

Business Plan



2021-22



Our Vision

“Between now and 2022, we will modernise Bield Housing & Care and celebrate its heritage and standing as a Registered Social Landlord. We will achieve this by listening to our customers, talking to our staff and securing a solid platform from which we can deliver the future services and homes for our growing older population.”



Over this past year the global Covid pandemic has had a significant impact for all areas of society. Bield responded well to the pandemic, however it has had an impact on the pace at which we could deliver our plans and ambitions.

However, there is much to be celebrated, valued and learned from our experience during this time; we thrived and excelled as we continued to provide vital services in challenging circumstances.

The Covid experience also accelerated some of our change programmes relating to ways of working, virtual connectivity and digital capability which enabled our staff to work effectively during

lockdown. We identified that we have many wonderful staff who showed that they can be flexible and brave in unexpected circumstances. Our staff are committed to the older people who live in our homes and receive our services.

As an organisation, we have been agile, imaginative and proactive in our response and have been recognised for our strategic approach and ongoing tactical response.

The pandemic highlighted many areas, particularly around processes and systems, that require investment and redesign and are part of our 2021-2022 business plan. These process and system deficits are why we made an amendment to

our existing vision, published in our Business Strategy, and to help us to shape our Business Plan for 2021/22

We believe that this year's Business Plan needs to be responsive and adaptive. We have set out our corporate objectives, and include plans to keep our customers, staff and services safe until the end of the pandemic and beyond. Bield has also included plans for a transition from Covid; recovery, remobilisation and renewal. Developing our people, systems and managing process will be prioritised. Through bridging these pandemic themes with our annual corporate objectives, we will emerge stronger as a fit-for-purpose, valued organisation for our tenants.



Chief Executive's Welcome

This Business Plan builds on what has come before and captures the essence of our learning as we emerge from the Covid pandemic. I could not have imagined that my first full year leading the organisation, would involve managing in a pandemic and shaping and delivering our services in vastly different circumstances. I am immensely proud of our Covid19 response, the staff team, volunteers, our tenant's and owners within our communities. Collectively we have continued to be imaginative, flexible and resilient as we worked together, through uncertain times.

Our Business Strategy for 2018 – 2023 sets out key enablers and priorities which remain central to our ambition. However, the volatile and uncertain environment we find ourselves has driven a revised vision and significantly changed the challenges and opportunities Covid19 learning has offered. This Business Plan provides focus on how we will adjust, amend and manage our way out from the pandemic. Providing the continued opportunity to keep our services focused on our customers and their needs.

The significance behind the name Bield, in the Scottish tongue, means 'to shelter or take shelter'. during the pandemic the Scottish Government asked the population to 'Stay Home and Protect Lives' and there was never a more apt name for the organisation, with 5200 older people living across our properties and largely shielding from the Covid19 virus.

Throughout 2021 we will be celebrating Bield's 50th Birthday. We are indebted to all the previous voluntary Chairs and Board Members alongside, Alister Green, Jim Thomson and Brian Logan, my predecessors, for their stewardship of the organisation over these past 50 years. I hope that my tenure sets the foundations for the next 50 years and provides sustainable conditions for those who follow.

We know that the Scottish Population is ageing. We also know that older people consistently say they want to remain at home as they age. We understand that all Health and Social Care Partnerships have ambitions to support more and frailer older people in their own home, in the community, for as long as possible. Therefore, there has never been such a crucial time for Bield as a landlord of choice to adapt and develop what the older people in Scotland will need into the future.



A full list of our annual objectives can be found on pages 12-13. We are excited to share these with you as they focus on our many experiences and learning from this past year.

This plan also sets out our core values, which provide direction on our expected behaviours and approaches as an organisation; we take these very seriously and these will help us shape how we do things during the year. The actions and values ensure that we all pull together in the same direction to achieve our shared vision which is described.

This plan has been developed by the SMT and next year, when things are simpler, we will include a broader range of staff in its development. We believe that this plan delivers the support, investment, and critical actions necessary for the next 12 months and builds on the objectives set in our corporate workplan.



Additionally, every three to five years we would normally conduct a full strategic review of our services, with the next strategy due by March 2023. We will begin the preparations for our next strategy during this year. We will ensure that we have good quality data that reflects insight into our services, the market and our stakeholders to test that our services are still delivering maximum benefit for our customers, and if not, what services we need to consider and grow, or what we need to re-imagine.

I and the senior management team look forward to the year ahead working with you and celebrating our 50th Birthday.

