



Glasgow and West of Scotland
Forum of Housing Associations



SHN

Scotland's Housing Network

ANNUAL RETURN ON THE CHARTER 2022-23

A COMPARATIVE REVIEW OF PERFORMANCE FOR
GLASGOW AND WEST OF SCOTLAND FORUM
OF HOUSING ASSOCIATIONS

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Brief summary

This Report presents a comparative summary of Glasgow and West of Scotland Forum of Housing Associations (GWSF) Members' performance against key indicators relative to the performance of non-member housing associations and co-ops ('Other RSLs') and local authorities (LAs).

Reviewing 2022/23 data, we can see that many measures of performance have begun to recover in the post-pandemic period, however tenant satisfaction is reducing across the sector and some critical areas of service – including repairs, relet times, and arrears – remain very challenging for a range of reasons.

Some key findings, particularly with reference to GWSF members, include:

- Overall satisfaction for the sector has continued to decrease. While GWSF tenants are still more satisfied with services than other RSLs, the gap has again narrowed slightly this year. Satisfaction amongst LA tenants remains relatively low, but this decline has to some extent slowed.
- Tenant satisfaction with how they are 'kept informed' and their 'opportunities to participate in decision-making' remains relatively high for GWSF members despite seeing a decrease in recent years. This suggests that community-based housing associations and cooperatives have been in a good position to respond to tenants' changing needs. Nevertheless, the gap between GWSF and other RSLs did narrow slightly this year in terms of satisfaction with opportunities to participate. Should budgets continue to tighten in 2023/24 and beyond, it may become more challenging for some landlords to justify some of the wider role work and communications strategies currently being employed.
- SHQS compliance remains lower for GWSF members than for other RSLs and sector averages. This year electrical safety testing (EICR) has been the major contributing factor in this, and while we have seen significant improvement across the sector, factors such as securing access, labour, and materials, and increasing costs continue to impact on compliance. Perennial issues like properties which cannot be reasonably or affordably converted to meet SHQS space standards, as well as older tenement blocks in multiple ownership, remain pertinent, perhaps especially for GWSF members.
- No data was collected by the Regulator this year on EESSH, however Scotland's Housing Network (SHN) voluntary data indicates that RSLs continue to perform well, with other RSLs particularly seeing improvement in EESSH compliance.
- GWSF members continue to record quicker average response times for reactive repairs than other RSLs and local authorities, however 2022/23 has seen an increase in Emergency

repairs timescales for GWSF members on average, while satisfaction with repairs has continued to reduce. Nevertheless, repairs satisfaction remains higher for GWSF members than for other RSLs. The gap between GWSF members and other RSLs in terms of non-emergency repairs timescales has also narrowed slightly this year.

- Tenancy turnover for the sector is returning to pre-pandemic levels, but GWSF members have seen a slower increase.
- GWSF members again let a lower proportion of their homes to homeless households than other RSLs this year, but again important to factor in context, including geographical locations and stock types.
- GWSF members continue to perform better than other RSLs on average in tenancy sustainment. With regard to tenancy sustainment for lets to homeless households, this remains higher than other RSLs, but the gap has significantly narrowed this year.
- GWSF members once again saw a higher rate of tenancies ending for negative reasons this year (abandonments and evictions) relative to other RSLs and local authorities.
- While anti-social behaviour complaints have reduced for the sector, these remain higher for GWSF members, but we continue to see strong tenant satisfaction with landlords' management of the neighbourhood. Although this has reduced in 2022/23, satisfaction amongst GWSF members' tenants by this measure remains high.
- Current arrears performance continues to improve on average for GWSF members during 2022/23, while other RSL average arrears increased.
- Despite the many challenges faced by landlords this year, GWSF members on average saw a reduction in re-let times, with the gap between the two RSL groups widening as the other RSL group average relet times increased.

Introduction

Scotland's Housing Network (SHN) is delighted to have been asked once again by our colleagues at Glasgow and West of Scotland Forum of Housing Associations (GWSF) to produce a report comparing the performance of GWSF members to that of other RSLs and local authorities. As with last year, a supplementary Microsoft PowerPoint presentation has been produced and can be made available to GWSF members upon request.

This report uses the data provided by social landlords in Scotland to the Scottish Housing Regulator by 31 May 2023, reporting on performance during the previous financial year, 2022/23. The report presents aggregated data for three types of social landlord, namely GWSF members, 'Other RSLs' and local authorities. For context we have also provided data for the 'SHN Average', which is effectively our calculated average for the sector as a whole. All aggregate data calculations are based on the data available to us at the time of writing – September 2023.

We have used GWSF membership as at September 2023 to collate aggregate information relating to this group. The following organisations were included as GWSF members for the purposes of this report:

Abronhill Housing Association	Hawthorn Housing Co-operative
Ardenglen Housing Association	Hillhead Housing Association 2000
Argyll Community Housing Association	Homes for Life
Atrium Homes	Kingsridge Cleddans Housing Association
Ayrshire Housing	Linstone Housing Association
Barrhead Housing Association	Linthouse Housing Association
Bridgewater Housing Association	Lochfield Park Housing Association
Cadder Housing Association	Maryhill Housing Association
Calvay Housing Association	Milnbank Housing Association
Cassiltoun Housing Association	Molendinar Park Housing Association
Cathcart & District Housing Association	New Gorbals Housing Association
Cernach Housing Association	ng homes
Cloch Housing Association	North View Housing Association
Clydebank Housing Association	Oak Tree Housing Association
Copperworks Housing Association	Paisley Housing Association
Craighdale Housing Association	Parkhead Housing Association
Cunninghame Housing Association	Partick Housing Association
Drumchapel Housing Co-operative	Pineview Housing Association
Dunbritton Housing Association	Prospect Community Housing
East Kilbride and District Housing Association	Queens Cross Housing Association
Easthall Park Housing Cooperative	Rosehill Housing Co-operative
Elderpark Housing Association	Ruchazie Housing Association
Ferguslie Park Housing Association	Rutherglen and Cambuslang Housing Association
Glasgow West Housing Association	Shettleston Housing Association
Glen Oaks Housing Association	Shire Housing Association
Govan Housing Association	Southside Housing Association
Govanhill Housing Association	Spire View Housing Association

Thenue Housing Association
Tollcross Housing Association
Trafalgar Housing Association
West of Scotland Housing Association

West Whitlawburn Housing Co-operative
Whiteinch and Scotstoun Housing Association
Williamsburgh Housing Association
Yorkhill Housing Association

The 'Other RSL' group included all non-GWSF member RSLs at September 2023 for the purposes of collating aggregate data. As with last year, we have included Wheatley Homes Glasgow (formerly known as Glasgow Housing Association) in the 'Other RSL' group. Similarly, the Local Authorities aggregate data presented here now excludes Wheatley Homes Glasgow from these calculations. Previous years' datasets have been amended to reflect this position.

Context

While the previous two years (2020/21 and 2021/22) could be broadly described as 'pandemic years', with significant interruption to various landlord functions and services as a direct consequence of the coronavirus pandemic and subsequent national lockdowns, 2022/23 could be said to represent the first full 'recovery year', as services began to return to something like normality.

Nevertheless, we can still see many of the pandemic's impacts in this year's data.

- Satisfaction for the sector as a whole – across almost all measures – continues to decline, with anecdotal evidence from landlords suggesting that tenants' expectations are higher, and that a general sense of malaise is still prevalent.
- Challenges with the supply of labour and materials continue to be an issue for many landlords, and as such critical indicators like repairs timescales and relet times have been impacted.
- Gas safety fails remain an issue for a small number of landlords, with contractor issues being cited by a few landlords as the cause of this.
- The cost of living crisis has also clearly had an impact on arrears for many organisations, as tenants attempt to balance their household budgets in the face of increasing costs.
- Homelessness across Scotland continues to increase, putting further strain on social landlords to meet the needs of those owed a duty.

Again, while we can see this year some shoots of recovery, it is likely that it will take some time for many measures of performance to return to pre-pandemic levels.

Tenant Satisfaction

Of the 62 GWSF members, 35 RSLs had new surveys during 2022/23, while 55 of the other RSLs have carried out a survey since 1 April 2021.

Overall Satisfaction

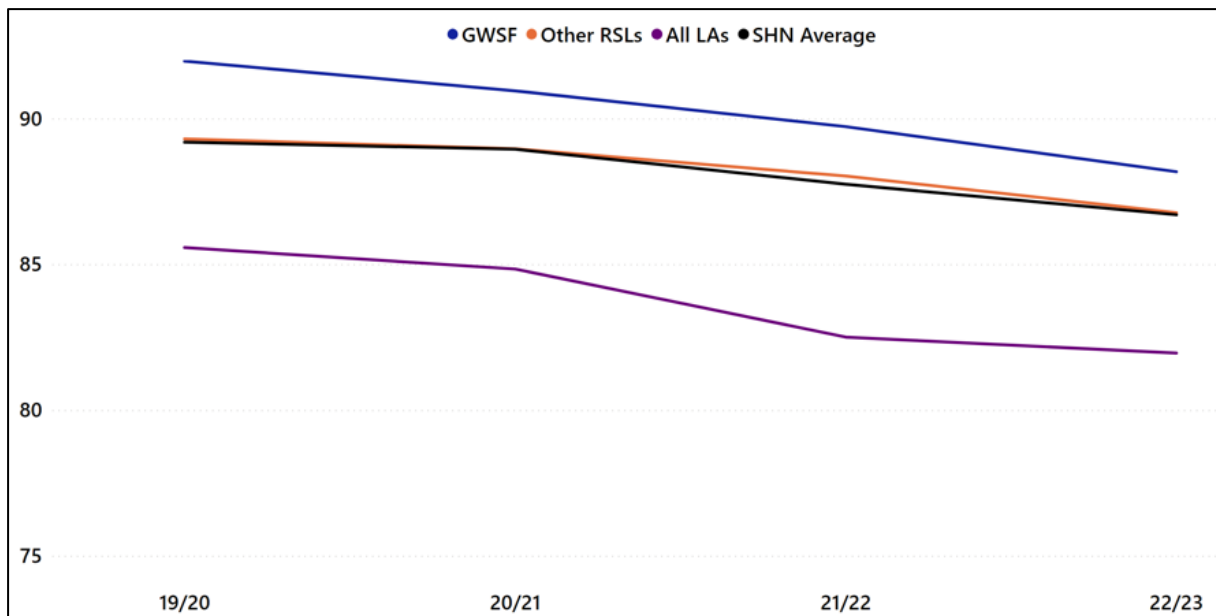
Looking first at tenants' satisfaction with the overall service provided, we can this year again see the continuing downward trend that has been evident in recent years. Figure 1 shows the position for GWSF members relative to other landlords. GWSF members have tended to see a higher rate of satisfaction amongst their tenants than for other RSLs and the SHN average, and that remains the case for 2022/23.

