



# Providers of Affordable Housing **Annual Report 2007**

*Firm Foundations  
Developing for the Future*





# Mission Statement

*“The Trust seeks to provide an effective, efficient and caring service to its Tenants”*



Homepage of the Trust's new website, launched in March 2007

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## Corporate Objectives

1. To enter the 21st Century as a medium sized Housing Association managed by enthusiastic volunteers contributing to housing need in Dorset.
2. To play a tangible part in the voluntary housing movement, ensuring continuity of suitable management and enhancing our charitable status.
3. To encourage everyone to share in the Trust's success.
4. To ensure that tenants are housed in comfort and in a satisfactory environment, encouraging a sense of community and mutual respect.
5. To maintain a financial balance between income based on affordable rents and the need to meet running costs and future development expenditure.
6. To strive for efficiency without undue bureaucracy maintaining close contact between Management and Tenants.

## Trust registration details

Housing Corporation - L0519  
 National Housing Federation - 533  
 Industrial & Provident Society - 16946R  
 Company Number - 242811

The Trust is a Charitable Industrial & Provident Society and as a member of the National Housing Federation complies with the Federation Code of Governance 2000

Cover photos: Bartley Court Sheltered Elderly Flats, Wimborne  
 Inset - Tenants from East Borough

During the past year the Trust has purchased or developed an additional 20 units of accommodation providing flats for the elderly, those with learning disabilities and younger single people. This has been achieved through the enterprise of the Chief Executive and his staff, which has been supported by our local authority partners and financed in large part, with £792,400 of grant, from the Housing Corporation.

Five years ago the Trust had 174 units, it now owns 242 units and, as Corporate Trustee of Cyril Wood Memorial Trust, manages a further 21 units making a total of 263 units under our management. This is an increase of 89 units, i.e. over 51% growth in five years and represents a remarkable period of expansion for a small housing association. At the end of the financial year the Trust was still a debt free association but the pace of growth will require some mortgaging of properties to enable development to continue at this pace in the future. We have already been promised another £226,000 of grant from the Housing Corporation for a new development in Poole in the coming year.

This year we have also undertaken a property review and decided to sell, subject to Housing Corporation consent, a number of small properties housing general needs tenants. The capital receipts from these will assist our development programme in the coming years and enable us to provide more accommodation for our core activities of housing for sheltered elderly and those with learning disabilities. It is encouraging to see that both central and local government are supporting the energy and initiative of the Trust in providing social housing for those who cannot afford decent homes in such an expensive area as South East Dorset.

During the year our warden service to our sheltered elderly tenants has also been modernised. It was apparent that the level of support across our properties was not of a consistent standard. The move to a *'floating support mobile service'* has enabled us to continue to provide a seven-day a week visit to all sheltered properties whilst improving the quality of service and achieving higher levels of productivity.

The levels of growth in the units of accommodation we provide, together with the improvements in service quality has demonstrated the competence of the Trust staff and the ability of the Board to take the decisions necessary to make things happen quickly, when required. It has been another very successful year in which all involved in East Boro Housing Trust can be justly proud. - **Fr Graham Smith, Chairman**



## Chairman's Report 2007 *Firm Foundations*





## Chief Executive's Report - *Developing for the Future*

**My annual report for the 2006/2007 financial year focuses on developments at the Trust. It truly has been a year for development both internally and externally.** Externally, housing developments have seen the Trust complete four further new build sheltered housing units, purchase properties to provide nine further homes for adults with learning disabilities and one further property to provide accommodation for six young adults in partnership with the Borough of Poole. As a member of the Peninsula Development Partnership, the Trust supported the proposed merger with the Wessex Development Partnership and a new Source Development Partnership was formed. As a result, the Trust is now part of one of the largest development consortia of Housing Associations in the South West. The Source Development Partnership will help the Trust with procurement, planning, development procedures, and access to Social Housing Grants to assist with the funding of future housing schemes.

Internally, the Trust has developed an asset management plan for effective use of Trust stock for the future, increased the size of its Direct Labour Team, modernised the Sheltered Housing Warden Service, expanded the Learning Disability Supported Living Team, and developed a new website. The website is for the benefit of our tenants, partners and those who just wish to find out about the Trust. The website and several other resources were designed as part of a Shell Step placement in 2006. This was East Boro's first time taking part in Shell Step, a nationwide scheme that enables undergraduate students and small-medium sized businesses the opportunity to undertake strategic projects over an eight-week period, a scheme I would recommend to other local businesses.