Lynne

Dr Lynne Douglas, Chief Executive

Mission

To enable older people in Scotland to live a full and independent life that improves the quality of their lives and achieves outcomes that are central to what matters to them. We will do this by ensuring a diverse range of housing, care and other service options tailored to the needs of our client group.

Bield is committed to continuously improving its services for older people, involving an on-going programme of review and improvement. We aim to 'Put our Customers First' by making them the heart of everything we do, along with the belief that we can help them make their own choices and be free to live as independently as possible.

Bield set out in the Business Strategy, 2018 – 2023, our key strategic outcomes for our customers and the enablers needed to achieve these. These remain unchanged and are noted opposite:





A series of detailed annual delivery plans containing operational objectives and initiatives are set out to deliver our strategic outcomes. These are underpinned by targets, timescales and defined staff responsibilities to ensure that the results are delivered.

Although our mission, outcomes and enablers remain current, it is clear, from our experience in the pandemic that to deliver our expected outcomes that we must focus on two of the three enablers this operational year; **people and resources** to deliver all our outcomes for customers. We have added a fourth priority to our ambitions, and a key push will be on developing and implementing our people strategy and upgrading our infrastructure.

This Business Plan sets out the aggregated key targets [page 10] and activities [pages 12-13] to ensure that we deliver the Business Strategy.

Our Values



Caring

We have a passion for supporting each other

- caring about the way we speak to each other
- caring about the way we make each other feel
- caring about the mutual support we provide to each other
- caring about the quality of support to each other and our customers



Honesty

We are open, fair, just and act with integrity

- we will be open with others and transparent about the decisions we make
- we will communicate in an open and respectful way
- we will understand that with honesty, we can learn from mistakes
- we will act with an awareness of what is right and appropriate for our roles and behaviours



Equality and Diversity

We deal with all people equally and celebrate diversity

- we will treat every person as an individual
- we will respect diversity
- we understand that society can be unequal and will look to challenge





Inclusion

We involve our people in what we do because their opinions matter

- we will create an organisation where everyone feels welcome and appreciated
- we will listen to others and respect differences of opinions
- We will deliver a cohesive and joined up service for the benefit of our customers, the organisation and our colleagues.



Kindness

We understand that kind words and actions make our organisation great

- we will develop ways of working which are based on mutual respect, openness and compassion; way beyond being nice to each other and our customers.
- we will practice the balance of being outspoken and speaking truthfully with kindness
- we will develop conversations to be more open and sincere to develop deeper relationships
- we will listen without moving to 'fixing'



Dignity

We treat all people with respect

- we understand that that we all have different life experiences, views and opinions
- we will value customers and colleagues for what they are, what they believe in, and how they live their lives
- we will respect that our customers have a right to choose



Ambition

We want to be the best at what we do, and we want our people to realise their potential

- we will aim to be the best that we can be for ourselves, our colleague and our customers
- we are passionate about improving older people's lives and supporting them to live the life they choose and have control over their decisions
- we are driving ambition and interest to focus on the efficient use of our resources

Our seven values are especially important to us, they guide our approach to each other, our customers and partners. These may not be unique to Bield, but we place these common values at the heart of everything that we do; these values help us to empower each other to be the absolute best that we can be and supply the best service to our customers.

Our Priorities

1

**The older persons
social landlord of
choice in Scotland**

Our customers can live independently in their own home as their needs change

We share the Scottish Government's view that, where possible, care should be provided at home to help maintain the independence and quality of life of service users. Unplanned hospital admissions (though sometimes unavoidable) often lead to complications that compromise the ability of older people to return home to lead a fulfilling life.

Our menu of services will continue to be developed and modernised to help support service users to continue to live independently as their needs change and promote a more proactive preventive approach.

There are plans to review and modernise our meals service and similar plans for our care services. These developments will take place alongside system-wide improvements through various ICT and systems investments, including an estate digitisation programme to improve connectivity for both customers and future services.

2

**Delivering desirable high-quality services,
for older people, at a fair cost**

Our customers feel we offer value

Value for money is a balance between the costs and outcomes of delivering our services. Value for money is perceived as being achieved when costs are relatively low, productivity is high and successful outcomes have been delivered.

We will actively look to find efficiencies and / or performance improvements that provide greater value for money for our customers. Our goal is to increase our customer satisfaction levels across several key areas and capture the social value that our customers place on our services.

We will continue to review and improve our range of services. We will recognise that each customer is unique, and we will seek to improve the quality of their life and improve individual outcomes based on their expressed needs and aspirations.





