

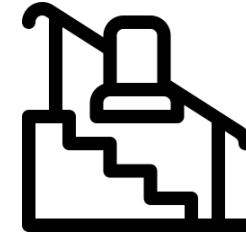
The background of the image is a photograph of a modern building with a sign that reads "ALLIANCE norse". The building has a grey facade with large windows and a sign that matches the logo. The sky is blue with some clouds. The logo itself is in the top right corner, with "ALLIANCE" in green and "norse" in dark blue.

ALLIANCE norse

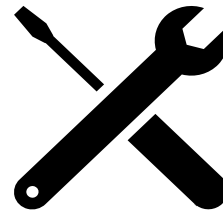
A partnership between
Staffordshire Moorlands District
Council,
High Peak Borough Council
and Norse Group

Alliance Norse provides the following services in partnership with High Peak Borough Council and Staffordshire Moorlands District Council:

- Cleaning and Caretaking
- Planned and Responsive building maintenance
- Management and delivery of capital projects
- Compliance management, technical and project staff
- Disabled adaptations (N-Able)



**Employing 98
staff in the local
area**



THE TEAM

Tony Taylor
Operations Director



Peter Chadwick
Head of Capital
Projects

Richard Howard
Head of Repairs

Kim Taylor
Operations Support
Manager

Jade Seddon
Compliance
Officer

Tracey Whittle
Area Operations
Manager

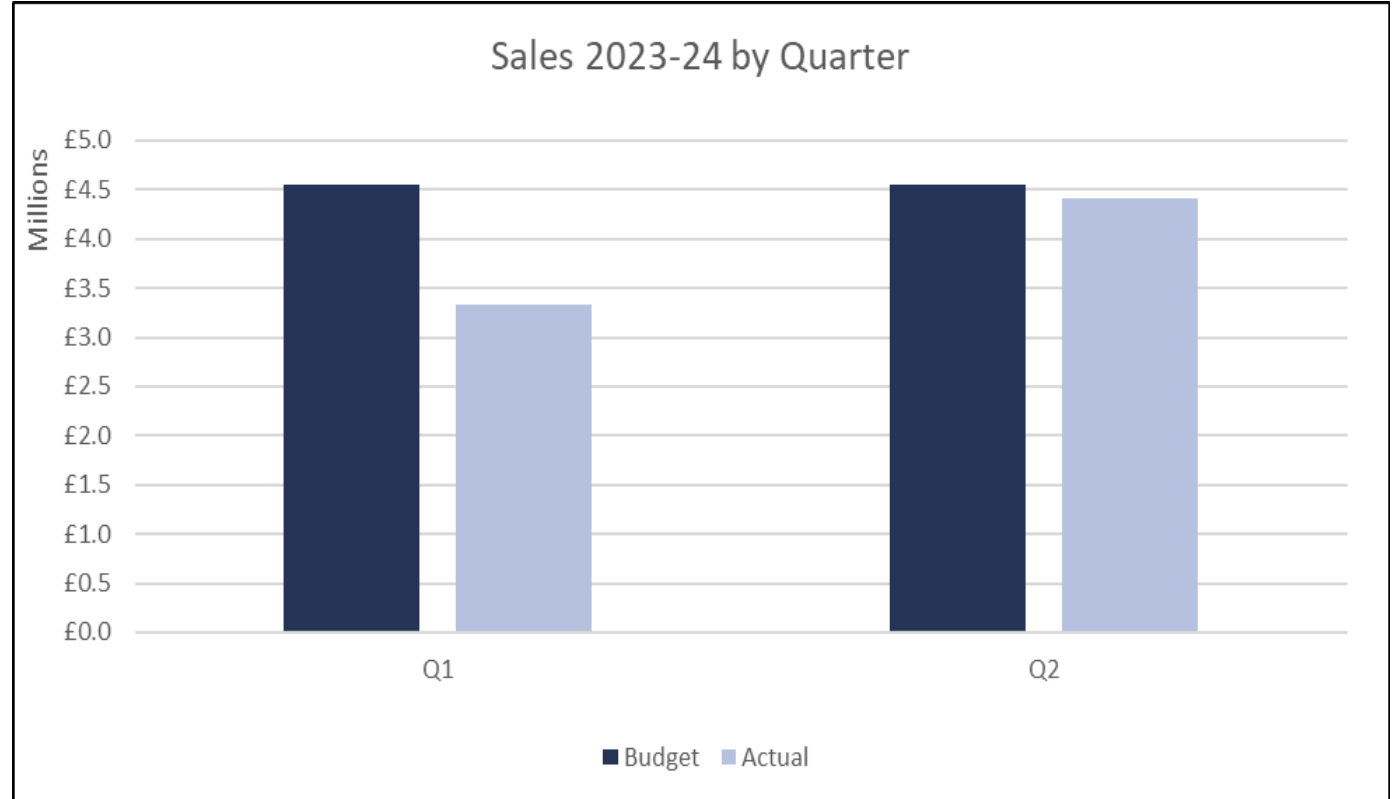
Lucy Brookes
Senior
Occupational
Therapist



