in the communities in which it works.

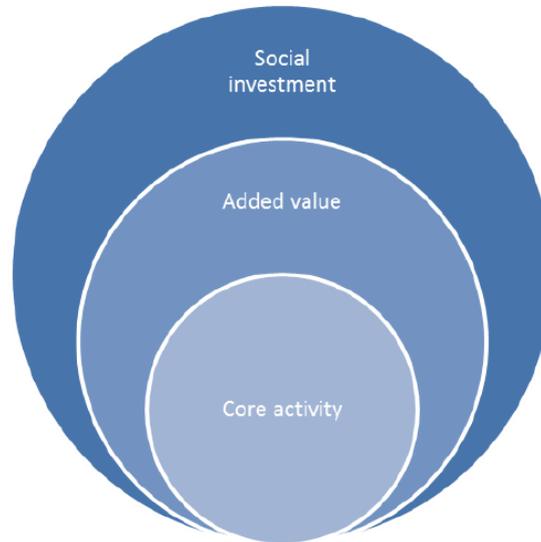
Since the publication of the Board's 2020 vision, the environment in which the company operates has changed significantly. The regulatory context has changed, placing greater emphasis on the need to evidence value for money and return on investment.

Welfare reform has impacted significantly on our ability to let our homes and our tenants to sustain their tenancies. These changes mean that our social investment activity needs to be more sharply focused with clear and measurable returns. This is reflected in how our social accounts are set out and will be developed.

Helena is preparing to enter into a group structure with Golden Gates Housing Trust in April 2015. These social accounts reflect the work carried out and the investments made by Helena Partnerships only. However they may form the basis that could be used to measure social value across the group.

Helena can do none of this work alone and works collaboratively with valued partners and stakeholders in the borough such as the Local Authority, St Helens Chamber, The Police, Merseyside Fire Service and Bridgewater Trust. The work carried out by our partners is not measured in this report but they are fully acknowledged here as being vital to the successful outcomes of these various initiatives.

Helena will seek social value from all areas of its business. This may arise from one of the following areas:



Core activity: This is activity that Helena would carry out if it was a purely commercial business e.g. building new homes, but there is a social value arising from this activity, for example, creating new jobs for local people.

Added value: Helena may carry out certain activities that aren't core to its purpose as a landlord – and would not do if it was a solely commercial business – but the activity has business benefit as well as social benefit. For example, promoting digital inclusion helps people to claim their benefits, look for work and pay their rent.

Social investment: This is activity that Helena decides to invest in purely for social return. If Helena does invest in this area of activity, a clear social investment case will be made based on the principles set out in this.

STRUCTURE OF ACCOUNTS

The accounts contain 5 strategic priorities laid out in our strategy. Each portfolio contains specific projects:

Employment and skills

Helena ICE
Moss Bank new build

Young people

Mentoring
Appleton Road soccer project
Make it Happen

Financial inclusion including debt advice and fuel poverty

Tenancy sustainment team
External Wall Insulation

Digital inclusion

Older person's inclusion project

Health and wellbeing

Health community assets
Staying home

The projects and services will be assessed against the following structure:

Context

To inform the assessment of the impact, effectiveness and efficiency of investments, the project needs to be set against contextual description and data.

Without this it would be hard to comprehend the problem to be solved.

Project aim:

The outcomes should be set against the aim(s) of the project, which should solve a problem related to the contextual information.

Project description:

This describes the actions completed to fulfil the aim.

Investment

This outlines the cost of the project including salaries

Outputs

Outputs are the numerical expression of the results of the project and investment.

Outcomes

Outcomes are the change that took place. The change should address the aim, be related to the context and supported by empirical evidence expressed in the outputs.

Return on investment

This summarises the measurable return within the timescale of the accounts and the initial investment.

Social value summary

This is a quick view of the results of the project.

HACT well being values

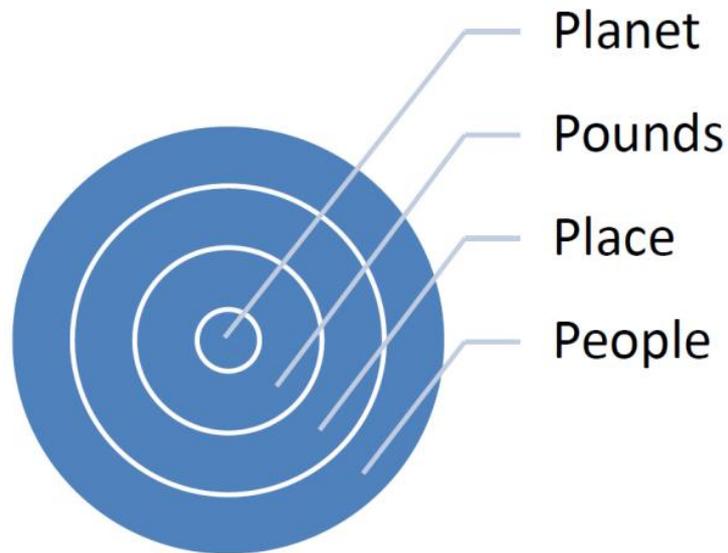
These are proxy financial values that reflect the monetary value of the increase in well being that the individual experiences as a result of a project. For example if a person experiences an improvement in confidence, the well being value is the equivalent financial value that the person would pay to achieve the same increase in well being. These values can be assigned to project outcomes. These values were developed by the Housing Association Charitable Trust (HACT).