Ensuring that our Homes are of high quality and reflect customer expectations

The quality of our homes and services meets expectations

We appreciate that our customers can (and should) make their own choices, whether that is between service providers or about the type of service they receive. To remain competitive, we will explore and respond to the changing expectations of customers. We also appreciate that our homes and services must meet the quality expectations of customers and other stakeholders, for example regulators, service commissioners and funders.

We have committed £15.7m in this financial year for the specific purposes of upgrading and maintaining our properties, subject to continuing Covid-19 restrictions. If we cannot deliver these commitments, these monies will be placed on hold to spend in future years when the budget will be increased.

We also have three primary property-related reviews planned: a comprehensive stock survey of our properties, understanding our property needs of future customers and a review of our closed assets to allow us to prioritise future spends for customer needs and demand.



Emerging from Covid-19

Learning and Embedding the Lessons from Covid-19

Our staff, systems, and overall organisational ability for change was tested through the pandemic. We understand more about our organisational strengths and weaknesses and we will use these to review and action three primary themes as a priority: Processes and Systems, and People.

We have completed the first phase of developing a people strategy throughout the past 9 months and will continue to prioritise this next year. The staff across the organisation are our greatest asset, this was proven throughout the crisis. We want to align our staff competencies and capabilities with our priorities and ensure that we have the right people, with the right skills in the right place to fully realise all our ambitions.

The people strategy will aid this in part and offers the opportunity to focus on priorities shared with us from the staff survey. This includes improved communications, health and wellbeing, reward and recognition, recruitment and retention and a view to talent management and developing 'grow you own' initiatives. We also have several major projects planned and ongoing to upgrade our core systems and infrastructure, which will ensure a more flexible, efficient and resilient Bield which is better optimised to continue develop our services in a more efficient and effective way.



Our 2021/22 Targets

To manage performance, the Board and Sub Committees will use the following targets for 2020/21. The Board have agreed to review and compare actual performance against targets throughout the year following the redesign from the Governance Review.

2020/21 targets have been developed by the SMT and Board based on benchmark data, from Scottish Housing Network. We have considered our previous annual performance and have set targets in the upper quartile from other Housing Associations to reflect a series of stretch targets for the business.

Customer Experience

Indicator	Target
Satisfaction of new tenants with their home on moving in	85%
Overall satisfaction with landlord services (biennial)	87%
% of Stage 1 Complaints responded to within target	85%
% of Stage 2 Complaints responded to within target	90%
Anti-Social Behaviour cases responded to within timescale	95%
Number of developments with % uptake of meals	40% 40 - 60% 60+%
	0% 20% 80%
Meals surplus over Meals Turnover	0%*
Bield at Home; contracted care hours delivered	223400 Hours (660hpw)
Bield at Home; Number of individual customers	25
Home and Day Care services achieving Grade 4	100%
Rent collected	100%
Current tenant arrears as a percentage of gross rent	1.4%
Former Tenant Arrears written off	£42,000
Average relet time (days)	40 days
Void loss	5%

*this is a phased target, reflective of meals review change programme.

Property Maintenance and Compliance

Indicator	Target
Average time for emergency repairs (hours)	4 hours
Average time for non-emergency repairs (days)	5.5 Days
Average cost per void	£1000
Right First Time (non-emergency)	92%
Number of stage 3 adaptations completed within 90 days	100%
Average time to complete adaptations (stage 3)	90 days
Number of households awaiting stage 3 adaptations	30%
% properties with valid Gas Safety Certificates	100%
Communal electrical safety inspections (EICR) less than 5 years old	97%
Installation of Interlinked smoke and heat detection	100%
Properties which meet EESSH1 requirements	96%
Properties with current EPC	100%
Properties currently meeting SHQS	97%
Owners - Satisfaction with Factoring Service	76%
BR24 - % of calls answered within 60 seconds	97.5%

Our People

Indicator	Target
RIDDOR accidents (rolling 12 months)	0
Return to work compliance	100%
Attendance Levels	96%
% of absences that are Short-Term	2.5%
% absences that are Long-Term (i.e., greater than 4 weeks)	1.5%
Mental Health & Stress absence (% of total hours lost)	20%
Staff turnover	3.25% pq 13.0% pa
PDP compliance	95%

Our Finances

Indicator	Target
Operating Surplus / Turnover	4.6%
Net Surplus / Turnover	4.9%
Overheads % turnover	22.5%

Our Markets

There are now more than 1m over-65's in Scotland, with this figure predicted to rise by more than 300,000 over the next decade and the demand for senior living housing (already an undersupplied market) expected to rise correspondingly, or at a greater rate.