Q2 ended with revenue slightly behind budget by £131k at £4.4m.

Increased Capital delivery through this quarter, predominantly within housing which was underspent by £15k at £1.6m. General capital works low in the quarter at £44k overall. Budget information received from the strategic team enabling works to commence. Capital revenue has an adverse variance of £813k, with an actual of £1.7m overall for the quarter.

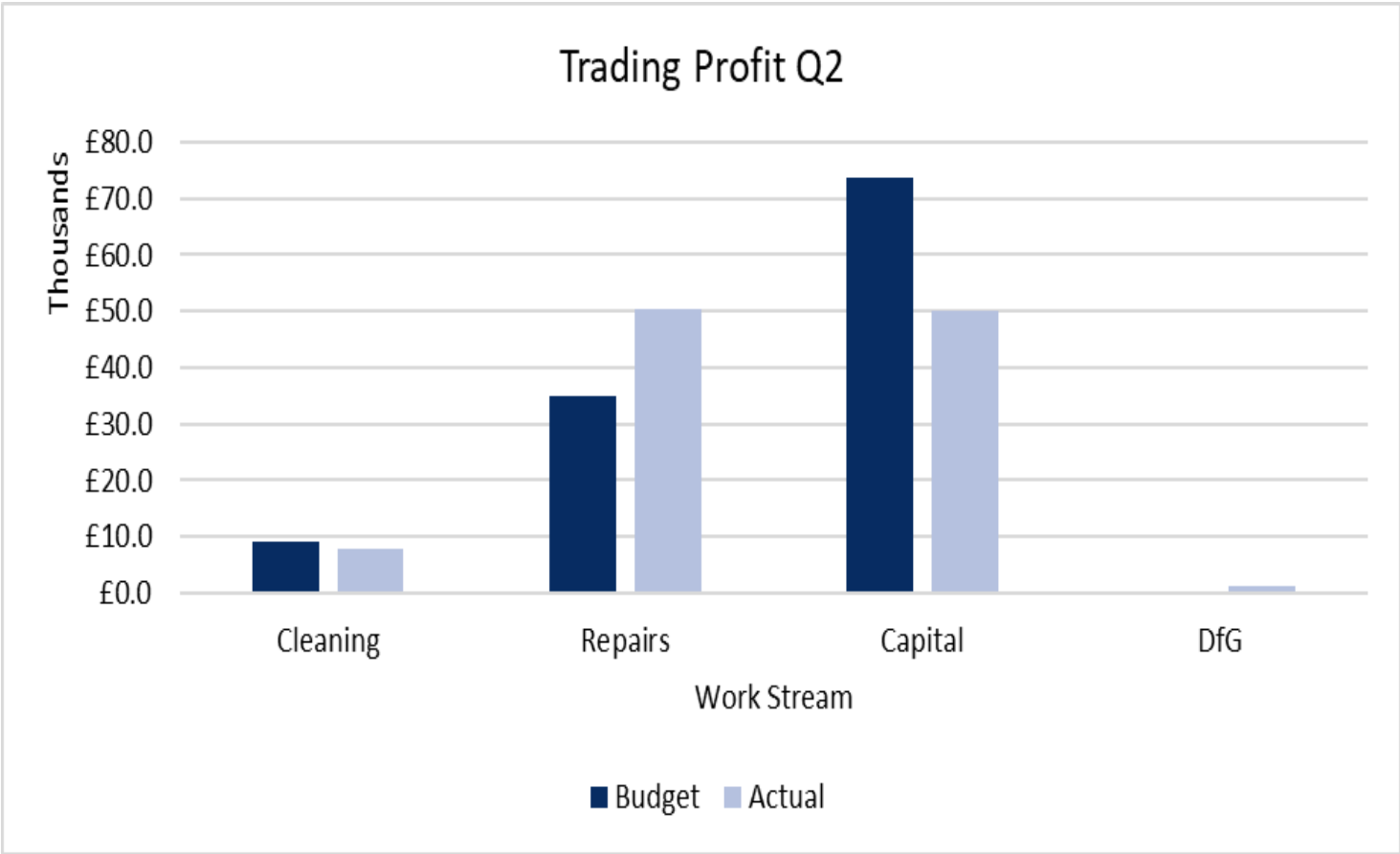
High Responsive demand continued through Q2, with revenue of £1.7m resulting in a £500k overspend. HRA is responsible for 93% of the overspend (£466k) – it is important to recognise that the continuing recruitment drive maintains the reliance on subcontractors. As the Capital programme continues, we would expect the volume of repairs come down as stock is updated.