This truly has been a year for development and with further plans in place, the achievements of this year will help the Trust continue to build on the firm foundations that it has put in place over the past five years.

**Kevin Hodder, Chief Executive**



*Photo from Shell Step Awards, The Marsham Court Hotel, September 2006.*

*Left to right: Kevin Hodder, Chief Executive at East Boro Housing Trust, Emily Cambrook, Bournemouth University Student and Matt Desmier, Operations Manager at Bournemouth's Enterprise Pavilion and Judge of finding Dorset's most Enterprising Student with the Shell Step Placement scheme.*

## Developing

This has been a significant year for the Trust with 19 units developed throughout the year. The Trust completed the construction of four new build sheltered housing units at Christophers in Merley, Poole. This development includes two ground floor units constructed to full mobility standards. Part of the development and further enhancement of this scheme included the construction of a new community room for all the tenants of the 24 units at Christophers to enjoy. A further addition to the Trust's schemes was the purchase of three properties in Poole for adults with learning disabilities. The properties were already occupied when the Trust purchased them. The Trust has enabled the present tenants to stay within their homes and has provided them with security of tenure for the future. The final addition to the Trust stock is a six-bedroom property purchased to enable young adults (16 – 25 year olds) to be accommodated. The Trust will not be providing staff management for this scheme in the future but will select a partner organisation with the Borough of Poole to provide these services. With further schemes in planning the Trust has had a successful year in developing and planning for the future and in fulfilling its aim of providing affordable homes for people that need them.



## Developing and Partnering

## Partnering

**Source Development Partnership** was formed when Peninsula Development Partnership and the Wessex Development Partnership agreed to merge together. This created one of the largest social housing development consortia in the South West and East Boro have played an active part in its formation and subsequent development of this exciting new partnership.

All Source partners are preparing for the 2008/2011 Housing Corporation bid round identifying possible new schemes for the future. The Trust is actively seeking opportunities and will enter partnerships with Local Authorities, other Housing Associations and Developers to enable further schemes to be developed.

The Source website at [www.source-development.co.uk](http://www.source-development.co.uk) provides more details and this is truly the beginning of what can be a successful and exciting development partnership for all of the members within the new Source team.



Members of the Source Partnership



## Maintaining

This year has seen 1,965 response repair jobs with over 98% of the jobs completed within the relevant repair timescales. The Direct Labour Team has been enhanced with the addition of extra skills to ensure that the Trust can undertake more work internally and provide a consistent service at a cost that represents good value for money.

The combination of internally employed labour and professionally retained external contractors covering fire equipment, electrics, gas and specialist servicing provides an effective combination for service delivery to all of our tenants.

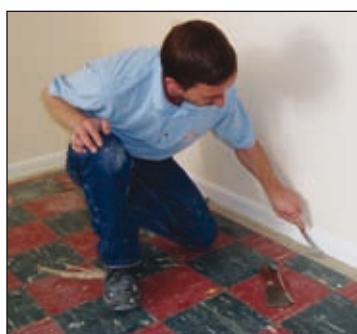
## Maintaining and Investing



External contractor



New porches at Christophers



Member of the East Boro Direct Labour Team



One of East Boro's mobile caretakers

## Investing

The Trust annual planned maintenance programme works towards ensuring the fabric of the Trust stock is maintained in good order and that homes are kept to a decent standard. This year has seen the Trust invest some £103,177 into planned maintenance works and these works have included scheme boiler replacements, double glazed porches, new fascias and guttering, the extension of a studio flat to create a one bedroom unit, modernisation of bathrooms within schemes and renovation of unused area to create an extension of accommodation.



## Support

Two significant changes in the Trust support service have been achieved this year. The first, the modernisation of the Trust Sheltered Housing Warden Services to a "mobile" system that has ensured the Trust can maintain a seven-day a week visiting service to its tenants. This approach has ensured that the level of contact that tenants require has been maintained in an environment where costs of providing the Warden services have gone up over the recent years in excess of the Supporting People Grant Funding. This approach now provides the level of service required and demonstrates excellent value for money for our Supporting People governing body partners.