Already, an estimated 22% of over 75s live in social rented accommodation. Against a background of falling rates of home ownership and, worryingly, fewer than half of Scotland's over-55s expecting their home to be suitable for them in later life, there are strong and clear indicators of growing demand for senior-living housing.

This suggests opportunities for Bield and other Social Housing providers - however it may also mean increased competition from, for example, private operators as the sector offers attractive investment opportunities.

The older population are of course not a homogenous group, and the market requires a broad scope of products and services satisfying diverse requirements. An example where Bield are already active is in the telecare market. According to Deloitte, in the over 75's more than 33% of the population could benefit from telecare, suggesting a potential doubling of the current market (where only 16% have telecare devices). However, this is a sector that is likely

to see major change in the medium term, as digitisation and technology changes the landscape and telecare 'democratises', embracing open-source technology and private provision.

Geographic spread and the profile of stock are also significant considerations for Bield's future strategy, and market changes will drive development and renovation planning.

Future demand is expected to concentrate in the densely-populated areas of Glasgow, Edinburgh and central belt. We also expect a greater demand for on-the-level accommodation and adaptations to existing property (to allow continued independent living, the preference of more than 50% of the senior population).

Other markets where Bield operates will see maturation, fragmentation and diversification, and changes in supply and demand for both products and services. These trends will require to be addressed by the various strategic reviews we will undertake in the coming year.