FINANCE OVERVIEW

Aside from the main drivers within Alliance, Cleaning and Caretaking continues to perform well. Profit for the quarter £1k under budget at £8k.

The Disabled Grant operating successfully via N-Able with delivery revenue of £800k.



ALLIANCE norse

FINANCE OVERVIEW

	2023/24 Actual Q2	2023/24 Budget
Income	£4,416,372	£18,188,058
Materials	-£531,977	-£577,085
Supplies & Services	-£9,887	-£10,107
Labour Costs	-£469,165	-£2,922,709
Sub-contractors	-£2,703,903	-£11,246,287
Transport Costs	-£46,467	-£112,869
Equipment Costs	-£3,576	-£137,349
Other Costs	-£3,555	-£23,100
Total Direct Costs	-£3,768,530	-£15,029,506
Salary Costs	-£295,398	-£1,121,898
Other Overhead Costs	-£63,231	-£352,607
Total Indirect Costs	-£358,629	-£1,474,505
Central Admin Overhead	-£179,845	-£1,143,513
Profit before Payback and Tax	£109,368	£540,534
Payback	-£31,314	-£179,948
Tax	-£12,690	-£90,147
Profit after Payback and Tax	£65,364	£270,439
Total costs	-£4,307,004	-£17,647,524

4. KEY PERFORMANCE INDICATORS

Q2 - CORPORATE REPAIRS

Total number of repairs reported	324	P1 Completed on time	100%	P2 Completed on time	77%
P3 Completed on time	68%	P4 Completed on time	77%	Completed on time - All	74%
Appointments made	249	Appointments kept	N/A	Average cost of a repair	£299
First time fix	96%	Tenant satisfaction surveys completed	N/A	Tenant satisfaction	N/A

Q2 - VOIDS

Number of voids completed	57	Voids completed within target	86%	Cat1 voids completed within target	95%
Cat2 voids completed within target	81%	Cat3 voids completed within target	80%	Tenant satisfaction surveys completed	N/A
Tenant satisfaction	N/A	Average cost of void repair	£4,258	Average turnaround (days)	23

Q2 - HOUSING REPAIRS

Total number of repairs reported	3587	P1 Completed on time	100%	P2 Completed on time	90%
P3 Completed on time	89%	P4 Completed on time	95%	Completed on time - All	93%
Appointments made	4075	Appointments kept	94%	Average cost of a repair	£198
First time fix	94%	Tenant satisfaction surveys completed	213	Tenant satisfaction	91%

We continue to perform well across the majority of KPI's, however, we need to continue to improve and develop the Connect system data input to ensure that information is accurate at first point of entry. Reducing the need for manual data management. We remain 100% gas compliance across Housing and are continuing to develop our relationship with Liberty Gas.