Deadweight

Deadweight is the amount automatically deducted from the well being values (above) to reflect the percentage of value that would have been achieved without the intervention. This is intended to reflect a more accurate value that has been achieved.

MEASURING SUCCESS

We measure social return in terms of its impact in one of four areas:



Planet:

We measure the return in terms of a reduction in carbon emissions of the company, its activities or its neighbourhoods eg the energy efficiency of our homes.

Pounds:

We measure the economic impact of our activity eg from creating economic wealth or employment.

Place:

We measure the impact we have on key indicators used by our partners within the region to measure changes in priority areas such as health, educational attainment and crime.

People:

We measure the impact we have on the quality of life of the people living in our neighbourhoods using sector wide measures of wellbeing.

Impact is measured using one of the following four methodologies:

People – we will use HACT wellbeing measures to calculate the social value of initiatives. These include values for getting people into work, training and volunteering.

Pounds – we will use the following indicators:

The LM3 multiplier developed by Fusion 21 which shows the value to the local economy of a person gaining employment.

Information from Local Employment Partnerships (LEP) which shows the economic value of new build properties in creating/sustaining 2 jobs property.

Information from the Northern Housing Consortium/Sheffield Hallam study which shows the economic impact of our spend in the local area.

Place – we will use statistics from partners and our own intelligence to provide information on the impact we have on agreed indicators such as the level of young people not in education, employment or training.

Planet – we will use recognised values to calculate the monetary value of reducing our carbon footprint and the impact of energy efficiency measures in our homes.

We will explore the potential of obtaining external verification for our first full year set of social accounts (2014/15).

EMPLOYMENT AND SKILLS

Our employment social accounts show how we help our tenants into work by investing in their skills, removing barriers to work and working with partners. In particular it demonstrates the strategic emphasis we place on working with the private sector. We chose to invest our resources in the private sector as this is where the scale of employment opportunities exists that is needed to effect a substantial change in the number of employed tenants and where growth in jobs will come from.

INVESTMENT CASE

The business case for investing in our portfolio of employment initiatives is very clear. Welfare reform has created a very real risk to the income of Helena. One of the main ways to mitigate this risk is to help our tenants secure work so that they are no longer affected by welfare reform and are much more able to pay their rent. In this case community investment is an investment in business resilience.

Helena works to the principle that the financial health of tenants and the company are mutually dependent.

PROJECT: PRIVATE SECTOR ENGAGEMENT

CONTEXT:

The employment market is highly competitive with vacancies outnumbered by applicants. In particular for our tenants it can be a very difficult market to penetrate if they lack skills, confidence, have been out of work for a while and have no or limited access to the job network. To help our tenants obtain meaningful employment we have to help them access the job market. The majority of new jobs are in the private sector which is where economic growth will come from. So our strategic direction has been for many years to work with the private sector to find job opportunities. In addition many of our tenants will need help with gaining the skills needed to access these jobs as they either lack them or are a little 'rusty'.

PROJECT AIM:

To provide our tenants with employment skills and job opportunities.

PROJECT DESCRIPTION

We work with private sector employers to negotiate a deal on behalf of our tenants to secure job interviews and work trials. During this 6 month period we have worked with the following employers:

Aldi
Merseytravel
Browns Respite
Shift

We also work with our main partners St Helens Chamber to provide employability and vocational training to give our tenants to best possible chance of gaining employment.

INVESTMENT MADE

Staff time £28,000
Facilities £2,100

OUTPUTS

Tenants into work

Aldi 7
Merseytravel 4
Browns Respite 4
Shift 2

Tenants receiving support and training

Aldi 50
Merseytravel 10
Browns Respite 4
Shift 2

OUTCOME

Helena is sourcing job opportunities and employability training for tenants. As a result tenants are moving into employment and away from benefit dependency and finding an exit from the poverty trap.

The table below shows the social value generated using HACT's well being values

Outcome	HACT Well Being Value per person £'s	Outputs	Total value generated (minus deadweight) £'s
Employment	10,767	17	169,131

SOCIAL VALUE SUMMARY

INPUTS	£30,100
OUTPUTS	17 tenants into work 66 tenants received employability support/training
COST PER OUTPUT	£1,770 per tenant into employment
HACT Well Being Value	£169,131

RETURN ON INVESTMENT

Taking into consideration the competitive nature of the local job market and the relatively low position some of our tenants have regarding employment skills and experience the return from the investment is good. The investment costs are kept low by working with partners to provide training packages. Staff costs are necessary as there is a great deal of work involved in brokering jobs opportunities with the private sector, engaging tenants and organising the logistics of recruitment events and training.

Measured in terms of HACT Well Being Values the return on investment is high at 1:5.7 for every pound spent.

PROJECT: HELENA ICE

CONTEXT:

Many of our tenants are from deprived neighbourhoods, have been dependent on benefits and have limited resources. Frequently they may be at the point of gaining employment only to find that they do not have the final piece of the jigsaw such as a pair of work boots, a shirt and tie or money to get to their first day of work. This is an example of the poverty trap in which many of our tenants find themselves.

PROJECT AIM:

To actively remove barriers to work for our tenants, at the point of gaining employment and provide that small intervention that can help them lift themselves out of dependency and into work.