The second change in support services provided by the Trust during the year has been the increase in the Learning Disability Supported Living Team. This increase has been required due to the extra learning disability properties purchased within Poole. The increased team is required to meet tenants needs and enables the Trust to ensure its service delivery is consistent at all times. A person-centred planning approach is adopted with all support provided to each individual.



Tenants from the Trust's Supported Living schemes enjoying their 2006 Christmas disco

## Involving

Constant contact with our tenants, who are our customers, has again been an important part of our ethos at East Boro. Annual Forums at schemes, the Tenants Conference at Athelhampton House, individual scheme meetings on issues tenants have raised, the Tenants Satisfaction Survey, Tenants Newsletters and the development of the new Trust website have all helped with the tenant/landlord contact and relationship throughout the year. Many social activities from bingo, coffee mornings, organised trips, Christmas events and fundraising events, including fundraising activities for Macmillan Cancer, Breakthrough Breast Cancer and Dorset Women's Refuges have all taken place much to the enjoyment of all who have taken part. Wimborne Folk Festival was again a success with the Trust stall raising funds to go towards providing more new development opportunities.



## Support and Involving





# Financial Statement

## Balance Sheet as at 31st March 2007

<b>FIXED ASSETS</b>	<b>2006/2007</b>	<b>2005/2006</b>
Housing Properties -		
Gross Cost Less Depreciation	5,595,028	4,169,557
Less Housing Association Grant	2,219,677	1,427,677
	<b>3,375,351</b>	<b>2,741,880</b>
Other Assets	156,253	122,419
	<b>3,531,604</b>	<b>2,864,299</b>
Current Assets	749,730	403,386
Creditors falling due within 1 Year	995,810	100,150
Net Current Assets	-245,930	303,236
<b>Net Assets Less Current Liabilities</b>	<b>3,285,656</b>	<b>3,167,535</b>
<b>CREDITORS</b>		
Amounts falling due after more than 1 year	0	0
<b>CAPITAL AND RESERVES</b>		
Called up Share Capital	92	93
Future Projects Reserve	0	0
Income and Expenditure Account	3,185,564	3,061,882
Investment Revaluation Reserve	0	5,560
Designated Maintenance Reserve	100,000	100,000
Total Capital & Reserves	3,285,656	3,167,535
<b>TOTAL FUNDS</b>	<b>3,285,656</b>	<b>3,167,535</b>

A full copy of the Trust's Accounts are available from the Trust Offices on request.

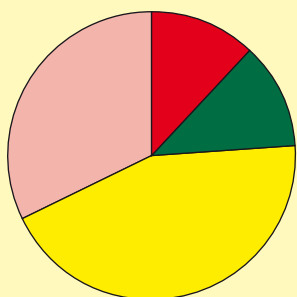
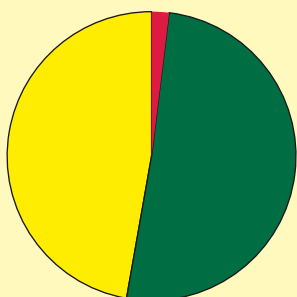




<b>INCOME</b>	<b>2006/2007</b>	<b>2005/2006</b>
Rental Income	730,797	694,253
Service Charges	225,896	205,336
Supporting People Grant	1,034,639	1,004,735
	<b>1,991,332</b>	<b>1,904,324</b>
Less Voids	13,525	2,381
Management Voids	6,651	4,864
	<b>1,971,156</b>	<b>1,897,079</b>
<b>EXPENDITURE</b>		
Repairs & Maintenance & Refurbishment Costs	226,468	192,962
Management Costs/ Sundry Costs	617,673	582,902
Service Costs (Excluding Maintenance Services)	224,067	207,924
Supported Living Support Contracts	830,045	816,611
	<b>1,898,253</b>	<b>1,800,399</b>
<b>OPERATING SURPLUS</b>	<b>72,903</b>	<b>96,680</b>
<b>OTHER INCOME</b>		
Donations and Bequests	10	1,000
Sundry Income	17,877	11,378
Investments	119	1,114
Sale of Investments	6	3,269
Surplus on Disposal of Fixed Assets	0	0
	18,012	16,761
<b>INTEREST</b>		
Interest Receivable	27,207	21,287
Interest Payable	0	-1,564
<b>TOTAL SURPLUS</b>	<b>118,122</b>	<b>133,164</b>

