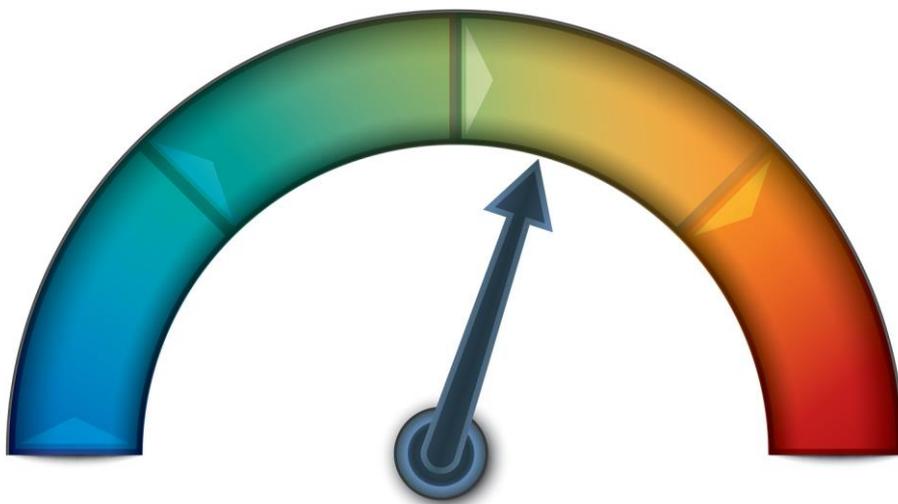


---

# Housing Association

## How to improve the management of performance, value for money and governance

A QOREX case study



**The Situation: A housing association with a turnover of £22m, operating costs of £16m and a capital budget of £1m operating in a regulatory framework was required to manage and report on its complex and often interrelated set of performance indicators, business targets and outcomes.**

The association was required to monitor, manage and report on the achievement of strategic goals and objectives, financial performance, strategic and operational activities, service delivery achievement, outcome targets, individual staff targets and objectives, and the performance of its Value for Money cost-saving programme.

**The Challenge: The housing association found it virtually impossible to effectively exploit the complex mix of indicators, targets and outcomes to make good business decisions.**

Monitoring and managing the performance of a complex and often interrelated set of performance indicators, business targets and outcomes across the housing association was difficult. The key challenges the association encountered when attempting to undertake effective performance management included.

With so many performance indicators, targets and outcomes to manage, the housing association struggled to Identify, structure and prioritise these effectively.

The performance data was hard to maintain and integrate because it was held in multiple system silos.

Analysing the business impact of poor performance across a range of complex and interrelated business indicators was infeasible.

Allocating and managing accountability and responsibility for performance management was problematic.

Communicating and publishing up-to-date performance information in a controlled manner was labour-intensive and time-consuming.

Producing relevant and up-to-date performance reports and distributing them automatically was not possible with existing systems.

Prioritising initiatives to understand the greatest areas of return on investment was a slow and Often inaccurate process.

Collaborating effectively with stakeholders such as managing agents, local authorities and regulators on the achievement of priority and critical business performance indicators was problematic.

Integrating the achievement of business performance with programme and project management, such as the Value for Money programme was complicated and time-consuming.

Areas of duplication, inefficiency, poor performance and poor return on investment were hard to identify and make visible.

Cascading performance management mechanisms and methodologies were not in place across the association.



## The QOREX Solution: Significant improvements in the accuracy and timeliness of monitoring and managing complex and interrelated performance indicators, business targets and outcomes to facilitate fast reporting and effective decision-making.