PROJECT DESCRIPTION

We created a small grants fund to which tenants can apply to remove a barrier to work. The value of the grants is up to £100 per claim and will typically cover:

- Interview clothing
- Work wear
- Safety boots and personal protective equipment
- Booking of CSCS card tests (to allow people to work on building sites)
- Travel vouchers for interviews

- Payment of medical assessments
- CRB checks
- Support with business start up costs

INVESTMENT MADE

Staff time	£1,000
Grants	£3,460

OUTPUTS

Number of ICE fund applicants	81
Number of tenants with financial barriers removed	60
Number of tenants who have now moved into work	39

OUTCOME

Helena is actively removing barriers to employment being experienced by our tenants. As a result tenants are moving into employment and away from benefit dependency and finding an exit from the poverty trap.

The table below shows the social value generated using HACT's well being values

Outcome	HACT Well Being Value per person £'s	Outputs	Total value generated (minus deadweight) £'s
Employment	10,767	39	388,066

CASE STUDY

Jason says

"Without this help I wouldn't have been able to get this job as I had to be in for 7:30 am with boots. I would have struggled to get into work without a bus pass, it has been an hour and 15 minutes walk each way. Helena is also going to help with my CSCS card which I need to keep working on site."

Jason is a new tenant who heard about ICE when receiving the keys to his property. He had been looking for work since October 2011. Just a few days after hearing about Helena ICE, Jason was offered a job on a construction site, on the condition that he would turn up first thing the following day with work boots and appropriate site wear. Jason had clothes to wear which would do until payday, but he didn't have boots. He asked all of the family and friends he could think of, but had no luck. Nobody could lend him the money. At 3:45pm Jason remembered about the ICE fund and got to Helena Central's reception as soon as he

could. Through quick work and collaboration between staff Jason got his boots that afternoon. He also received a bus pass for a week to get him through to pay day as he had to walk for an hour and a ¼ each way to work and guidance from a National Careers Service Advisor. As a result Jason has secured his new job at JW Roberts.

SOCIAL VALUE SUMMARY

INPUTS	£4,460
OUTPUTS	81 Grants 60 Barriers removed 39 Tenants into work
COST PER OUTPUT	£114 per tenant into employment
HACT Well Being Value	£388,006

RETURN ON INVESTMENT

The yield from the investment in Helena ICE is high. The investment costs are kept low by employing a simple, deliberately non bureaucratic and paired down administrative grant process: Meaning staff time is kept at a minimum while maintaining a flexible and responsive service. In addition the grant levels are capped at a maximum of £100. Although we do retain an ability to pay more if there is a clear business case. Despite the low values of grants they are very effective at removing a barrier to entering into employment: Therefore the return on investment is high. This return is measured in terms of HACT Well Being Values.

PROJECT: MOSS BANK NEW BUILD

CONTEXT

The rate of unemployment in Moss Bank is 50% higher than the national average with 200 people claiming job seekers allowance.

Nearly a third of those aged 16 and above has no qualifications.

PROJECT AIM

To create employment opportunities from our investment in the new development programme for our tenants.

To recruit our tenants to these opportunities.

PROJECT DESCRIPTION

Helena contracted Lockwoods Group to build 22 new homes in our Moss Bank neighbourhood. The employment team and the development team negotiated with Lockwoods to create employment opportunities from this investment for our tenants.

As a result 5 employment opportunities were created including a trainee project management position and 4 timber frame construction apprenticeships.

An event was organised with JCP and St Helens Chamber to target and recruit local people to the opportunities. Those who attended and applied received employability training, an introduction to the employer and application and interview support.

INVESTMENT MADE

Staff time	£1,000
Development Budget	£2,500,000

OUTPUTS

Employment event	1
Ring fenced opportunities for tenants	5
Tenants attending event	110
Tenants gaining CSCS cards	5
Tenants gaining joinery skills	4
Trainee Project Manager	1
Apprenticeships	4

OUTCOMES

Unemployed tenants and young people living in our households in Moss Bank are gaining skills, CSCS cards and employment and apprenticeship opportunities from our new development programme.

The table below shows the social value generated using HACT's well being values

Outcome	HACT Well Being Value per person £'s	Outputs	Total value generated (minus deadweight) £'s
Employment	10,767	1	8,531
Apprenticeship	2,353	4	5,970

SOCIAL VALUE SUMMARY

INVESTMENT	£2,500,000 Helena £395,000 HCA Grant
OUTPUTS	4 apprenticeships 1 trainee project manager
COST PER OUTPUT	1 job/£480k
HACT Well Being Value	£14,501

RETURN ON INVESTMENT

The return on investment is addressing the contextual issues of structural unemployment and lack of opportunity for young tenants and residents on Moss Bank.

The return on investment for these specific development sites in Moss Bank was high. The ratio of 1 employment opportunity for every £480,000 in construction costs is a good rate of return. Additional value was gained from upskilling in joinery and CSCS cards.

The return will also include sustaining and creating jobs in the construction industry and related supply chain in the regional economy.

The resale value of the stock is estimated at £3,080,000

YOUNG PEOPLE

Our social accounts regarding young people reflect our intention to help young people make progress and overcome barriers in their lives. We recognise that working with young people necessitates patience, long term investment and a range of different projects. Our approach is mainly a developmental one rather than one predicated on outputs.