## Income and Expenditure Account for the year ended 31st March 2007

## Annual Accounts Graphs - 2007



## Trust Performance Statistics

### Income

Donations, Bequests, Interest, Sundry Income & Sale of Investments	45,219	2%
Supporting People Grant	1,034,639	51%
Rent & Service Charges	956,693	47%
<b>Total</b>	<b>2,036,551</b>	

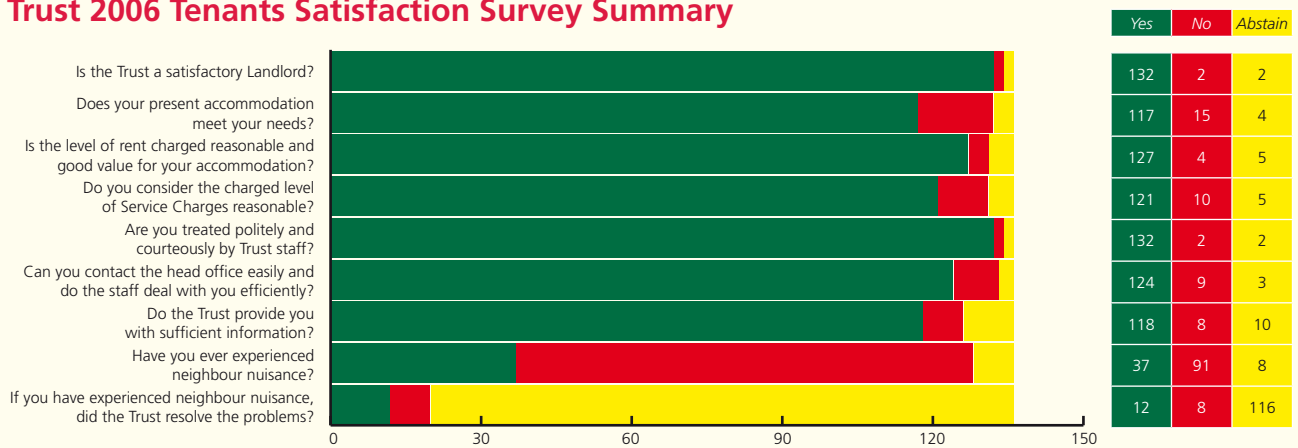
### Expenditure

Service Costs	224,067	12%
Repairs, Maintenance & Refurbishment	226,468	12%
Supported Living Support Contracts	830,045	44%
Management/Sundry	617,673	32%
<b>Total</b>	<b>1,898,253</b>	

### Key Performance indicators

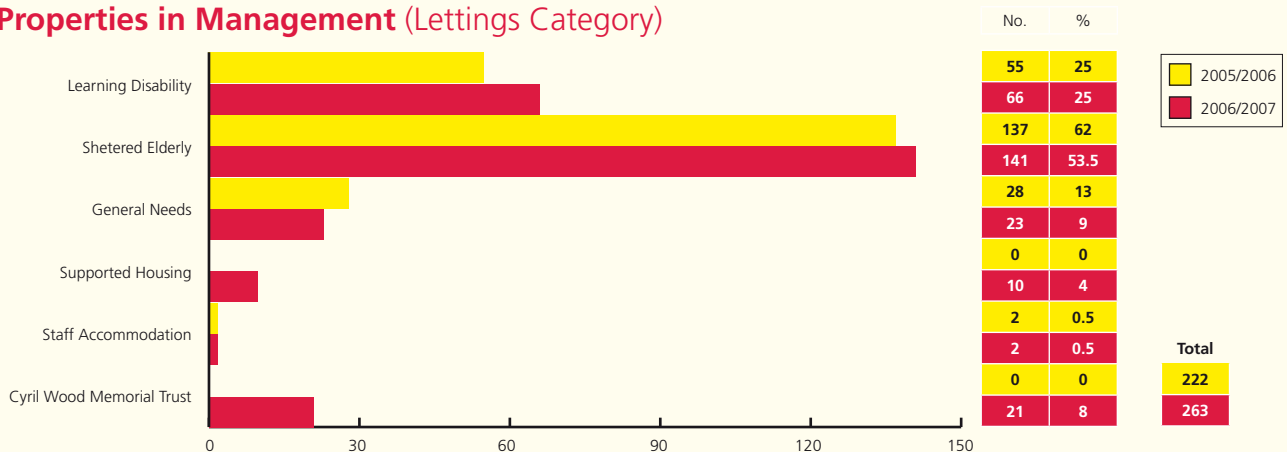
	2006/2007	2005/2006
Arrears as a percentage of Gross income	2.57%	1.98%
Voids as a percentage of Gross income	1.01%	0.38%
Average Void re let Time (Per day letting inc void and major refurbishment works)	26.2	9.3
Percentage of Units Available for Letting	0%	0%
Total Lettings Made	34	25
Lettings Made to Nominations from Local Authority	10	15
<b>Lettings Made To;</b>		
Adults with Learning Disabilities	8	1
Sheltered Elderly	17	18
General Needs	9	6
<b>Households which were;</b>		
White British	32	23
Irish	0	1
Other	2	1
<b>Repairs Performance Achieved;</b>		
Category 1 Emergency (24 hours)	100%	97.39%
Category 2 Urgent (5 Working Days)	99.02%	98.14%
Category 3 (4 Working Weeks)	98.44%	97.53%
Total jobs completed in above categories	1965	1649