This will enable us to be better informed and remove the need for housing intervention throughout the process. True collaboration with Liberty and Alliance Norse is key to driving better performance, which has been agreed with both parties. Voids are performing very well against Cat 1 & 3, Cat 2 requires targeting to improve performance but is still exceeding the target figure. Regular meetings with housing have been positive, and with the client now having access to the system will keep them better informed on the stage of each void. Cleaning and Caretaking is performing well. Justified complaints are low in comparison to frequency of openings.

DFG Services

N-able is performing well since the opening on 23 May 2023, with a new appointment of Lucy Brookes.

Lucy Brookes was appointed as Senior OT in August; she has settled well into the role and the team is performing well following this appointment. We still have vacancies for OT assistant and a caseworker which are being advertised currently.

We currently have 8 cases that we are awaiting either completed paperwork, landlord approval or OT approval, this amounts to £52,611.87, there will be more, these are awaiting the quotes to come back from contractors, they will be received once OT approval has been granted and asbestos removal has been completed.

The new cases seem to have slowed down a little. HPBC referrals come direct to the shared mailbox and the Staffordshire Moorland cases, go through to Mike Towers who then forwards them over, again, to the shared mailbox.

High Peak Borough Council

Q1 Committed £219,509

Q2 Committed £511,968

Total = £731,477

Actual Spend (HP) £378,723

Staffordshire Moorlands Council

Q1 Committed £220,558

Q2 Committed £571,420

Total = £737,978

Actual Spend (SM)

£446,850

**Total Committed in
Q1&2: £1,469,455.00**

- **273** cases in total
- **127** cases completed.
- **84** of which require land charges to be added
- **3** complaints from Your Housing Group (YHG) all in Staffs Moorlands (all resolved successfully within the Norse Complaints policy)
- The senior DFG engineer is carrying out post inspections of works and customer satisfaction surveys on behalf of N-Able (resulting in the 3 complaints above being recorded)
- 1st Audit is Scheduled for November 2023
- Compliments received **14** in total, spread Between N-Able and Contractors.