Despite this, satisfaction amongst GWSF tenants has reduced from around 92% in 2019/20 to around 88% in 2022/23, while satisfaction amongst Other RSL tenants has seen a slower reduction from around 89% to around 87% this year.

While local authorities last year saw a significant reduction in satisfaction, reducing from almost 85.5% satisfaction in 2019/20 to 82.5% in 2021/22, this trend has to some extent slowed in 2022/23.

This year we can be more confident when looking at averages since almost all landlords have now carried out surveys in the context of the pandemic, however as always we should keep in mind that the 3 year survey cycle many landlords employ can make drawing conclusions more challenging.

FIGURE 1: INDICATOR 1 - PERCENTAGE SATISFIED WITH OVERALL SERVICE



When we look at those GWSF members who have completed a new survey since 1 April 2022, we can once again see that most members are individually reporting less overall satisfaction amongst

their tenants, with only nine organisations reporting improvements relative to their previous survey. This is, however, a similar picture to that seen for the sector as a whole: see Figure 3.

FIGURE 2: INDICATOR 1 - PERCENTAGE SATISFIED WITH OVERALL SERVICE - CHANGE FROM PREVIOUS SURVEY (GWSF MEMBERS ONLY)

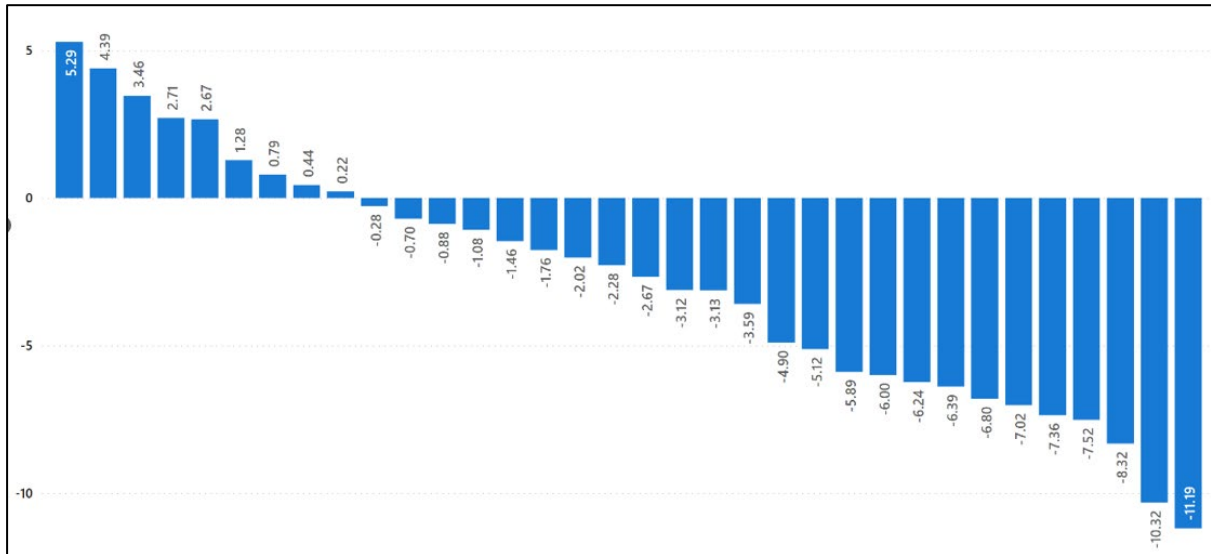
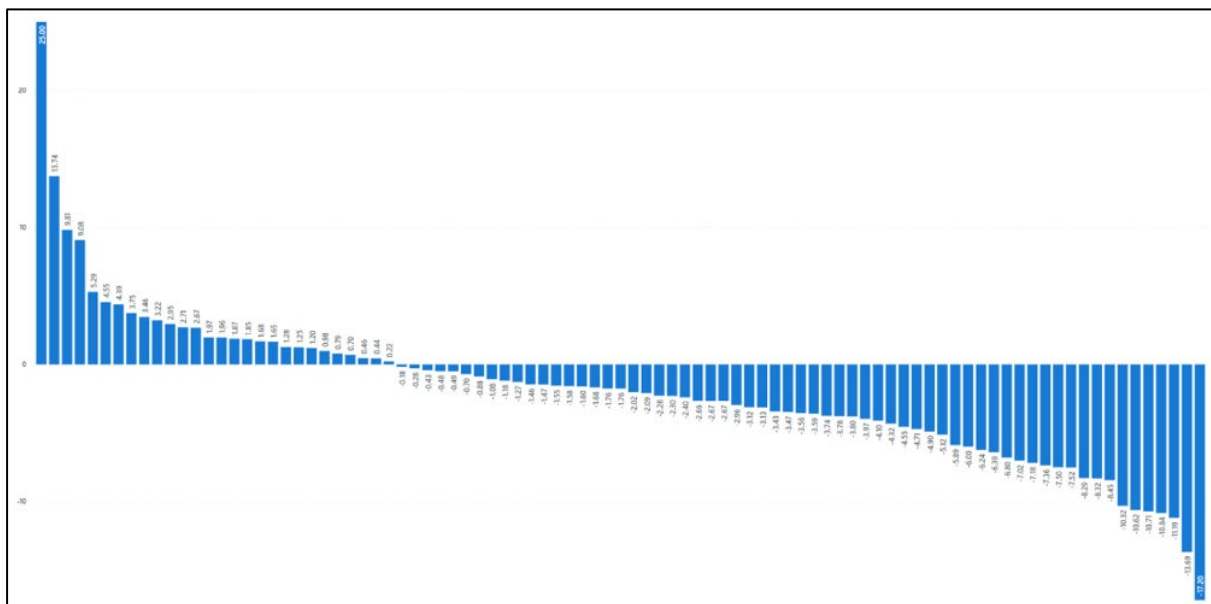


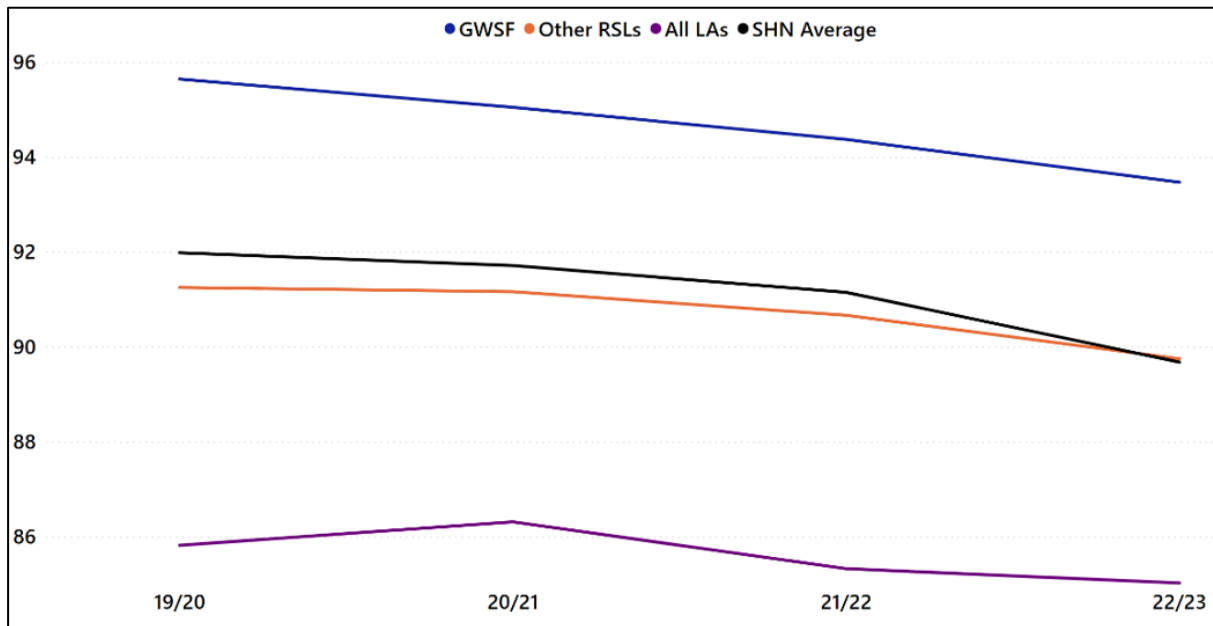
FIGURE 3: INDICATOR 1 - PERCENTAGE SATISFIED WITH OVERALL SERVICE - CHANGE FROM PREVIOUS SURVEY (ALL LANDLORDS)