The Performance Management module addressed these challenges through:

- Providing a comprehensive **business planning tool** that ensured the integrity, efficiency and effectiveness of the association’s business strategy and the business indicators that measure performance against that strategy.
- Providing a **single source of performance measures** and progress against them.
- Ensuring a **consistent and structured approach** to performance monitoring and management across the association.
- Providing **integrity reports that identified duplication, inefficiency and redundancy** across the association which enabled the association to be optimised and focused on where it adds most value.
- Enabling **performance measures to be linked to association delivery initiatives**, departments and individuals and other organisations where appropriate (such as stakeholders and suppliers).
- **Automating** the production and distribution of **performance reports**.
- **Associating every performance measure** and associated delivery initiative **to individuals** from accountability, responsibility, support and administration perspectives.
- Ensuring that **every performance measure has an associated delivery plan**.
- Enabling appropriate and timely **communication and collaboration**.

ID	Indicator	Target Date	Target Value	Value on Report Date	Value on Target Date	Forecast on Target Date	Cost	Forecast Return
<b>Financial Target (1)</b>								
11	Trading reserves	31/12/13	£789,725	£980,431	£980,431	£789,725	£0	£789,725
			<b>£789,725</b>	<b>£980,431</b>	<b>£980,431</b>	<b>£789,725</b>	<b>£0</b>	<b>£789,725</b>
<b>Financial Limit (2)</b>								
11	Current forecast out-turn	31/12/13	£40,000	£56,996	£56,996	£0	£0	£0
12	Capital spend	31/12/13	£6,365,000	£5,040,106	£6,040,106	£6,365,000	£0	£0
			<b>£6,405,000</b>	<b>£6,097,102</b>	<b>£6,097,102</b>	<b>£6,365,000</b>	<b>£0</b>	<b>£6,365,000</b>
<b>Numeric Target (1)</b>								
15	Gas safety certificates	31/12/13	100.00	100.00	100.00	100.00	£0	£0
<b>Numeric Limit (3)</b>								
14	Complaints	31/12/13	10.00	18.20	18.20	0.00	£0	£0
112	Average re-let time	31/12/13	16.00	24.07	24.07	19.00	£0	£0
117	Staff sickness	31/03/14	7.99	5.86	7.29	8.17	£0	£0
<b>Percentage Target (8)</b>								
16	Repairs - tenant satisfaction	31/12/13	97.00%	98.06%	98.06%	97.00%	£0	£0
17	Repairs - emergency	31/12/13	100.00%	100.00%	100.00%	100.00%	£0	£0
18	Repairs - urgent	31/12/13	99.00%	97.97%	97.97%	100.00%	£0	£0
19	Repairs - routine	31/12/13	97.00%	98.18%	98.18%	97.00%	£0	£0
110	ASB complaints - serious	31/12/13	100.00%	100.00%	100.00%	100.00%	£0	£0
111	ASB complaints - less serious	31/12/13	100.00%	100.21%	100.21%	100.00%	£0	£0
114	Tenant satisfaction - property	31/12/13	98.00%	100.00%	100.00%	100.00%	£0	£0
115	Tenant satisfaction - letting process	31/12/13	98.00%	100.00%	100.00%	100.00%	£0	£0
<b>Percentage Limit (2)</b>								
113	Rent lost through vacancy	31/12/13	0.70%	1.30%	1.30%	0.90%	£0	£0
116	Rent arrears	31/12/13	1.31%	1.42%	1.42%	1.53%	£0	£0

We have demonstrated to this housing association how their business strategy and performance against that strategy can be structured and managed through the QOREX and its associated methodology.

### What our clients say:

*“Beautiful in its simplicity and the clarity that it creates”*  
Transport for London

### Contact us:

QOREX is designed in the knowledge of the financial and resource constraints that our clients face and, so is focused on speedy deployment, minimising the time investment from our clients and maximising an early return on their investment. The combination of our methodology and structured approach with our leading-edge web-based software provides a compelling solution for our clients.

Contact Phil Trickey on 01372 365734, mobile 07834 800416, email [phil.trickey@gorex.co.uk](mailto:phil.trickey@gorex.co.uk) or visit our website [www.gorex.co.uk](http://www.gorex.co.uk).