KPI'S - Appendices

Compliance - Legislation



Legislation

Work Area	Council	KPI Type	What is the contractual KPI Measuring?	KPI Description	Reporting Frequency	Owner	2022-23	Q1	Q2	October & Q3	YTD	Target	Tolerance	Reporting Location	Comments	
Gas & Heating																
L001H	HPBC	Corporate	Process	Statutory Compliance	Properties with current gas safe certificate	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Commissioning Board		
L001C	Alliance	Corporate	Process	Statutory Compliance	Properties with current gas safe certificate	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Commissioning Board		
L002H	HPBC	Management	Process	Service - Delivery	Response time to no heating call out	Monthly	Jade Seddon	100%	100%	100%	100%	24hrs	24hrs	Operations meetings	As managed through Liberty Contract.	
L002C	Alliance	Management	Process	Service - Delivery	Response time to no heating call out	Monthly	Jade Seddon	100%	100%	100%	100%	24hrs	24hrs	Operations meetings		
Asbestos																
L003H	HPBC	Management	Process	Statutory Compliance	Asbestos Mgt Plan in place (communal)	Quarterly	Jade Seddon	0.00%	100%	100%	100%	100%	100%	Operations meetings	(Sheltered) Asbestos Management Surveys in date, annual reinspections completed	
L003C	Alliance	Management	Process	Statutory Compliance	Asbestos Mgt Plan in place	Quarterly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L004H	HPBC	Corporate	Process	Statutory Compliance	Completed asbestos Management checks	Quarterly	Jade Seddon	0.00%	100%	100%	100%	100%	100%	Commissioning Board	(Sheltered) Asbestos Management Surveys in date, annual reinspections completed	
L004C	Alliance	Corporate	Process	Statutory Compliance	Completed asbestos Management checks	Quarterly	Jade Seddon	100%	100%	100%	100%	100%	100%	Commissioning Board		
L005H	HPBC	Corporate	Process	H&S	RIDDOR reportable incidents	Quarterly	Jade Seddon	0	0	0	0	0	0	Commissioning Board		
L005C	Alliance	Corporate	Process	H&S	RIDDOR reportable incidents	Quarterly	Jade Seddon	0	0	0	0	0	0	Commissioning Board		
L006H	HPBC - Housing	Management	Process	Service - Efficiency	Digitised Asbestos register records	Annually	Jade Seddon	0.00%	0.00%	0.00%	0.00%	0.00%	Baseline	Operations meetings	Part of improvement plan. Targets to be agreed.	
L006C	Alliance	Management	Process	Service - Efficiency	Digitised Asbestos register records	Annually	Jade Seddon	100%	100%	100%	100%	100%	Baseline	Operations meetings		
Fire																
L007H	HPBC	Management	Process	Statutory Compliance	Current FRA on record	Quarterly	Jade Seddon	0%	0%	100%	100%	100%	100%	95%	Commissioning Board	Sheltered FRA's were carried out in June 2023
L007C	Alliance	Management	Process	Statutory Compliance	Current FRA on record	Quarterly	Jade Seddon	100%	100%	100%	100%	100%	100%	95%	Commissioning Board	
L008H	HPBC	Management	Process	Statutory Compliance	Emergency light drop test checks	Annually	Jade Seddon	0%	100%	100%	100%	100%	100%	Operations meetings	100% - not recorded on MPS (yet!)	
L008C	Alliance	Management	Process	Statutory Compliance	Emergency light drop test checks	Annually	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L009H	HPBC	Management	Process	Statutory Compliance	Fire detection & alarm inspections	Quarterly	Jade Seddon	0%	100%	100%	100%	100%	100%	Operations meetings	100% - not recorded on MPS (yet!)	