However we will also strategically target short term interventions in specific geographical areas where there is evidence of young people's behaviour that is consistently disturbing the quiet enjoyment of our tenancies. We recognise that this behaviour is merely an external symptom of other internal issues effecting young people such as boredom and lack of self control.

INVESTMENT CASE

Investing in young people is a priority for Helena's Board of Management. The board wishes to leave a legacy of having helped young people become:

'active, healthy citizens, making a **positive contribution** to their community and **engaged** in making decisions that affect them. They have **aspirations** for their future to live **independent** lives and they are equipped to make positive **lifestyle choices.**' A Strategy for Young People 2012 - 2017

In St Helens, as well as nationally there is an underlying structural problem of long term unemployment. There is lot of work by organisations to control NEET figures for 17 to 18 year olds. However provision after 19th birthday drops off and around a third of JSA claims are by those under 25.

The business case for investing in our portfolio of young people projects initiatives is very clear. Young people are our future tenants and citizens. By investing in them we are investing in the future of our communities, tenants and the business.

PROJECT: MENTORING

CONTEXT

The young mentees we work with have multiple barriers to education, training, housing and work. Many have complex needs and are struggling to forge just an existence from within challenging circumstances. We have worked with young people whose lives do not yet sit high on the spectrum of opportunity. Typically they may experience the effects of low educational achievements, a lack of vocational training, unstable housing and family background and disruptive peer influence.

PROJECT AIM

To provide young residents and tenants who are experiencing multiple and/or substantial barriers with long term support and guidance to help them identify life goals, overcome obstacles and make progress in their lives.

PROJECT DESCRIPTION

We employed a full time mentor to work with between 10 and 12 young people on a long term basis. Young people receive at least weekly one to one sessions. During which they identify their goals and barriers which they wish to overcome in order to achieve those goals.

Many of the young people have a complexity of needs and deeply embedded issues. So we work with them, planning, supporting, coaching and reflecting until they are ready to move on.

INVESTMENT

Staff time	£28,083
Grants	£2,219

OUTPUTS

9 mentees engaged in this period

OUTCOMES

The impact on young mentees is carefully considered and monitored using star diagrams. This is a very illuminating self assessment tool that is completed under guidance from the mentor.

The social value gained is also monitored by recording the recording the practical steps completed by the mentees in their action plan.

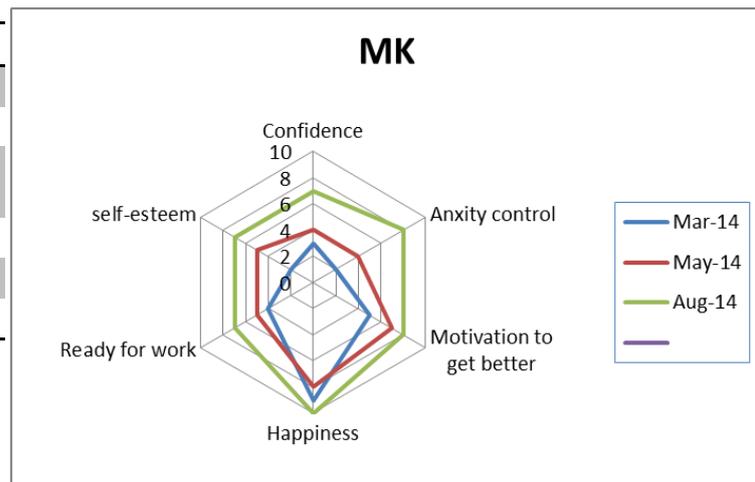
A summary of the outcomes gained for the young mentees based on the above methodology is outlined below:

- Gained Confidence and self esteem.
- Able to recognise barriers to (education/employment) opportunities and identify strategies to overcome them.
- Gained practical skills related to finding employment and training (job searching, application filling and interviews).
- Gained advice, guidance and support for housing/tenancy related issues.
- Recognise barriers to effective communication and developed strategies to overcome them.

- Acquired skills to challenge (internal and external) oppressive behaviour, negative attitudes and values that may be harmful to self and others.
- Able to consider the consequences of personal actions and decisions on self and others.
- Gained new skills and knowledge from attending training/education.

Below is an example of the STAR assessment system used to measure the changes in young people’s attributes (outcomes) during the mentoring programme.

	Mar-14	May-14	Aug-14
Confidence	3	4	7
Anxiety control	2	4	8
Motivation to get better	5	7	8
Happiness	9	8	10
Ready for work	4	5	7
self-esteem	2	5	7



RETURN ON INVESTMENT

The numbers of mentees is necessarily low to facilitate a long term and intensive mentoring programme. Therefore the output ratio against costs will be low from this project. If this approach were not adopted we would not solve the problem we set out to solve. Therefore seeking higher gain in terms of numbers would be self defeating.

However the yield in terms of outcomes is rich in range and in terms of longevity of impact. When set in context the outcome based return on investment from mentoring is high. The main costs are salaries with grants and expenses kept controlled.

The return on investment and depth of outcomes is reflected in the range of HACT Well Being values that are achieved by the project in the table below. All outcomes are tracked individually and recorded on an outcomes framework.

As this is a long term project some outcomes are not reported in the 6 month period as they may be evidenced in the following period.