Kept informed and opportunities to participate

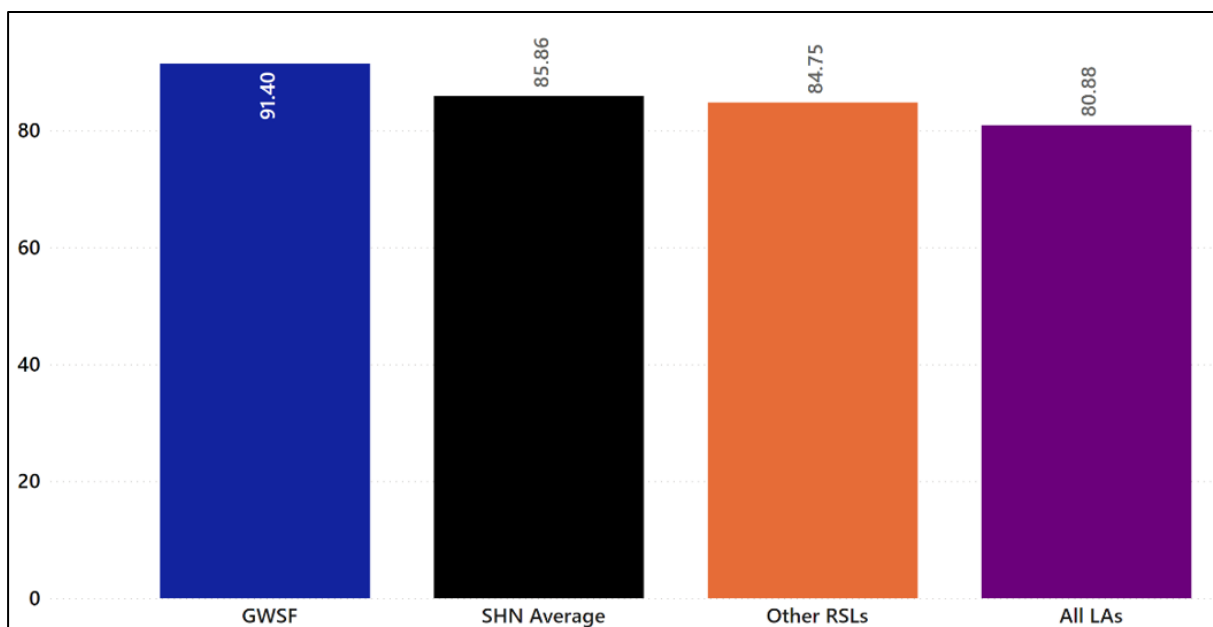
Turning now to look at tenant satisfaction with how landlords keep them informed about service decisions, Figure 4 shows again a reduction over the last few years for RSLs, yet satisfaction amongst the tenants of GWSF landlords remains high. Satisfaction for GWSF members' tenants was around 93.5% compared to around 90% for other RSLs and a little over 85% for local authorities. Both GWSF landlords and other RSLs have seen an average reduction of around 0.9% in satisfaction by this measure. LA satisfaction remains low but appears to be starting to level off this year.

FIGURE 4: INDICATOR 2 – PERCENTAGE TENANTS WHO FEEL LANDLORD IS GOOD AT KEEPING THEM INFORMED ABOUT SERVICES AND DECISIONS



Satisfaction with opportunities to participate for the sector reduced in 2020/21, recovering somewhat in 2021/22 but has again seen further slight reduction in 2022/23 as more organisations have carried out surveys.

FIGURE 5: INDICATOR 5 - PERCENTAGE TENANTS SATISFIED WITH OPPORTUNITIES GIVEN TO THEM TO PARTICIPATE IN LANDLORDS' DECISION MAKING



GWSF tenants have once again expressed a considerably higher level of satisfaction than other RSL peers. 91.4% of GWSF tenants noted satisfied with opportunities to participate compared to around

85% of other RSL tenants and about 81% of local authority tenants, although these gaps narrowed slightly in 2022/23.

When looking at both these indicators of satisfaction, we should again consider the post-pandemic context, and the trends seen earlier in this report around overall satisfaction. Models of service delivery for many landlords changed in 2020/21 to adhere to national restrictions and guidelines, and while most RSLs have returned to provision more in line with the position pre-pandemic, this isn't universally the case. During the pandemic, traditional methods of communication and tenant participation were for many no longer possible or appropriate and, as such, satisfaction may have reduced because of this. That being said, we would again reiterate the great work many members were able to achieve during this challenging period, with organisations further cementing their community anchor role, supporting the work of local community groups, working more holistically with tenants and promoting digital inclusion. The satisfaction levels seen above indicate that community-based housing associations and co-operatives continue to be in a particularly strong position in responding to their tenants' changing needs.

Despite this, should budgets continue to tighten in 2023/24 and beyond, it may become more challenging for some landlords to justify some of the wider role work and communications strategies currently being employed and, as such, these indicators will be worth watching in the years to come.

Asset Management

Scottish Housing Quality Standard (SHQS)

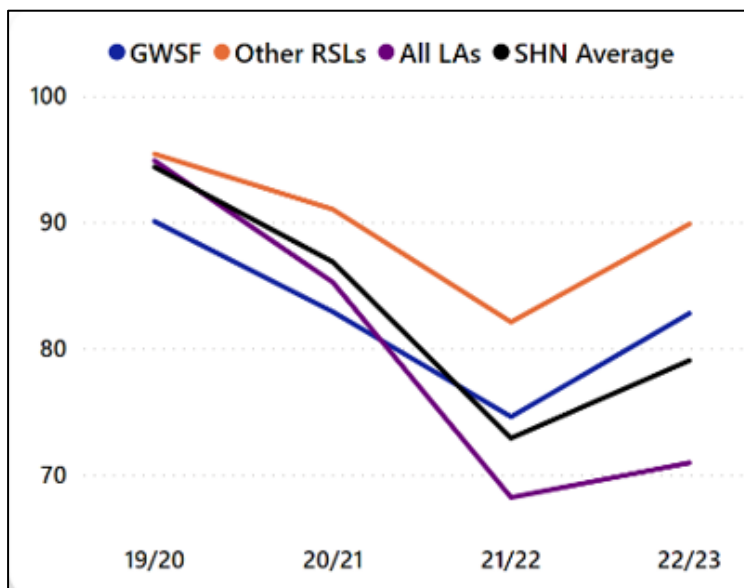
2020/21 and 2021/22 saw several changes to the Scottish Housing Quality Standard (SHQS) which have impacted on compliance across the sector. For 2020/21's return, the Energy Efficiency Standard for Social Housing (EESH) was added as an element within the SHQS, and as such failures against this standard should have been reflected in the SHQS. Many organisations had to resubmit data, and an updated dataset was released in April 2022. All data used by SHN reflects the updated data.

In 2021/22, a new requirement for an Electrical Installations Condition Report (EICR) within the last five years for each property was introduced as an element of the SHQS, while new Fire Safety regulations (LD2) were introduced as an additional element, requiring installation of prescribed numbers of smoke and heat alarms in each home depending on the property's characteristics. The two elements are included in both the "Healthy, Safe and Secure" and "Tolerable Standard" criteria of the SHQS, and so failure against one of these elements would mean recording failure by "two or more" criteria.

In 2022/23, the initial Guidance in relation to EICR had been that passing and failing depended not only on a valid certificate being in place at year end, but also on whether this certificate had been issued within five years of the preceding certificate. The Regulator’s position on this changed in late April 2023, and so a valid Certificate at financial year end became the criterion for passing this element of SHQS. It will be interesting to see whether refreshed indicators look to capture the number of EICR certificates outwith the five year threshold in the future. At the moment, the Regulator simply asks that comment be provided on this.

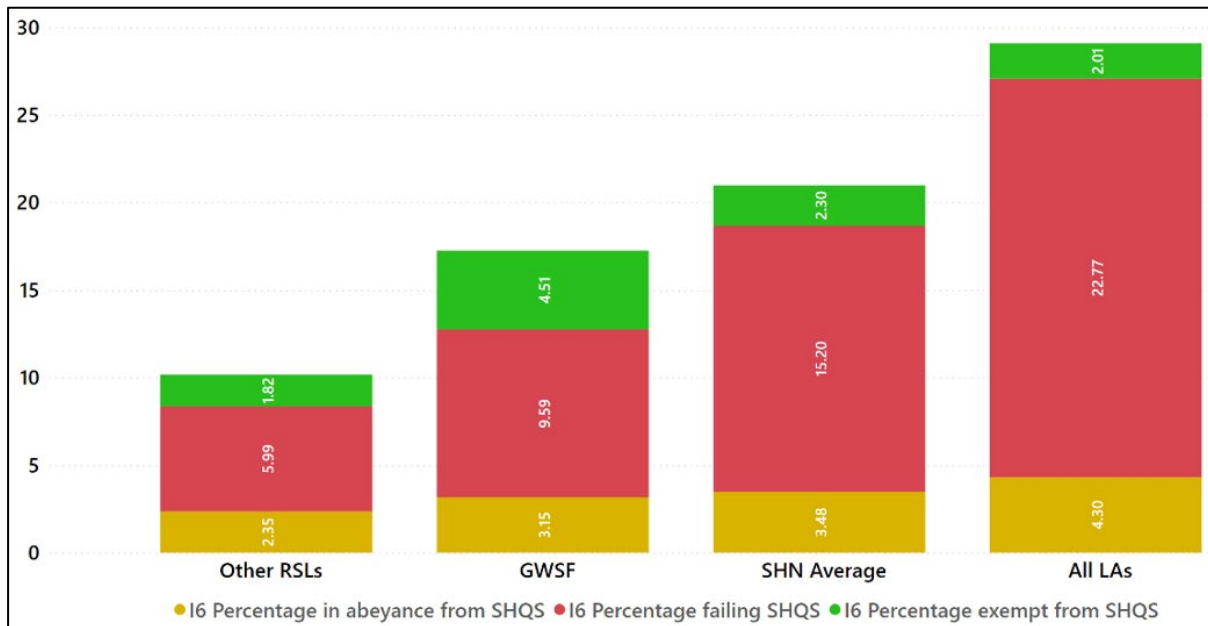
Looking at trends over the last few years in Figure 6, we can see that both GWSF and other RSL landlords saw reductions in SHQS compliance in both 2020/21 and 2021/22, before seeing significant improvement in 2022/23. Nonetheless, GWSF landlords continue to fair less well in terms of compliance than other RSLs. GWSF landlords improved compliance this year from 74.6% in 2021/22 to almost 83%, however other RSLs moved from around 82% last year to almost 90% this year.