L009C	Alliance	Management	Process	Statutory Compliance	Fire detection & alarm inspections	Quarterly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L010H	HPBC	Management	Process	Statutory Compliance	Annual smoke alarm check	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L011H	HPBC	Management	Process	Statutory Compliance	Periodic fire door certification	Annually	Jade Seddon	0%	0%	0%	0%	0%	100%	90%	Operations meetings	In progress
Electrical																
L013H	HPBC	Management	Process	Statutory Compliance	Properties with valid fixed wire certificate	Monthly	Jade Seddon	94.05%	96.78%	97.38%	96.22%	96.22%	100%	95%	Operations meetings	Contractor is now starting on site - mid May
L013C	Alliance	Management	Process	Statutory Compliance	Properties with valid fixed wire certificate	Monthly	Jade Seddon	99.00%	100%	100%	100%	100%	100%	97.50%	Operations meetings	Contractor is now starting on site - mid May
L014H	HPBC	Management	Process	Statutory Compliance	Valid Portable Appliance Tests (PAT)	6 Monthly	Jade Seddon	0.00%	100%	100%	100%	100%	100%	95%	Operations meetings	Paperwork obtained, tests carried out August 2022
L014C	Alliance	Management	Process	Statutory Compliance	Valid Portable Appliance Tests (PAT)	6 Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	97.50%	Operations meetings	
L015H	HPBC	Management	Process	Service - Delivery	C1 remedials rectified at test	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L015C	Alliance	Management	Process	Service - Delivery	C1 remedials rectified at test	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L016H	HPBC	Management	Process	Service - Delivery	C2 remedials rectified within 5 days	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	97.50%	Operations meetings	
L016C	Alliance	Management	Process	Service - Delivery	C2 remedials rectified within 5 days	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
Water Hygiene																
L017H	HPBC	Management	Process	Statutory Compliance	Properties with valid L8 compliant WRA	6 Monthly	Jade Seddon	0%	100%	100%	100%	100%	100%	97.50%	Operations meetings	100% - not recorded on MPS (yet!)
L017C	Alliance	Management	Process	Statutory Compliance	Properties with valid L8 compliant WRA	6 Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L018H	HPBC	Management	Process	Statutory Compliance	Monthly WRA tests completed	Monthly	Jade Seddon	0%	100%	100%	100%	100%	100%	97.50%	Operations meetings	100% - not recorded on MPS, carried out monthly by Houseman Environmental
L018C	Alliance	Management	Process	Statutory Compliance	Monthly WRA tests completed	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	97.50%	Operations meetings	
Lifts																
L019H	HPBC	Management	Process	Statutory Compliance	Lifts serviced and with have current RA	Monthly	Jade Seddon	100%	100%	77.78%	78.00%	78.00%	100%	100%	Operations meetings	
L019C	Alliance	Management	Process	Statutory Compliance	Lifts serviced and with have current RA	Monthly	Jade Seddon	100%	100%	100%	100%	100%	100%	Operations meetings		
L021H	HPBC	Management	Process	Statutory Compliance	Stair lifts serviced	Monthly	Jade Seddon	97%	58.82%	32.77%	61.00%	61.00%	100%	100%	Operations meetings	104 lifts in properties only 63 have a current LOLER