The table below shows the social value generated using HACT's well being values

Outcome	HACT Well Being Value per person £'s	Outputs	Total value generated (minus deadweight) £'s
Improvement in confidence	£9,283	7	£32,048
Feeling in control of life	£12,470	5	£28,748
Full-time employment	£10,767	1	£10,271
General training for a job	£1,567	6	£12,784
Vocational training	£1,124	5	£7,642

Mentoring is an investment in young people themselves. So the outcomes are measured mainly in terms of personal development. Some of this personal development can be given a financial value.

SOCIAL VALUE SUMMARY

INVESTMENT	£28,083
OUTPUTS	9 Young mentees
COST PER OUTPUT	£3,120
HACT WELL BEING VALUE	£91,493

PROJECT: APPLETON ROAD SOCCER

CONTEXT

Residents on the Appleton Road were reporting a high incidence of disturbance due to noise and conflict of life styles between young people and tenants. Tenants were frequently reporting a disturbance to the quiet enjoyment of their tenancies when young people were playing football and running in and out of communal entrances.

PROJECT AIM

To reduce the disturbance to tenants quiet enjoyment of their tenancies through engaging young residents in a positive activity.

PROJECT DESCRIPTION

Community volunteers from PECTRA consulted with young people on the neighbourhood who requested a soccer project.

A soccer coach was commissioned to organise and run a controlled soccer project on the neighbourhood during the summer and early autumn and work with the young people on considerate behaviours.

INVESTMENT

Staff time	£225
Soccer commission	£3,320

OUTPUTS

Soccer project delivered	7 months
Young people engaged	32
Cost per young person	£110

OUTCOMES

There was a reduction in calls to Helena and Merseyside Police regarding noise and other disturbance of 91% over the course of the project.

A range of young male and female people were engaged from 7 to 18 year olds: Although the participants in the soccer were predominantly young males.

Young people were trained as soccer coaches so they could encourage other young people play and coach sports skills.

In addition community members, mothers of the young people were engaged to develop youth projects.

Following liaison the Council's Sports Development Team will

Take over the project and work with the parent/volunteers to increase their skills.

RETURN ON INVESTMENT

The return on investment for our tenants is improving the quality of life. The return also includes valuable outcomes for the company, young people and community volunteers.

This was a low cost high return investment.

For a financial investment of £3,320 and staff time of 15 hours there has been a substantial reduction (91%) in the calls regarding ASB and therefore a reduction in the staff costs associated with this.

The average cost just for a call out (without follow on work) for the Police is in the region of £200. The number of calls regarding ASB in the 3 month period before the project was 22. In the period during the project the number of calls reduced to 2.

Young people in our neighbourhoods were learning more considerate behaviours: They have been misusing the communal entrances far less and the on site Helena project officer has reported a marked change in attitude and respect.

There has been an increase in community capital. Mothers volunteered to run projects for young people and will receive support and training from the local authority's Sports Development section.

SOCIAL VALUE SUMMARY

INVESTMENT	£3,320
OUTPUTS	32 young people engaged 36 soccer sessions
COST PER OUTPUT	£98 per session
SAVINGS ON CALL OUT (Police)	£4,000



PROJECT: MAKE IT HAPPEN

CONTEXT

Residents have frequently communicated to us that they would like us to invest in more activities for young people. Many of our young people live in wards where the levels of deprivation are high. As a result young people have reduced access to learning, participatory and physical activity compared to that young people from other less deprived areas.

Helena is delivering a neighbourhood management approach – renew - in the boroughs most deprived wards. Renew is driven by local Partnership Boards which include tenants and residents. As part of this approach a funding bid was submitted to the Lottery to provide positive activities for young people.

PROJECT AIMS

To reduce involvement in ASB by young people engaging in free play opportunities.

50 new adult volunteers will learn new skills and have increased self esteem and interpersonal skills by project end.

500 young people will report improvements in health and social / interpersonal skills by the end of the project.

100 young volunteers will develop new skills and have increased ability to influence decision making by project end.

PROJECT DESCRIPTION

A Project Officer was employed to commission, co-ordinate and evaluate a 5 year programme of activity for young people aged 8 to 15. In addition the programme includes a volunteer development programme for both young people and adults. The programme is provided in three neighbourhood management areas: Parr, Thatto Heath, Fingerpost and Four Acre.

INVESTMENT

Salaries	£16,150
Activities	£30,000
Match funding from LA salaries	£6,000
Total	£52,150

OUTPUTS

Diversions activity sessions	307
Attendances at these sessions	5616

Children & young People registered	925
Different projects across the 4 re: new areas	30
Volunteers registered this year	35
Hours of volunteering by adult volunteers	169
Hours of volunteering by young people	199
Volunteer training sessions	16
Cost per attendance	> £9.00
Cost per activity	>£170



OUTCOMES

Nearly 1,000 young people are engaging and multiple times in positive community based activity: Thus reducing the potential for them to be involved in ASB or to come under the influence of negative behaviour.

The Young Person's steering group continues to engage young people in shaping the project and providing a platform for them to learn, increase confidence and communication skills.

Social capital is being built in deprived neighbourhoods as local volunteers are gaining new skills through training and experience of running play streets sessions and youth activities.