## Trust 2006 Tenants Satisfaction Survey Summary

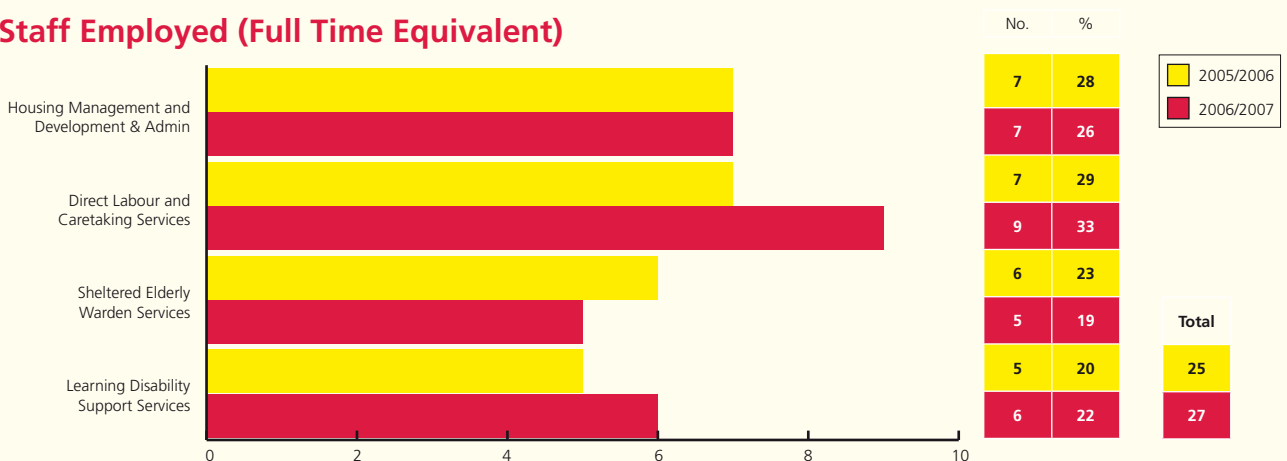


*The Trust strives at all times to provide the level of service expected by its tenants. It is fair to say that it is not always possible to undertake a 100% of all requests and a balanced approach to considering requests at schemes where neighbours may have different views is adopted at all times.*