FIGURE 6: INDICATOR 6 - PERCENTAGE OF PROPERTIES MEETING SHQS AT YEAR END



Talking to members, the common themes with SHQS compliance during 2022/23 have tended to be around securing access to carry out EICR works. Other perennial issues – such as stock which cannot reasonably or affordably be upgraded to meet SHQS, or issues involving blocks in multiple ownership – persist for several organisations (notably GWSF members with a high proportion of older tenements), but EICR appears to once again be the main factor this year for many. Figure 7 provides a summary of how different summary groups compare in terms of SHQS abeyances, fails and exemptions.

FIGURE 7: INDICATOR 6 - PERCENTAGE PROPERTIES IN ABEYANCE, FAILING OR EXEMPT FROM SHQS AT YEAR END



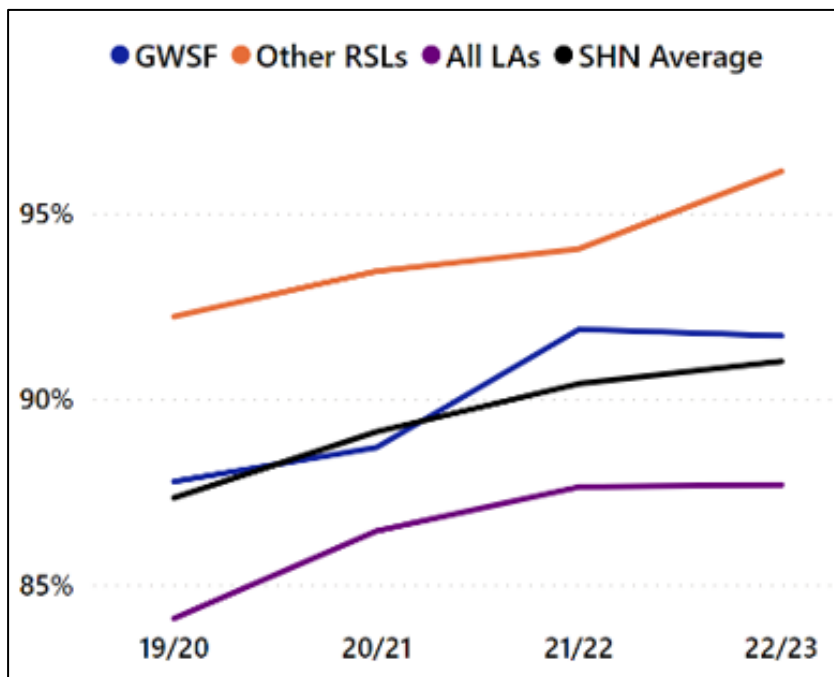
Labour and materials shortages have also been a common theme this year, with a number of contractors – and indeed individual tradespeople - exiting the social rented sector in favour of more lucrative private sector work, and in turn having an impact on many elements of asset management, repairs and voids performance.

In addition, there continues to be differing approaches to access for EICR and Fire Safety works – with some organisations forcing access, for example. The approaches employed by landlords are again likely to impact on the ability to ensure compliance with these criteria.

Energy Efficiency Standard for Social Housing (EESH)

This year the Scottish Housing Regulator did not collate data on the Energy Efficiency Standard for Social Housing (EESH) other than as an element within SHQS, however Scotland’s Housing Network opted to collate this data on behalf of our members. We asked members to complete C10 and C11 as they normally would for the Regulator, and we received 73 voluntary EESH returns of which 52 of these were from RSLs, including 20 GWSF members.

FIGURE 8: C10 - SELF-CONTAINED PROPERTIES MEETING EESSH



EESSH data for 2022/23, therefore, is based on this limited sample, and as such should be taken with a considerable pinch of salt. Based on this limited data, it appears that other RSLs have seen a continuing increase in properties meeting EESSH, while GWSF members have seen a slight reduction in compliance by this measure. Nevertheless, overall, we can see RSLs continue to perform well in terms of meeting energy efficiency standards.

While some of these trends may be down to the limited data, we have seen something of a levelling off in EESSH compliance amongst local authorities (having received data from 21 councils). Informal feedback has indicated that this levelling off is the consequence of reaching the more difficult-to-treat stock, and this may also be the case for RSLs.

The years to come will bring changes to the EESSH standards, and as such more challenges lie ahead for many landlords looking to balance affordability with meeting their statutory and regulatory obligations.

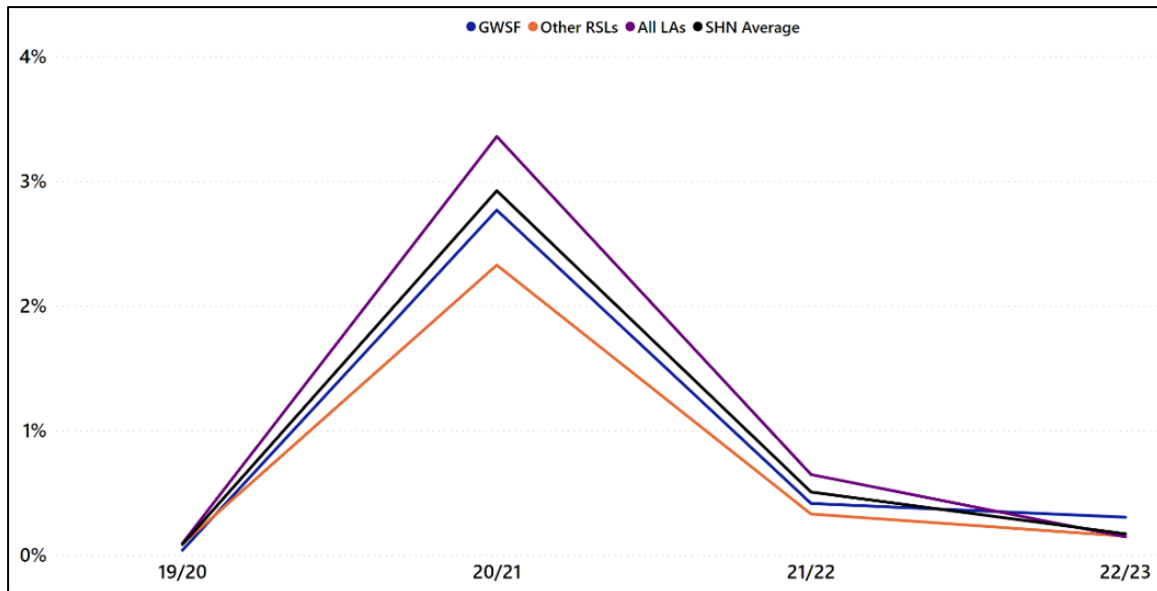
Gas safety

2022/23 has seen considerable improvement for most organisations in terms of meeting landlords' duties to carry out gas safety checks.

Gas safety fails increased dramatically across the sector during 2020/21 as landlords struggled to secure access and when resources were stretched by staff absences.

Figure 9 shows gas safety fails as a percentage of lettable stock. From this we can see that pre-pandemic gas safety fails were few and far between for the sector, with particularly good performance amongst GWSF members.

FIGURE 9: INDICATOR 11 - GAS SAFETY FAILS AS A PERCENTAGE OF LETTABLE STOCK



2020/21 saw a dramatic increase in the number of gas safety fails across the sector. At this point GWSF members' fails as a percentage of lettable stock - equating to around 2,384 gas safety fails - were higher than other RSLs but considerably lower than that for LAs. 2021/22 saw improvement across the sector but fails were still far higher than social landlords would have wished.

In 2022/23, we can see that GWSF members' gas safety fails have reduced as a percentage of lettable stock, but this is still higher than for other aggregate groups. As with the wider sector, it is important to recognise that this year gas safety fails have been predominantly found among a small number of organisations, with most GWSF members recording either zero or one gas safety fail(s), and only eight GWSF members reporting more than five.

While any gas safety fails represent a significant failure in performance, it is nonetheless important to understand this wider context.

Reactive Repairs

GWSF members continue to record quicker average response times for reactive repairs than other RSLs and local authorities, however 2022/23 has seen an increase in emergency repairs timescales for GWSF members on average, while satisfaction with repairs has continued to reduce.

Work Volume

In 2022/23, the sector saw a decrease in the number of emergency repairs completed. As we can see below, this was primarily driven by local authorities completing fewer emergency repairs – both GWSF members and other RSLs saw a significant increase in the volume of emergency repairs during the year.

The sector saw an increase in non-emergency repairs carried out, perhaps surprisingly given the high volume of non-emergency repairs completed in 2021/22, which included some degree of backlog from the pandemic year of 2020/21.