The table below shows the social value generated using HACT's well being values

Outcome	HACT Well Being Value per person £'s	Outputs	Total value generated (minus deadweight) £'s
Volunteering	£2,357	35	£46,616

Sustainability:

The project has 2.5 years left to run, the exit strategy is to upskill and empower each community to be able to run their own sessions. Progress includes:

- A new volunteer group delivering two sessions per/week.
- The continuation of a volunteer-led youth club.
- A community centre and volunteers establishing youth diversionary activities.

RETURN ON INVESTMENT

The return on investment is high. The ratio of return against the level of investment is very high: For an investment of £52k a return of 5,561 attendances at events/activities from young people was achieved at a cost £9 per attendance.

Just fewer than 1,000 young people are registered with the project.

In addition over 260 hours volunteer hours were achieved with a value of £1,934 (based on the minimum wage structure)



SOCIAL VALUE SUMMARY

INVESTMENT	£52,150
OUTPUTS	307 activity sessions 5616 attendances
COST PER OUTPUT	£170 per session £9 per attendance
HACT WELL BEING VALUE	£46,611

FINANCIAL INCLUSION INCLUDING DEBT ADVICE AND FUEL

INTRODUCTION

Our financial social accounts show how we work with our more vulnerable tenants to assist them with maintaining their tenancies. This includes assisting with their finances, whether that is with maximising income, budgeting skills or helping out in times of crisis when they are without enough food or money.

The Tenancy Sustainment Team is responsible for providing support to tenants experiencing difficulty in sustaining their tenancy; this can be because they do not have enough income or are struggling for example, with health or substance misuse. Each customer has a full assessment of their needs, completed by our Tenancy Sustainment Advisors, and positive interventions are put in place to address issues.

TENANCY SUSTAINMENT TEAM

CONTEXT

Welfare reform has created a real risk to Helena as a company. By investing in our Tenancy Sustainment Team, we aim to assist our vulnerable tenants to live independently, and sustain their tenancies. This is a win-win situation for the customer and company alike.

AIM

To support tenants to sustain their tenancies through a range of interventions that help improve income and help to increase personal independence.

WORK DESCRIPTION

We created a Tenancy Sustainment Team in December 2013, which combined various teams in the company including Tenancy Support, Titan (a team set up to deal with Welfare Reform), Domestic violence, and Money Matters Team. The combined skills and experience of these teams formed the Tenancy Sustainment Team. Individuals referred to the team are assessed in a holistic way, looking at issues from housing, income, money management, domestic abuse, employment, and health and substance misuse

INVESTMENT

Salaries	£89,121
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OUTPUTS

Grants/benefits applications	172
Grants/benefits awarded	167
Value of awards	£699,297
Grant success rate	97%
Average value per award	£4,187
Cost per grant	£534

OUTCOMES

Tenants are receiving support to maximise their benefits and increase their income. As a result tenants are receiving additional grants and benefits thus giving them some financial comfort and relief from being burdened with debt. This in turn may help them sustain their tenancies.

CASE STUDY: Stephen

Stephen lives on his own. He has severe disabilities. His benefits were in jeopardy of being stopped, and his tenancy put at risk, as he could not attend work related interviews. Due to the intervention of the Tenancy Sustainment Officer, Stephen's income was increased; he also received a backdated sum of £127.

"I thought the service provided was brilliant. I was receiving Work Related Employment Support Allowance (ESA) for 4 years, and was being told that due to my disabilities, I should receive Support Group ESA. One of your officers helped me with appealing the decision, and I am now receiving the support group ESA, which reflects my needs and I receive an extra £6.35 per week, which will help me with my tenancy costs"

RETURN ON INVESTMENT

The rate of return in terms of the value of awards for tenants is high. For every £1 invested in staff time tenants receive £7.85 in grant/benefit awards.

A case management system is currently being developed that will track the outcomes and improvements for tenants.

SOCIAL VALUE SUMMARY

INVESTMENT	£89,121
Grants/benefits awarded	167
Value of awards	£699,297

PROJECT: EXTERNAL WALL INSULATION

CONTEXT

Many of our tenants do not have a high income which makes maintaining a warm home difficult. Over 67% of our tenants are receiving a level of housing benefit. The average national household income is £40,000 a year. A couple with or without children on benefits will be living on income well below this level.

The majority of our homes have been insulated with cavity wall insulation and loft insulation. However some of our properties in Wargrave and Haydock had either no wall cavity or the cavity was very narrow. In addition some properties had either old and inefficient cavity insulation or a construction that caused cold bridging and cold spots on the walls. This made them energy inefficient, cold and expensive to keep warm.

Each property was subject to a RdSAP survey which provides a summary of the energy efficiency of a property and the projected savings following proposed work. Typical SAP energy rating for a property was 59 in band D which is a poor performance. In comparison a good performance in Band B would score above 81.

PROJECT AIM

To reduce the potential for fuel poverty experienced by our tenants, by improving the energy efficiency of housing stock.

PROJECT DESCRIPTION

All the walls of the properties were wrapped in external wall insulation which were then covered in a self coloured render.

To maintain a healthy air balance the properties were fitted with a 'Dry Master' whole house ventilation system. This will allow for fresh air to be introduced into the property while maintaining the integrity of the insulation.

In addition properties were fitted with solar thermal insulation which will harness solar energy to heat water.