## Properties in Management (Lettings Category)

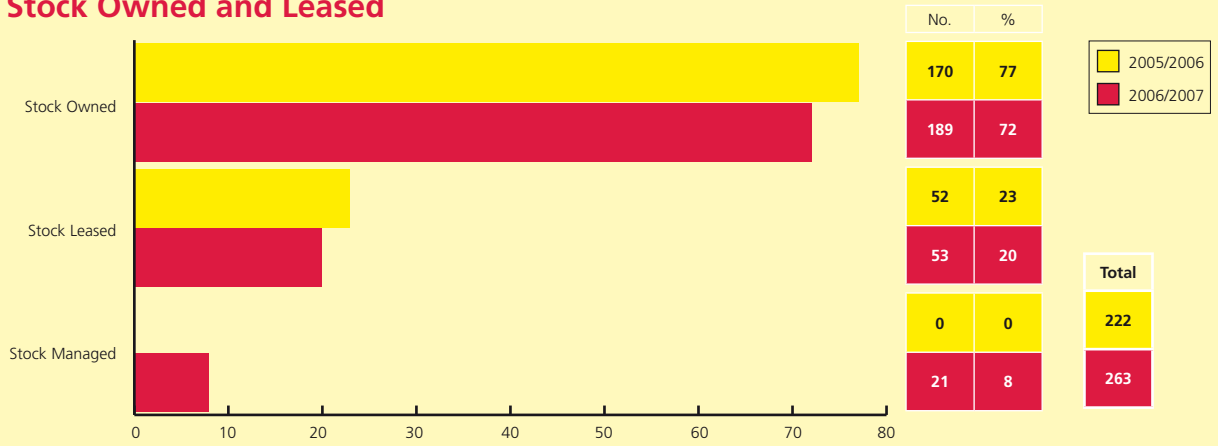


## Staff Employed (Full Time Equivalent)

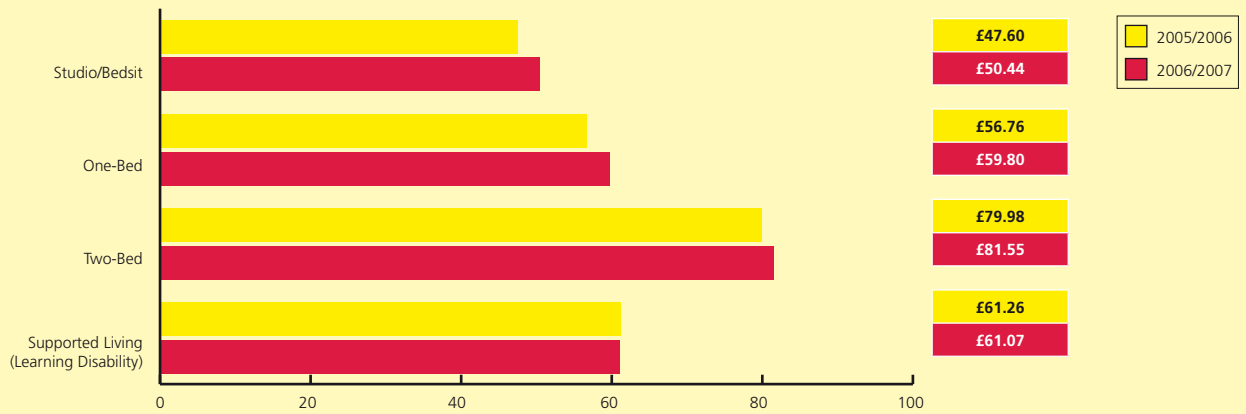




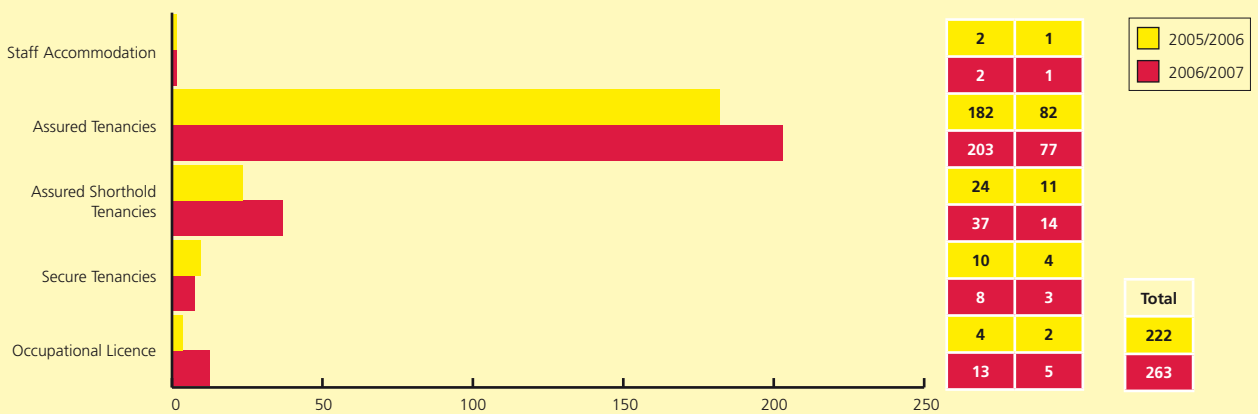
## Total Stock Owned and Leased



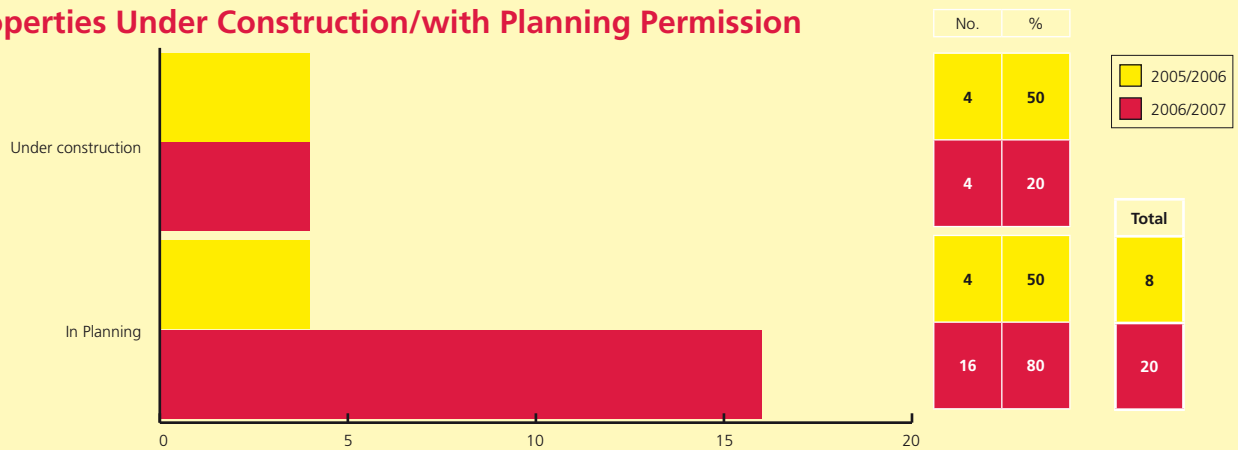
## Average Rents



## Tenancy Types



## Properties Under Construction/with Planning Permission





*"We are very happy with the Trust. They have been more than fair and have understood our problems. They have every reason to be proud of their staff who are always polite and very helpful."*

*"The support here is very good, all the staff are very good to us."*

*"Very Satisfied with the Trust."*

*"An all round good Trust and very accessible."*

*"I feel very lucky to be living here; everybody is so helpful."*

*"No complaints whatsoever."*

*"In general the last fifteen years have been the happiest I've known."*

*"I think the service is excellent."*

*"I am very happy living at Christophers and find all the staff friendly and helpful."*

*"I have lived at Dillon Court for 12½ years and I can honestly say the Trust has always looked after us all very well."*

*"I honestly cannot find any faults with living at Johns."*

*"We are very satisfied and happy here."*

*"I feel very happy with my flat."*

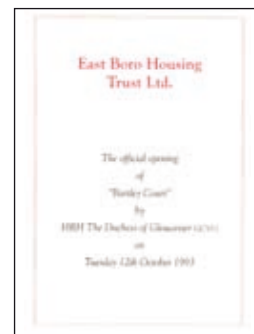