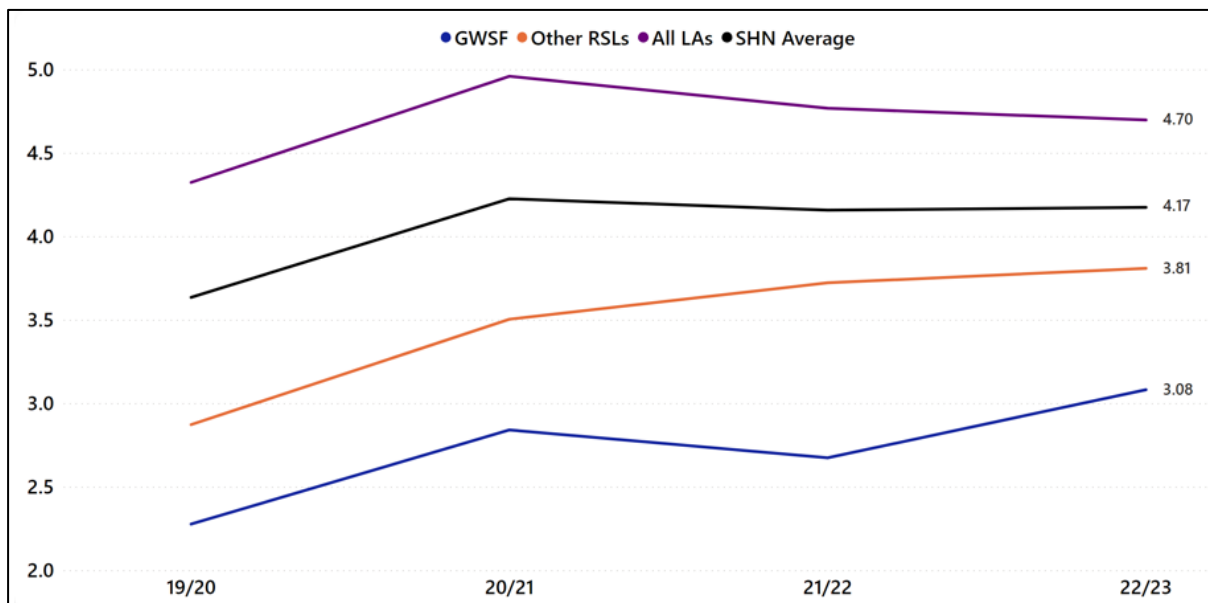
Table 1: Indicator 8 and 9 – Emergency and Non-Emergency Repairs completed

		2021/22	2022/23	Change
GWSF members	Emergency	79,644	81,602	2.5%
	Non-Emergency	198,440	209,731	5.7%
Other RSLs	Emergency	201,543	208,210	3.3%
	Non-Emergency	504,178	546,012	8.3%
Local Authorities	Emergency	337,467	315,076	-6.6%
	Non-Emergency	575,048	588,954	2.4%

Emergency Repairs

2022/23 saw an increase in timescales for GWSF landlords. Other RSLs also saw an increase in timescales to respond to emergency repairs, but this increase was not as steep, effectively narrowing the gap slightly between GWSF and RSLs by this measure. Nevertheless, GWSF members have continued to respond promptly to emergency repairs over the last four years despite challenging circumstances – and in 2022/23 remained significantly quicker, at 3.1 hours, in responding to emergency repairs than both other RSLs (3.8 hours) and LAs (4.7 hours).

FIGURE 10: INDICATOR 8 – AVERAGE HOURS TO COMPLETE EMERGENCY REPAIRS



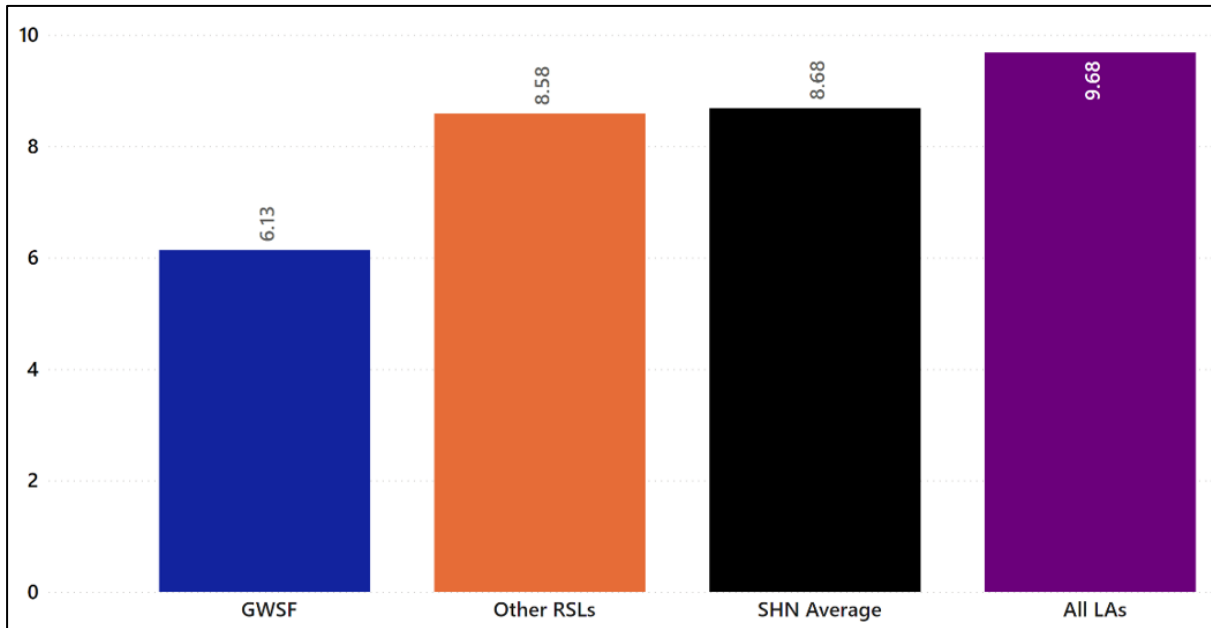
Non-Emergency Repairs

In the aftermath of the pandemic, the sector saw a significant increase in the time taken to complete non-emergency repairs, for the most part influenced by landlords trying to address the backlog of repairs from 2020/21.

This year, both GWSF landlords and other RSLs saw a reduction in non-emergency timescales but were by no means back at pre-pandemic levels. Various other factors already mentioned in this report, including issues relating to access, labour and material shortages have had an impact on timescales for many.

In Figure 11 we can see that GWSF members have continued to respond to non-emergency repairs on average quicker than their peers, at 6.1 working days, however timescales for other RSLs (8.6 working days) reduced to a greater degree than the reduction for GWSF landlords, and as such the gap between these groups has narrowed slightly this year. Local authorities saw an increase in average working days to complete non-emergency repairs this year, from 9.2 working days in 2021/22 to 9.7 working days in 2022/23.

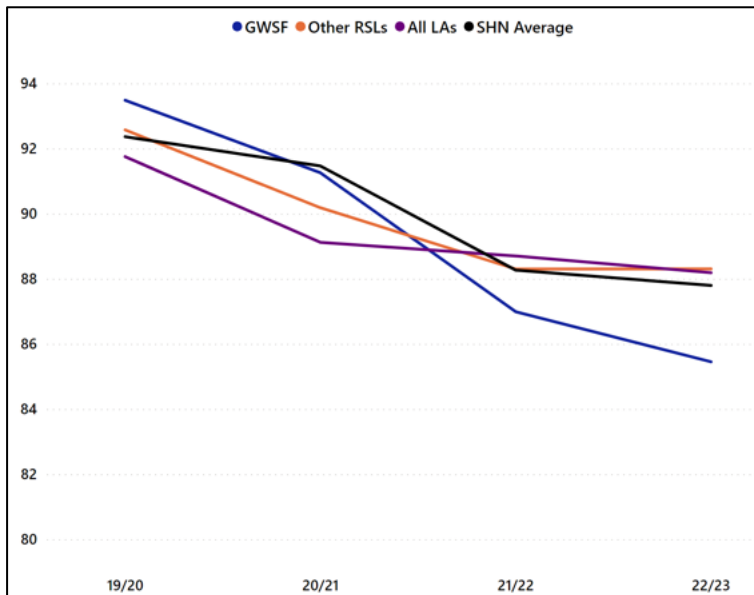
FIGURE 11: INDICATOR 9 - AVERAGE WORKING DAYS TO COMPLETE NON-EMERGENCY REPAIRS



Right First Time

Repairs completed 'Right First Time' remains a challenging indicator for a range of reasons. Reporting on this is time-consuming and complex, and from a benchmarking perspective the role of individual target times within this will also result in more variations in how good performance is defined between organisations than we would see with a more fixed indicator.

FIGURE 12: INDICATOR 10 - REPAIRS COMPLETED RIGHT FIRST TIME



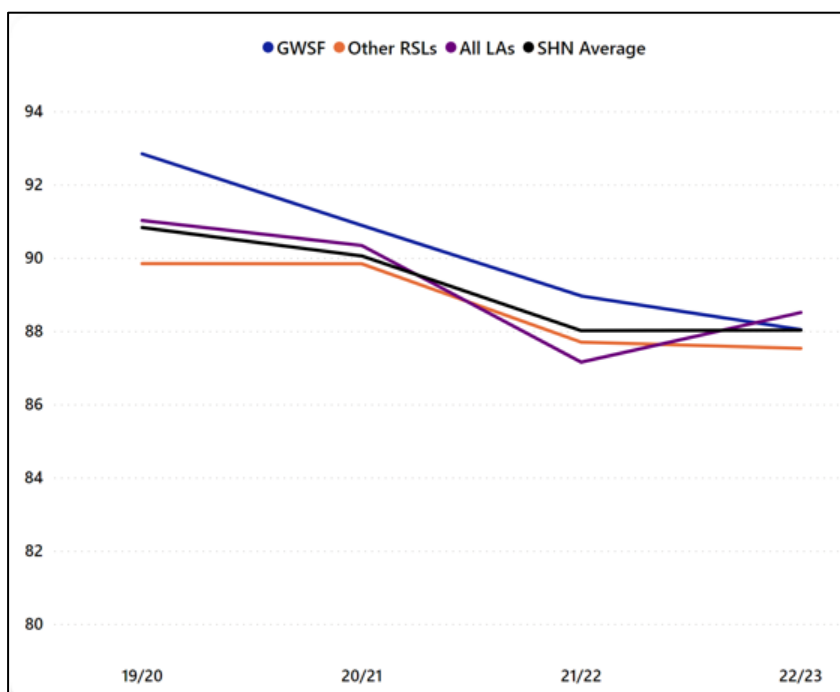
Prior to the pandemic, GWSF landlords reported a higher proportion of repairs completed Right First Time than other RSLs and local authorities, however since 2020/21, this proportion has reduced

significantly – from around 94% in 2019/20 to just 85.5% in 2022/23. This reduction is starker than that seen for other RSLs and local authorities (now both around 88%).

Repairs Satisfaction

Repairs satisfaction is another indicator which has tended to see a higher degree of satisfaction amongst GWSF members than for other RSLs and local authorities. Unfortunately, this year we can see that satisfaction by this measure for GWSF members – like much of the sector – has seen a continuing downward trend.