INVESTMENT

Total project cost	£2,700,000
Helena	£1,350,000
European Regional Development Fund (Reach)	
Eco	

OUTPUTS

Properties fitted with external wall insulation	
Wargrave	235
Haydock	36
Properties fitted with whole house ventilation	
Wargrave	235
Haydock	36
Properties fitted with solar thermal insulation	84

OUTCOMES

The energy efficiency of the homes is being improved.
The cost of maintaining a warm home is being reduced.
The potential for our tenants to experience fuel poverty is being reduced.
A typical projected annual savings on fuel bills is over £400, a reduction in costs of over 40%.

CASE STUDY:

The team of environmental inspectors plan to survey tenants of these properties to see what benefits they have experienced and will hopefully be able to provide a case study.

RETURN ON INVESTMENT

An investment of this nature is high due to the nature of the work. The principle return can be seen as helping our tenants to stay warm by improving the energy efficiency of the properties. Secondary return can be read as potentially contributing to improving the demand for these homes, reducing turnover and arrears as they become more affordable to run. However, these last points are dependent on other many other factors and there is currently no mechanism in place to measure any effect on turnover, demand or arrears.

Over the long term and assuming price rises in the region of 7% over 10 years tenants potentially will benefit from over £5,500 of savings in heating bills.

Helena has managed to improve the energy efficiency of 271 properties at a cost £1,350,000 while drawing down £1,350,000 in external funding.

SOCIAL VALUE SUMMARY

Investment	£1,350,000
External funding	£1,350,000
Typical annual savings in fuel costs	£400 (current prices per property)
Total annual savings in fuel costs	£108,400 (figure not adjusted for price rises)
Total projected savings over 10 years	£1,497,699 (assuming 7% annual price rises)

DIGITAL INCLUSION

INTRODUCTION

Our Digital Inclusion accounts show how by increasing peoples skills in getting digital, we can help our tenants to become ‘modern citizens’ using the internet to save time and money and reduce risks around issues such as universal credit, social isolation, getting online savings etc.

INVESTMENT CASE

We chose to invest in Digital inclusion for three reasons. Firstly we want to ensure that tenants who need help with benefit claims and accessing other online services get the right help. Secondly we want people to get online so they can save time and money by using our own online services – this creates savings for Helena Partnerships and thirdly we want to deliver social impact for our tenants – as an example older people who learn how to sue Skype can become less isolated.

PROJECT: OLDER PERSON’S DIGITAL INCLUSION

PROJECT AIM

To reduce digital exclusion experienced by our older tenants by delivering local basic IT training.

PROJECT DESCRIPTION

The project is run in partnership with Adult Community Learning which delivers basic and introductory IT training courses to our older residents in eight of our sheltered community centres.

INVESTMENT

Staff time	£1,500
Course fees	£1,600
IT equipment	£0 (existing equipment)
Total	£3,100

OUTPUTS

IT courses	16
Sheltered schemes	8
Tenants attending	96
Tenants on line	96
Cost per tenant on line	£32
% of attendees completing course	100%
Delivery time	8 weeks per course

OUTCOMES

Helena's older tenants are becoming included in the digital world and 'getting on line'.

This in turn helps reduce isolation by enabling older people to contact family and friends on line, access wider opportunities and save money.

A very productive partnership with Adult and Community Learning has yielded great results for our older tenants.

The table below shows the social value generated using HACT's well being values

Outcome	HACT Well Being Value per person £'s	Outputs	Total value generated (minus deadweight) £'s
Access to internet	1,875	96	87,489

PERSONAL IMPACT – Mrs V

I have attended the Magic Memories Course at Martin Ave in Newton Le Willows. I feel that I have 100% increased in confidence as a result of the course. I can surf the internet and now have an email account which I use on a regular basis to contact family. I have also recently booked 2 holidays on single holidays for older people and have saved over £100 on the trips by booking on line. I felt really proud of myself on holiday as some older people are still frightened of going on a computer and in fact they thought I was a 'brainiac' for learning how to use my laptop. I also have a tablet which I use on a regular basis. I am now keen to learn about how to save money on my fuel bills, how to manage my finances on line and order repairs, so that I will become paperless at home.



I have thoroughly enjoyed the process of going through my photos of my recent cruise with my family

as it brought back great memories. The family will be able to have a look at the book at family gatherings and remember the good times we shared.

I wasn't very keen on learning about computers at first as I tried a couple of years ago and didn't enjoy it but I felt that Kathy was really patient and a pleasure to work with.

I am looking forward to the next class in September.

RETURN ON INVESTMENT

At a cost of £32 per person the return on investment in terms of outcomes for our older tenants is very high. This intervention for older people has proved effective and efficient in bringing about important changes in their lives and causing multiple effects. The impact of reducing isolation for older people is very high on a personal level and will improve quality of life.

SOCIAL VALUE SUMMARY

Investment	£3,100
Outputs	96 Older people on line
Cost per output	£32
HACT Well Being Value	£87,489

HEALTH AND WELLBEING

As part of our social responsibility Helena invests in improving the health of its tenants and communities. We have a track record of working with partners in the locality to facilitate events and deliver projects ourselves.

INVESTMENT CASE

St Helens has many areas of multiple deprivation and many of its citizens suffer from poor health and health related conditions. Those in bad health are double the national figures. Premature mortality rates are 15% higher than the nation.

PROJECT: FINGERPOST HEALTH ASSET CONSULTATION

CONTEXT

Fingerpost is an area that suffers from multiple-deprivation with nearly three times the national average reliance on working age benefits.