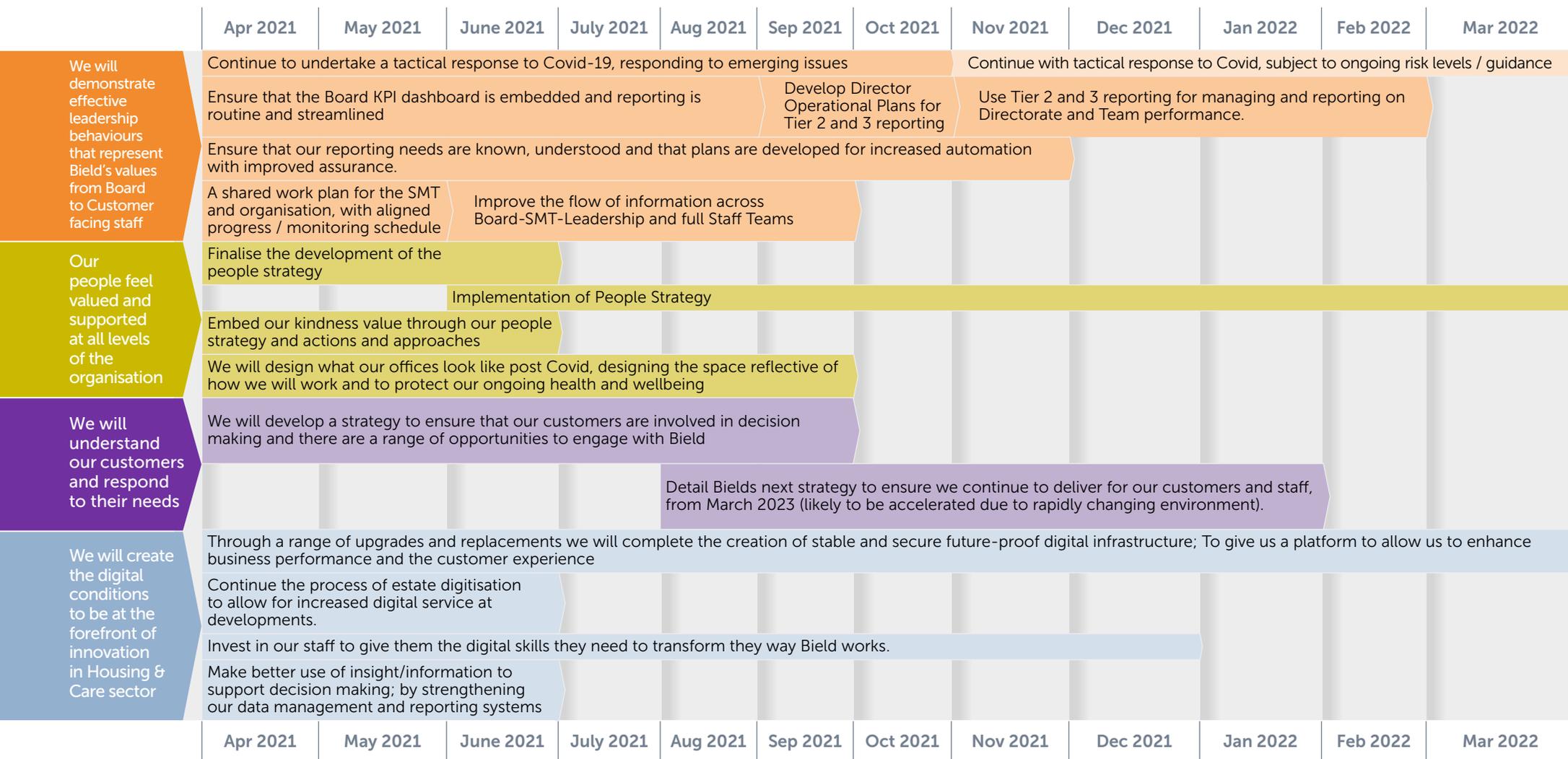


Activities and Milestones

Working effectively – we will work in the most efficient way possible to provide value for money for our customers

Apr 2021	May 2021	June 2021	July 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	
Share the Business Plan across the organisation			Test that the Business Plan is understood and being used for decision making									
Finalise the review of the Meals service	Implement the recommendations, from the independent meals review, and look for savings from recommendations											
Introduce a HR Business Partner model, supporting the people strategy												
Introduce a Finance Business Partner model, supporting the people strategy												
Work with budgets holders to monitor and manage their financial performance using routine management information							Introduce a new budget module to assist with budgeting setting process for 2022/23					
The transition from our current Housing Management system, CTX, to a new housing management system, Cx												
Reduce voids, and void costs, through the identification of efficiencies												
Train and prepare our staff, in new processes, to embrace new ways of working to allow us to work efficiently and effectively												
Publish a communication strategy for the business which will inform how we communicate to both internal and external audiences												
Review the BR24 service and consider how to optimise its commercial performance												
Undertake a strategic asset management review to match with the requirements of our future customer needs												
Review all of our properties and develop a framework tool for future investment												
Invest and install Digital Alarms for 55 sites, reflecting phase 1. Upgrading our properties and preparing to be the first digital alarm receiving service in Scotland												
Conclude review of what future digital alarms will be necessary for the essential analogue to digital transition												
Undertake an appraisal of our stock and use it to prepare a maintenance strategy, and to inform individual building policies												
Commit money to upgrade our properties and keep them in them in a compliant state, meeting all legislative standards												
Review the condition of our stock and update a 10-year strategic investment plan.												
Update our Sustainability Policy												
Implement the Keystone module to help manage our maintenance and overall asset management strategy												
Use our assets to promote health and wellbeing, in our communities												
Take a strategic review of our offices and ongoing costs, for future needs												
Deliver the first stage of the ARC reporting improvement plan		Undertake monthly improvement steps for individual ARC indicators for submission in 2021/22. Assuring process and reporting changes as these are progressed							Undertake external review and assurance of improvements			
			Undertake a review of existing care services, with a view to highlighting areas of risks and improvements				Implement recommendations from care services review					
Apr 2021	May 2021	June 2021	July 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	

Activities and Milestones



Our Future Strategy Development

Our current corporate strategy was defined and agreed in 2017/18, with a planned 5-year lifespan. The natural cycle of strategic planning means that we are now at time to review and reflect on where Bield sits within the sector, how we are creating and delivering value for our customers and staff, and to consider how we will write the next chapter in the Bield story.

The pace of change is ever-increasing. As we have seen in the last year, unforeseen outside events can disrupt even the most robust plans. In turbulent uncertain times, core activities of product and service delivery, financial rigor and growth become strained. Our next strategy will have to be highly focussed on resilience in a challenging environment and a prudent approach to how the future of Bield will be delivered.

Our strategy development for 2023 – 2026 will be a central focus at the Board development session in quarter three of 2021. In preparation, we will conduct a thorough review of our sector, our customers, our properties and our operations. We want to gain a deep understanding of who Bield customers will be, not only now, but in the future. This will help us to design our organisation around them and their needs. Building on this we will outline the direction the business will take over the subsequent 3 years; ensuring that Bield is not only 'fit for purpose' but also sustainable and in a position to continue to deliver for Scotland's older population as one of the sector's leading providers.



Contact Details



If you prefer you can email your enquiry to info@bield.co.uk