FIGURE 13: INDICATOR 12 - PERCENTAGE TENANTS SATISFIED WITH REPAIRS SERVICE



Starting from around 93% satisfaction in 2019/20, we can see that repairs satisfaction has reduced for tenants of GWSF landlords to just over 88% in 2022/23. While the other RSLs group has also seen a reduction in repairs satisfaction, the change between 2021/22 and 2022/23 is less steep, and as such the gap between the two groups has narrowed.

This perhaps speaks to the many challenges facing landlords at the current time, as also evidenced by repairs times continuing to be higher than pre-pandemic levels and reductions in the proportion of repairs completed Right First Time.

As with other indicators of tenant satisfaction, we should also consider this reduction in the wider context of greater overall dissatisfaction and increased tenant expectations discussed earlier in this report.

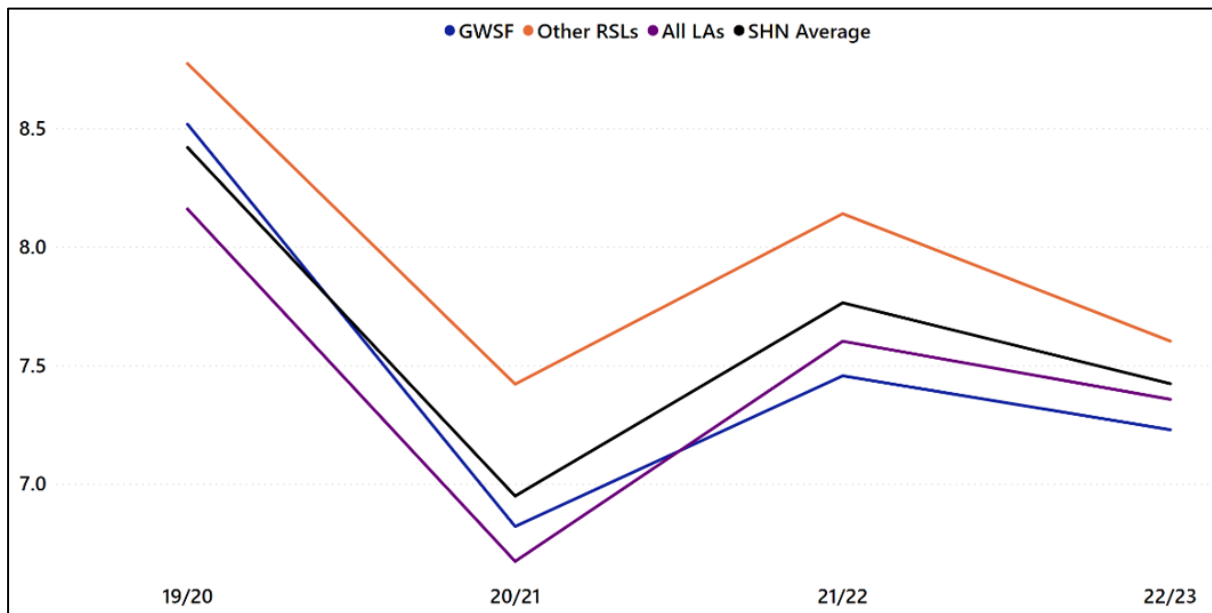
Again, it is important to recognise that not all organisations will be providing new data for this indicator in 2022/23, and so this data may be slightly skewed by data from older surveys.

Access to Housing

Stock Turnover

Pre-pandemic, GWSF members reported relatively high stock turnover compared to LAs, but still a lower level of turnover than that reported by other RSLs. The pandemic year saw a reduction for the sector as a whole in properties becoming available, as tenants stayed put during the national ‘lockdowns’ of 2020/21 and restrictions were introduced impacting on what actions landlords could take.

FIGURE 14: PERCENTAGE LETTABLE SELF-CONTAINED HOUSES THAT BECAME VACANT IN YEAR



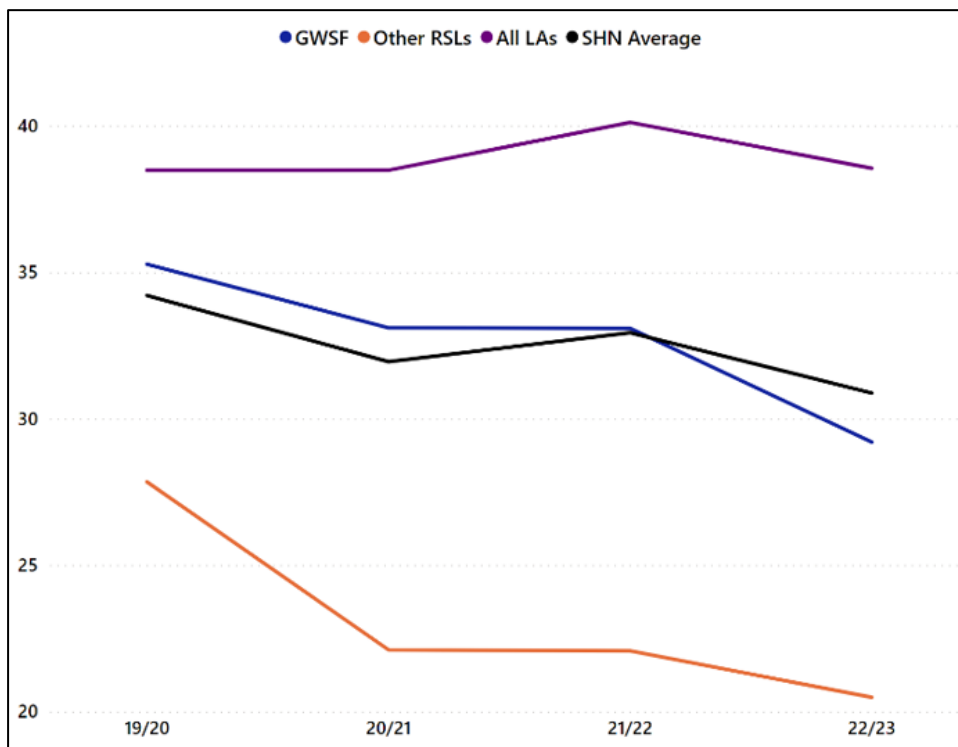
2021/22 saw turnover begin to return to pre-pandemic levels, with the Scottish average increasing from around 7% of lettable stock becoming void in 2020/21 to 7.8% the following year. GWSF members reported a similar ‘bounce’, however this was far less pronounced than that seen by local authorities and other RSLs. 2022/23 has seen something of a narrowing in the difference in levels of turnover between local authorities and other RSLs, however GWSF members’ turnover remains low – around 7.2% compared with 7.6% for other RSLs and 7.4% for LAs.

Turnover isn’t necessarily a performance indicator, given that many factors can play into this, including tenancy sustainment and transfer lets because of newbuild. This muddies the waters when it comes to benchmarking performance by this measure but should be viewed instead as an indication of the context within which landlords are operating.

Offers refused

This year has once again seen a continuing reduction in refusals for both RSL aggregate groups, with GWSF landlords seeing a particularly pronounced reduction – from 33% in 2021/22 to 29% in 2022/23. Nevertheless, GWSF landlords continue to see a higher rate of refusals than the other RSLs group – for whom approximately 20.5% of offers are refused. Local authorities continue to have the highest average rates of refusals at around 38.5% of offers refused.

FIGURE 15: INDICATOR 14 - PERCENTAGE TENANCY OFFERS REFUSED



Given the time and effort that goes into any offer, refusals can be seen to be a waste of resources and landlords will always be seeking to minimise these where possible.

Lets to homeless households

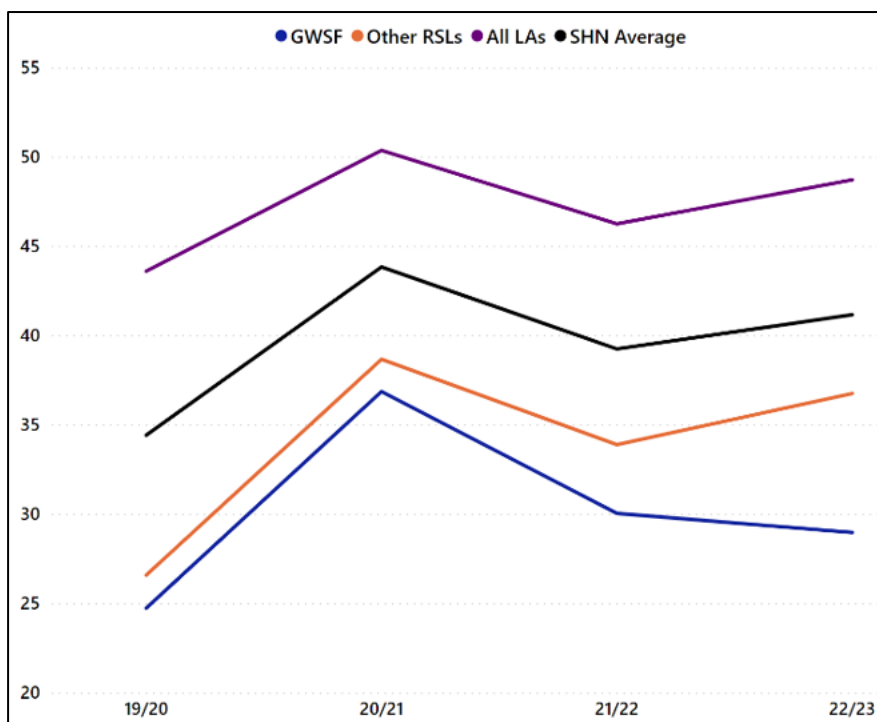
This year has seen a significant increase in homeless applications across Scotland, taking the total number well above pre-pandemic levels. Nevertheless, this increase has not been uniform across Scotland, with a number of local authority areas actually seeing a reduction in applications for assistance under homelessness legislation.