Within Fingerpost health is a major issue. The premature mortality rate is nearly double that of the nation. Disability and permanent sickness rates are nearly three times the national rate and those in poor health are double the figure for the nation.

PROJECT AIM

To identify and map local health assets against the 5 steps of mental well being:

- 1.Connect -Connect with others, invest time in developing relationships
- 2.Be active- Take part in some level of physical activity
- 3.Keep Learning- Learning new skills builds confidence and creates a sense of achievement
- 4.Give to others-being considerate of others helps gain perspective and builds strong morals
- 5.Take notice- being mindful and aware of surroundings can positively influence how challenges are approached

PROJECT DESCRIPTION

In partnership with the public health team Helena facilitated public meetings to initiate a health asset consultation.

The first stage was consultation with local people with the aim to map the health assets in the local area. This was completed with school children, young people, community groups, church volunteers elderly people sheltered schemes.

OUTPUTS

A total of 110 people were consulted ranging from school children in year 5, teenagers/young people, community groups, volunteers from the local church and older people in sheltered accommodation.

OUTCOMES

Results from the focus groups were categorised into the 5 steps of mental well being. This enabled us to see which assets could be used to support the 5 steps. Results clearly show the main health assets are a real sense of community spirit and the fact that they like living in Fingerpost.

The next step is to work with the community to see how statutory, community & third sector groups can work together to build on these community health assets.

The table below shows the social value generated using HACT's well being values

Outcome	HACT Well Being Value per person £'s	Outputs	Total value generated (minus deadweight) £'s
Volunteering	3,288	2	2,664

RETURN ON INVESTMENT

Following the consultation and identification of community health assets the return so far has included:

2 additional volunteers were recruited to run 'Play Streets' events.

1 'Play Street' event was organised where 56 local families attended. (social return for volunteers is approx. £900 – totals £1800)

The development of an IT Suite at Holy Trinity Church following successful funding applications totalling £8075

The health asset research was used to support a Heritage Lottery Funding application which levered in £239,000 into the area.

Additional 'Make It Happen' sports sessions were commissioned at Nanny Goat Park with a value of £1050.

6 local residents completed a 4 week cookery course

SOCIAL VALUE SUMMARY

Outputs	110 people consulted 2 local volunteers 56 attending play streets event
Funding	£239,000 Heritage Lottery Funding
HACT Well Being Value	£2,828

PROJECT: STAYING HOME

CONTEXT

St Helens has aging population – nearly 40% of the population are over 50 years old and 13% of householders are aged 65 and live on their own increasing their potential vulnerability.

St Helens aging population suffer from a higher level of sickness than other regions. The premature mortality rate in St Helens is 15% higher than the national figure and there are over 6,000 people over 65 who claim attendance allowance.

Towards the end of their lives only 23% are able to access care to enable them to die at home.

PROJECT AIM

To support and help tenants and residents to stay in their homes, to have a greater quality of life and to avoid the costs of hospitalisation.

PROJECT DESCRIPTION

The project offers support to older people aged over 85 in Helena's general needs stock and older tenants in designated housing via a team of paid officers and volunteers.

The support includes working with residents on

- Building and gaining access to support networks
- Helping to develop life skills
- Identifying health needs
- Making sure residents feeling safe
- Identifying cognitive dysfunction and accessing support
- Supporting residents with mental health issues
- Maximising income for residents

Referrals are made from Helena staff and sought from the following external agencies:

Voluntary sector

Parkinson's Disease Society
Pilkington's Welfare
Senior Voice Forum
Dementia Links

Health & Social Care

Integrated Access Team
Adult Assessment Team
Integrated Community Nursing Team
VCA, RVS, CLC.

INVESTMENT

£100,000 of external funding from the Local Authority and Clinical Commissioning Group.

OUTPUTS

Older people contacted	195
Non-Helena Tenants assessed	16
Helena Tenants assessed	126
Were not assessed due to lack of response	23
Refused assessment	30
People receiving help from a volunteer	19

OUTCOMES

Outcomes from the support include:

Enabling tenants to afford to stay warm
Maximising the amount of benefits people receive
Support from a volunteer
Referrals to occupational therapy for physical support
Referrals to home improvement agency, for improvements/adaptations to the fabric of their home.

CASE STUDY

Mr V

Mr V is an older person who is fairly vulnerable physically and therefore at risk of a fall in his home. Mr V does not a great deal of money and his furniture was very old. This meant that the arms of the chairs he used had become very shiny with use. They became slippery. This added to the risk of Mr V slipping and falling as he either sat down or got out of his chair. To minimise the risk of a fall the Staying Home Team bought new furniture for Mr V from a

second hand store. The new furniture is covered in unworn fabric providing Mr V with an effective grip: A simple intervention that reduces the potential of a fall and removed the risk of a fall caused by the 'slippery' arms on his old furniture.

RETURN ON INVESTMENT

The return on investment is best expressed in terms of social return and the unique service that the project can provide. As they are not a statutory service the Staying Home Team can act as the 'glue between services'. They can provide small interventions very quickly that help prevent older and vulnerable people from harm and avoiding the expense of going to hospital.

It is not possible at the moment to measure any costs saved from stopping people going to hospital. This may be possible in the future if we can measure the average admittance rate against the client group admittance rate.