## Our Customers



## Archive

**Bartley Court** was opened in 1993 By HRH Duchess of Gloucester. Named in honour of the Trust founder Mrs Peggie Bartley, Bartley Court is situated in central Wimborne and provides 15 units (13 units when the scheme was first opened) of self contained accommodation for the sheltered elderly, a guest room, laundry facilities, and a community room which is enjoyed by all of the tenants at Bartley Court and the Trust's neighbouring sheltered scheme in East Borough. The cover photograph on this years Annual Report is the scheme today.

## Archive



*Pictures from the archives on the construction of Bartley Court and its opening by the Duchess of Gloucester*

East Boro Housing Trust would not be as it is today without the efforts of Peggie Bartley. Many people have benefited from a home and quality of life that may not have been their fortune without the desire and passion for social housing shown by Mrs Bartley. Her determination and dedication guided the Trust from its inception in 1960 right up until 1987 and continues to motivate our work today.



*Bartley Court today*





*Back Row*

**Mr David L. F. Cawdery** A.C.I.B. - IT Consultant - Co Opted to the Board in March 2003 and elected to the Board in June 2003 - served the Trust for 4 years. Vice-Chairman of East Boro Housing Trust and Member of the Finance Committee.

**Mr Richard Teather** - Chartered Accountant and University Lecturer - Co Opted to the Board in December 2004. Member of the Finance Committee.