We can see by looking at certain indicators of throughput in the Scottish Government homelessness statistics (for example, live cases at year end, households in temporary accommodation at year end, length of stay in temporary accommodation, weeks to close case etc.) that some local authorities are having more challenges meeting their obligations than others.

Looking at RSL contributions to accommodating homeless households, we recognise that there are many factors beyond the numbers presented here that will play into the proportion of lets any RSL makes to homeless households. This can include mismatches in supply and demand regarding stock types and geography, individual households’ needs in terms of proximity to amenities and support, as well as the number of referrals the RSL actually receives from the local authority.

As such, while the indicator which follows is important, we must also consider the context within which each organisation is operating.

FIGURE 16: INDICATOR C2 - PERCENTAGE OF LETS TO HOMELESS APPLICANTS



As would be anticipated, local authorities continue to give the highest percentage of their lets to homeless households, given their direct duty to meet the needs of households found to be unintentionally homeless or threatened with homelessness – with about 49% of all LA lets going to homeless households. This proportion increased this year as LA’s worked to ensure the needs of those owed a duty were met.

The other RSLs group also increased the proportion of lets to homeless households this year, from around 34% last year to almost 37% this year. Meanwhile, the proportion of GWSF members’ lets to homeless households reduced this year, from just over 30% to just under 29% – but again it is important to recognise the various contextual elements that make up this statistic, primarily stock, geography, sustainability and volume/appropriateness of referrals. It seems likely that the particular pressures on Glasgow associations now to try to increase homelessness lets will see a higher % figure for GWSF members in 2023/24.

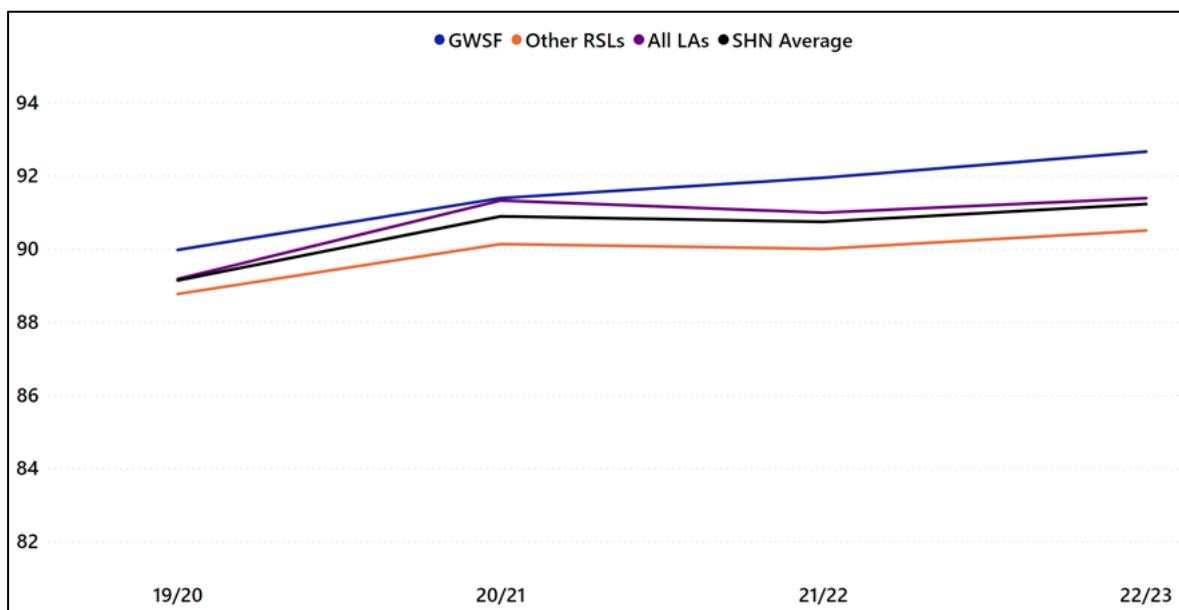
Tenancy Sustainment

All tenants

Tenancies can end for any number of reasons, and a tenancy not lasting a year doesn't necessarily indicate a 'failure' per se. As such, this indicator should be viewed with some caution. Organisations themselves will have a better understanding of the reasons behind tenancies ending early, and as such it's always good practice to take account of this contextual information.

Nonetheless, we can see that, by this indicator, tenancy sustainment has continued to improve for GWSF members, and remains significantly better than other aggregate groups, including other RSLs. Overall tenancy sustainment has increased from around 90% in 2019/20 to almost 93% in 2022/23.

FIGURE 17: INDICATOR 16 - PERCENTAGE TENANCIES BEGAN IN PREVIOUS YEAR REMAINED MORE THAN A YEAR - ALL



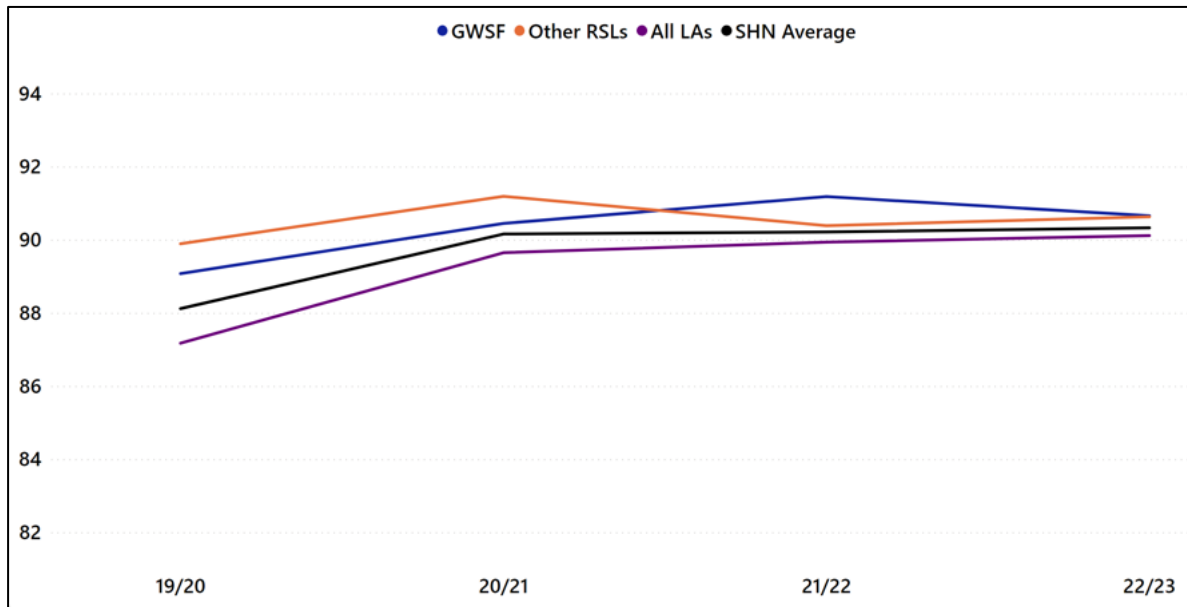
The other RSLs and LAs groups saw a reduction in tenancy sustainment in 2021/22 – possibly exaggerated by the lower number of lets during the preceding year – but have both seen an improvement in 2022/23.

Homeless households

This year we can see a slightly different picture for tenancy sustainment amongst households who were previously homeless. Since this number is always going to be smaller than the 'All tenancies' indicator above, we tend to anticipate more volatility, with this indicator increasing and decreasing year on year. Last year, we were able to report that GWSF members' tenancy sustainment amongst homeless households had increased to 91%, overtaking the other RSLs group, having previously tended to fare less well by this measure. 2022/23 has seen a narrowing in the gap between the two

RSL aggregate groups, with approximately the same level of tenancy sustainment in lets to homeless households. Local authorities have also seen an improvement this year but are still marginally behind RSL performance here.

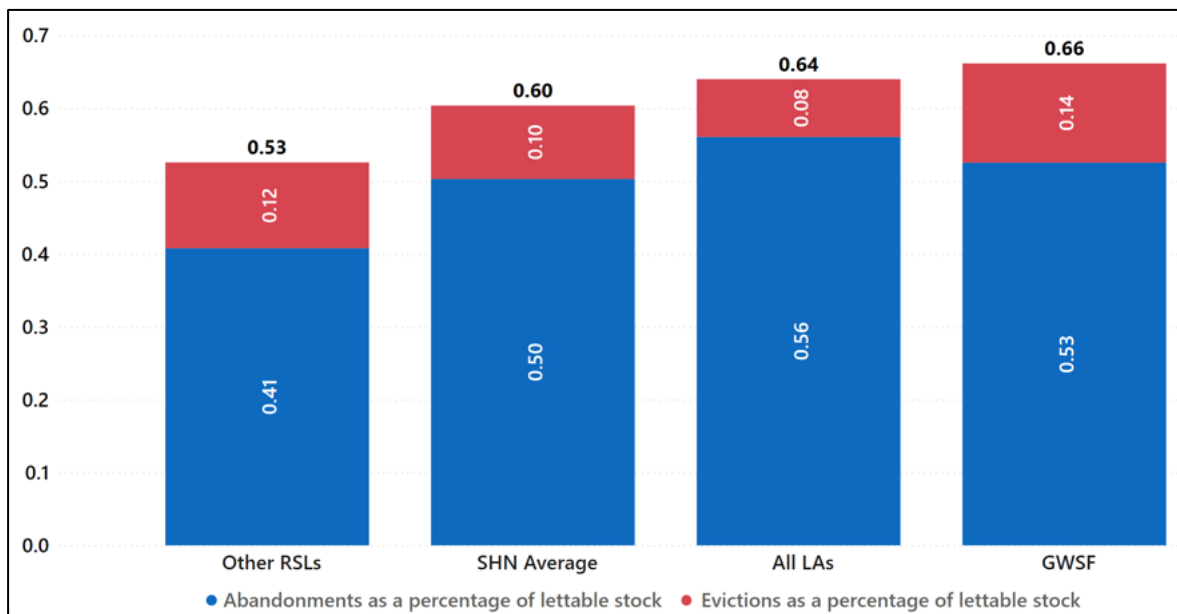
FIGURE 18: INDICATOR 16 – PERCENTAGE TENANCIES BEGAN IN PREVIOUS YEAR REMAINED MORE THAN A YEAR – APPLICANTS ASSESSED STATUTORY HOMELESS LA



Abandonments and Evictions

This year, we can again see that GWSF members reported a proportionately higher level of tenancies ending for negative reasons than their other RSL peers. Taking evictions and abandonments together, GWSF members saw tenancies ending for negative reasons equating to 0.66% of their total lettable stock, compared to only 0.53% for other RSLs. While GWSF members reported a lower proportionate rate of abandonments than LAs, the number of evictions seen last year was again proportionately higher than for the other aggregate groups, at 0.14% of lettable stock.