KPI'S - Appendices

Responsive Repairs



Responsive Repairs

Work Area	Council	KPI Type	What is the contractual KPI Measuring?		KPI Description	Reporting Frequency	Owner	2022-23	Q1	Q2	October & Q3	YTD	Target	Tolerance	Reporting Location	Comments
Delivery																
R001H	HPBC	Management	Process	Service - Delivery	Total number of repairs reported - Housing	Monthly	Richard Howard	11467	3423	3587	1435	8445	-2.5%pa	-	Commissioning Board	8% reduction in orders comparing Q1 to Q2
R001C	Alliance	Management	Process	Service - Delivery	Total number of repairs reported - Corporate	Monthly	Richard Howard	1014	328	324	137	789	-	-2.5%pa	Commissioning Board	
R002H	HPBC	Corporate	Process	Service - Delivery	P1 repairs completed within 24hrs - Housing	Monthly	Richard Howard	95.00%	99.00%	100.00%	100.00%	99.50%	95%	95%	Commissioning Board	
R002C	Alliance	Management	Process	Service - Delivery	P1 repairs completed within 2hrs - Corporate	Monthly	Richard Howard	100.00%	100.00%	100.00%	100.00%	100.00%	95%	95%	Commissioning Board	No jobs in September
R003H	HPBC	Corporate	Process	Service - Delivery	P2 repairs completed within 5 days - Housing	Monthly	Richard Howard	91.00%	90.00%	90.00%	96.00%	91.00%	85%	85%	Commissioning Board	8 failures in October
R003C	Alliance	Management	Process	Service - Delivery	P2 repairs completed within 24hrs - Corporate	Monthly	Richard Howard	40.00%	62.00%	77.00%	100.00%	70.00%	90%	90%	Commissioning Board	No failures in the month
R004H	HPBC	Corporate	Process	Service - Delivery	P3 repairs completed within 21 days - Housing	Monthly	Richard Howard	90.00%	72.00%	89.00%	95.00%	84.00%	80%	80%	Commissioning Board	20 failures in October
R004C	Alliance	Management	Process	Service - Delivery	P3 repairs completed within 7 days - Corporate	Monthly	Richard Howard	62.00%	63.00%	68.00%	95.00%	71.00%	80%	80%	Commissioning Board	1 failure in the month
R005H	HPBC	Corporate	Process	Service - Delivery	P4 repairs completed within 16 weeks - Housing	Monthly	Richard Howard	98.00%	94.00%	95.00%	97.00%	94.00%	75%	75%	Commissioning Board	11 failures in October
R005C	Alliance	Management	Process	Service - Delivery	P4 repairs completed within 28 days - Corporate	Monthly	Richard Howard	81.00%	76.00%	77.00%	96.00%	77.00%	70%	70%	Commissioning Board	1 failure in the month
R006H	HPBC	Corporate	Effectiveness	Service - Efficiency	Appointments made and kept - Housing	Monthly	Richard Howard	91.00%	93.00%	94.00%	95.00%	94.00%	80%	75%	Commissioning Board	
R007H	HPBC	Corporate	Effectiveness	Service - Efficiency	Number of "first time fix" repairs	Monthly	Richard Howard	94.00%	95.00%	94.00%	94.00%	94.00%	75%	70%	Commissioning Board	
R007C	Alliance	Management	Effectiveness	Service - Efficiency	Number of "first time fix" repairs	Monthly	Richard Howard	95.00%	99.00%	96.00%	94.00%	97.00%	70%	70%	Commissioning Board	
R008H	HPBC	Corporate	Effectiveness	Service - Efficiency	Repairs completed on time	Monthly	Richard Howard	93.00%	88.00%	93.00%	96.00%	91.00%	80%	75%	Commissioning Board	
R008C	Alliance	Management	Effectiveness	Service - Efficiency	Repairs completed on time	Monthly	Richard Howard	65.00%	70.00%	74.00%	96.00%	74.00%	70%	70%	Commissioning Board	
Finance																
R009H	HPBC	Corporate	Cost	Financial - VFM	Average cost of repairs order	Monthly	Richard Howard	£287.00	£280.00	£198.00	£161.00	£223.00	Baseline	-	Commissioning Board	
R010H	HPBC	Corporate	Cost	Financial - VFM	Repairs cost per property	Annually	Richard Howard	-	-	-	-	-	Baseline	-	Commissioning Board	
Customer Satisfaction																
R011H	HPBC	Corporate	Effectiveness	Service - Quality	Number of justified complaints	Monthly	Richard Howard	20	13	5	0	18	15	20	Commissioning Board	Lot mor more compliants this year compared to last year
R012H	HPBC	Corporate	Effectiveness	Service - Quality	Number of unjustified complaints	Monthly	Richard Howard	17	9	12	3	24	15	20	Commissioning Board	
R013H	HPBC	Corporate	Effectiveness	Service - Quality	Tenants satisfied with repairs service	Monthly	Richard Howard	91.00%	93.00%	91.00%	94.00%	92.00%	95%	90%	Commissioning Board	
R014C	HPBC	Corporate	Effectiveness	Service - Quality	Number &/ % of a) Assisted Contacts (Phone) B) Web?	Monthly	Richard Howard	-	-	-	-	-	Baseline		Operations meetings	Initially contacts will be taken by phone. Revised targets can be set one IT systems have been installed and configured.
R015C	SMDC	Corporate	Effectiveness	Service - Quality	Number &/ % of a) Assisted Contacts (Phone) B) Web?	Monthly	Richard Howard	-	-	-	-	-	Baseline	Operations meetings		