**Mr Michael Butler** B.Sc. F.C.M.I , M.I.F.T - Company Director, Director of Rivermead House Ltd - served the Trust for 8 years. Member of the Building and Development and Operations Committees.

**Mr Nigel Spencer** B.A. (Hons) - Retired Managing Director of Care Home Company - Co Opted to the Board in June 2002 and elected to the Board in June 2003 - served the Trust for 5 years. Chairman of the Finance Committee.

**Mr Andrew Lanham** B.Sc. M.R.I.C.S. - Chartered Surveyor & Company Director - served the Trust for 10 years. Member of the Building and Development Committee.

**Mr John Garvin** F.C.A. Chartered Accountant - served the Trust for 16 years. Vice Chairman of the Finance Committee.

*Front Row*

**Mr Raymond Faulkner** FRICS, C.Eng, MICE Chartered Civil Engineer - served the Trust for 46 years. Chairman of the Building and Development Committee.

**Mrs Marilyn Osner** - Retired Civil Servant and Elected Councillor - Co Opted to the Board in 2002 and elected to the Board in June 2003 – served the Trust for 5 years. Member of the Operations Committee.

**Father Graham Smith** M.R.I.C.S., Dip.C.E. Priest and Chartered Surveyor - served the Trust for 16 years. Chairman of East Boro Housing Trust.

**Mrs Margaret Turner** B.A. Dip. Eur. Hum. (Open) M.C.S.P. Senior Physiotherapist (retired) - served the Trust for 16 years. Member of the Operations Committee.

**Mrs Patricia Pitkin** - Public Sector Administrator (retired) - served the Trust for 10 years. Member of the Finance Committee.

**Mr Malcolm Kell** - Retired Local Government Officer - served the Trust for 8 years. Vice Chair of the Building and Development Committee.

*Not pictured*

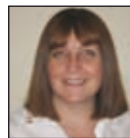
**Mrs Pamela Hoyle** Dip.C.O.T., S.R.O.T. - Occupational Therapist (retired) - served the Trust for 19 years. Member of the Building and Development Committee.



**Kevin Hodder** MCIH  
Chief Executive  
Appointed September 2000



**Maggie Love** Cert. CIH  
Trust Services Manager  
Appointed April 2003

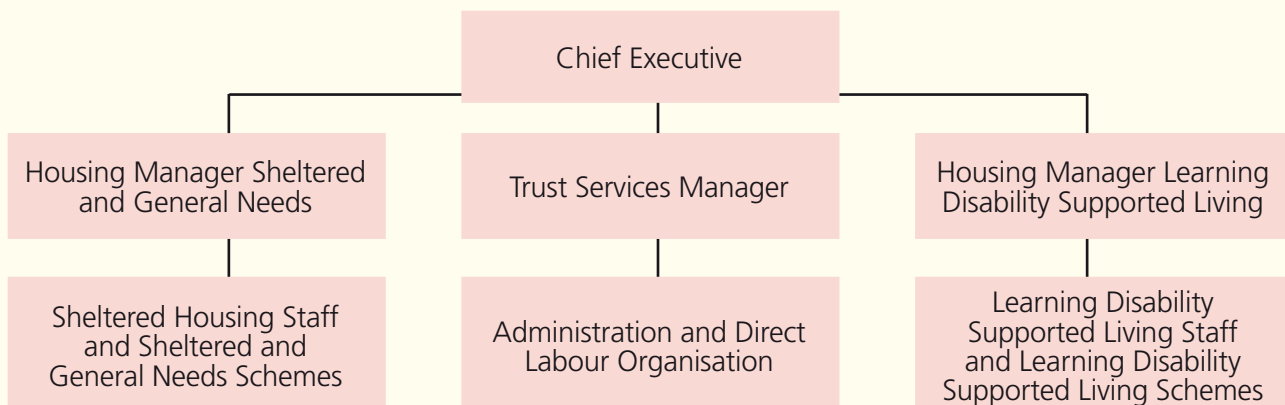


**Mary Stepin** LDAF  
Housing Manager  
Learning Disability Supported Living  
Appointed April 2003



**Jackie Wright**  
Housing Manager  
Sheltered & General Needs Housing  
Appointed July 2001

**Organisation/Structure Chart**





**NATIONAL  
HOUSING  
FEDERATION**  
member



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