KPI'S - Appendices

Voids



Voids

Work Area	Council	KPI Type	What is the contractual KPI Measuring?	KPI Description	Reporting Frequency	Owner	2022-23	Q1	Q2	October & Q3	YTD	Target	Tolerance	Reporting Location	Comments	
Delivery																
V001H	HPBC	Corporate	Process	Service - Efficiency	Voids completed within target	Monthly	Richard Howard	85.00%	95.00%	86.00%	100.00%	93.00%	80%	80%	Commissioning Board	Turnaround time ytd = 22 days. 130 voids completed
V002H	HPBC	Corporate	Process	Service - Efficiency	Cat1 voids completed within 5 days	Monthly	Richard Howard	81.00%	95.00%	95.00%	100.00%	98.00%	80%	80%	Operations meetings	For discussion as part of re-classifying voids
V003H	HPBC	Corporate	Process	Service - Efficiency	Cat2 voids completed within 30 days	Monthly	Richard Howard	99.00%	94.00%	81.00%	100.00%	91.00%	75%	75%	Operations meetings	
V004H	HPBC	Corporate	Process	Service - Efficiency	Cat3 voids completed within 120 days	Monthly	Richard Howard	88.00%	94.00%	80.00%	100.00%	89.00%	70%	70%	Operations meetings	
Customer Satisfaction																
V005H	HPBC	Corporate	Effectiveness	Service - Quality	Tenants satisfied with standard of void	Monthly	Richard Howard	-	-	-	-	Baseline	-	Commissioning Board	Process to be agreed with Housing Team	

KPI'S - Appendices

Cleaning & Caretaking



Cleaning & Caretaking

Work Area	Council	KPI Type	What is the contractual KPI Measuring?		KPI Description	Reporting Frequency	Owner	2022-23	Q1	Q2	October & Q3	YTD	Target	Tolerance	Reporting Location	Comments
Customer Satisfaction																
C001C	Alliance	Management	Effectiveness	Service - Quality	Number of justified complaints	Quarterly	Tracey Whittle	6	0	1	0	1	0	5	Commissioning Board	Definition of "justified" to be agreed.
C002C	Alliance	Management	Process	Service - Delivery	Number of unjustified complaints	Quarterly	Tracey Whittle	12	10	4	3	17	15	20	Commissioning Board	
C003C	Alliance	Management	Effectiveness	Service - Quality	Public satisfied with cleanliness	Annually	Tracey Whittle	-	-	-	-	-	-	Baseline	Operations meetings	
Delivery																
C004C	Alliance	Management	Process	Service - Delivery	Public toilets opened on time	Monthly	Tracey Whittle	98.89%	97.33%	100.00%	99.32%	98.88%	100%	98%	Operations meetings	One site closed due to repairs issue
Quality																
C005C	Alliance	Management	Process	Service - Quality	Quality audits to meet standards	Monthly	Tracey Whittle	93.92%	96.63%	95.10%	93.00%	95.46%	80%	75%	Operations meetings	

KPI'S - Appendices

Capital Programme



Property Improvement & Capital Programme

Work Area	Council	KPI Type	What is the contractual KPI Measuring?	KPI Description	Reporting Frequency	Owner	2022-23	Q1	Q2	October & Q3	YTD	Target	Tolerance	Reporting Location	Comments
Delivery															
P001H	HPBC	Corporate	Process	Service - Delivery	Delivery of Capital Programme	Quarterly	Peter Chadwick	-	-	-	-	90%	80%	Operations meetings	Programme to be agreed at the start of each year
P001C	Alliance	Corporate	Process	Service - Delivery	Delivery of Capital Programme	Quarterly	Peter Chadwick	-	-	-	-	90%	80%	Operations meetings	
P002H	HPBC	Corporate	Effectiveness	Service - Delivery	Properties that meet the DH standard	Quarterly	Peter Chadwick	-	-	-	-	Baseline	-	Commissioning Board	These figures will be informed by Norse updates on Capital Programme but determined by the Council and used to inform strategy and investment decision making.
P003H	HPBC	Corporate	Effectiveness	Service - Delivery	Average SAP rating for housing stock	Annually	Peter Chadwick	-	-	-	-	Band C	-	Commissioning Board	
P004H	HPBC	Corporate	Effectiveness	Service - Delivery	Average EPC score	Annually	Peter Chadwick	-	-	-	-	70+	68	Commissioning Board	
P004C	Alliance	Management	Effectiveness	Service - Delivery	Minimum DEC rating	Annually	Peter Chadwick	-	-	-	-	-	Baseline	Commissioning Board	