FIGURE 19: C4 ABANDONMENTS AND I22 EVICTIONS AS A PERCENTAGE OF LETTABLE STOCK

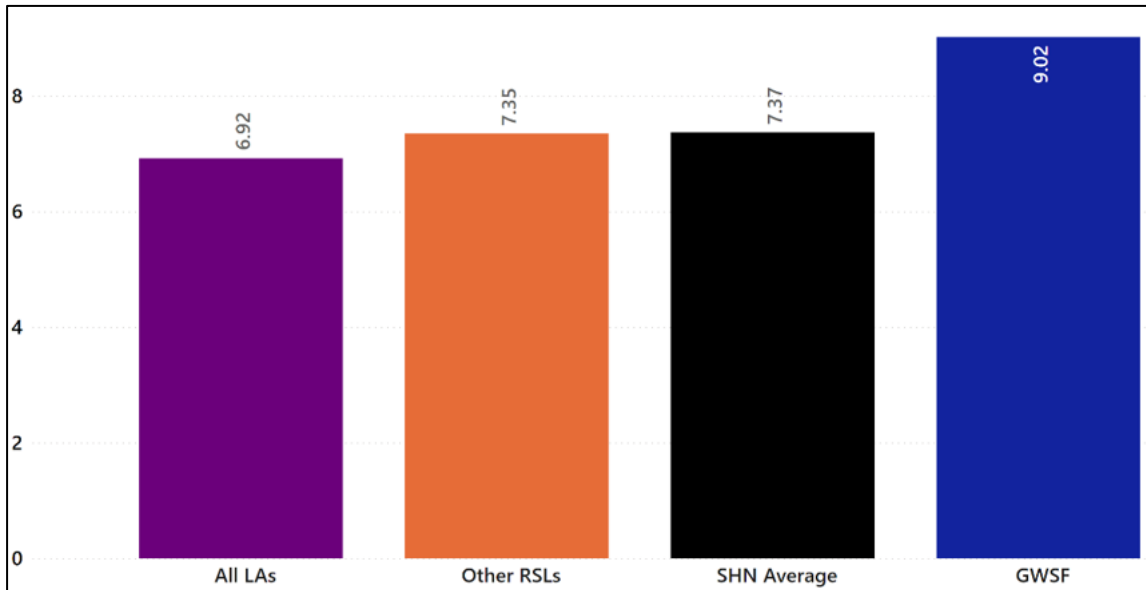


Anti-social Behaviour

Like last year, GWSF members again received a higher proportion of anti-social behaviour cases per 100 homes this year than other RSLs and LAs, and this has been the case since 2019/20 (further research would be needed to ascertain whether tenants whose landlord is very local might be more likely to report ASB). The pandemic year of 2020/21 saw a significant increase in the number of ASB cases for the sector, and both GWSF and other RSLs saw a similar picture, although the increase was more pronounced for the other RSLs group.

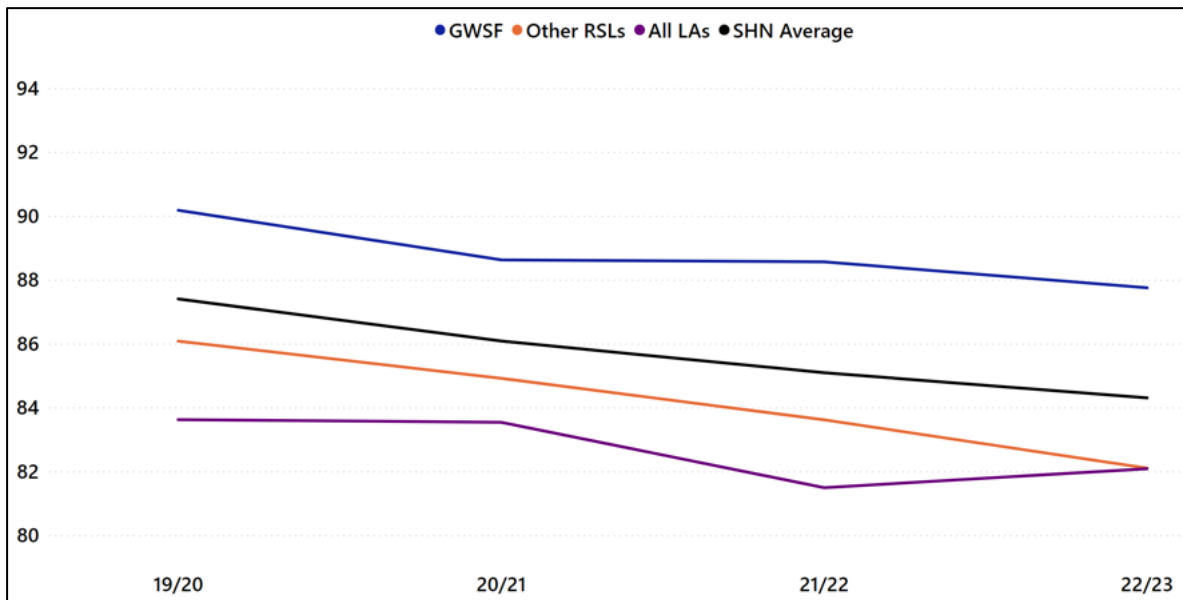
Both RSL aggregate groups have seen a reduction in the number of ASB cases overall as a proportion of stock in 2022/23, GWSF members' cases remain comparatively high at 9 cases per 100 homes. Meanwhile there has also been a reduction in LA ASB cases during 2022/23, taking the LA average below the average for the other RSLs group.

FIGURE 20: INDICATOR 15 ANTI-SOCIAL BEHAVIOUR CASES PER 100 HOMES



Turning now to tenants’ satisfaction with their landlords’ management of the neighbourhood, we can see that despite a reduction in satisfaction this year, GWSF members’ tenants remain considerably more satisfied by this measure than for other RSLs and LAs, and have seen a less steep reduction in satisfaction this year than that seen by other RSLs.

FIGURE 21: INDICATOR 13 - PERCENTAGE TENANTS SATISFIED WITH MANAGEMENT OF NEIGHBOURHOOD



This year, we can see that 87.8% of GWSF members’ tenants noted satisfaction with their landlords’ management of the neighbourhood, compared to just 82.1% of Other RSL tenants and LA tenants.

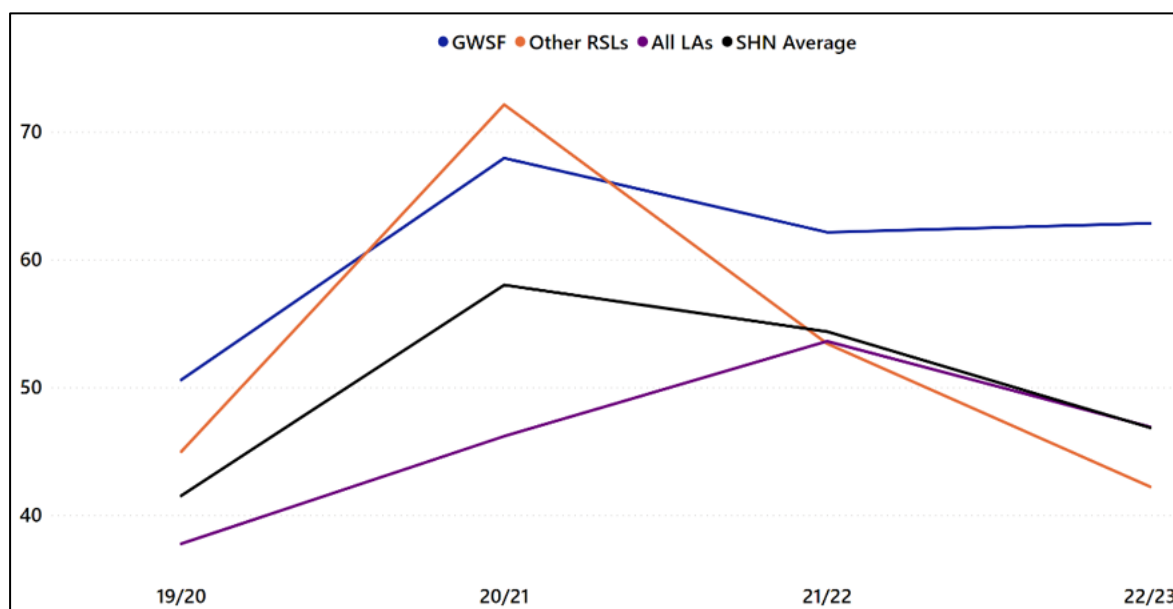
We can again this year infer that this is one of the advantages of community-based housing associations being uniquely placed to respond effectively to local issues and local needs.

Medical adaptations

This indicator remains a challenging one to benchmark. Average timescales for medical adaptations take in not only a range of factors outwith the landlords' control (the most significant being the availability of funding) but are also heavily dependent on the nature of the adaptations required in any given year. A landlord could, for instance, predominantly require to fit grabrails and, as such, their average timescale to complete would be very short, or alternatively could receive a number of very complex adaptations (i.e. through-floor lifts) that will by definition take much longer.

That being said, we can see that average timescales to complete medical adaptations have on the whole continued to reduce this year, following a spike during the pandemic year of 2020/21.

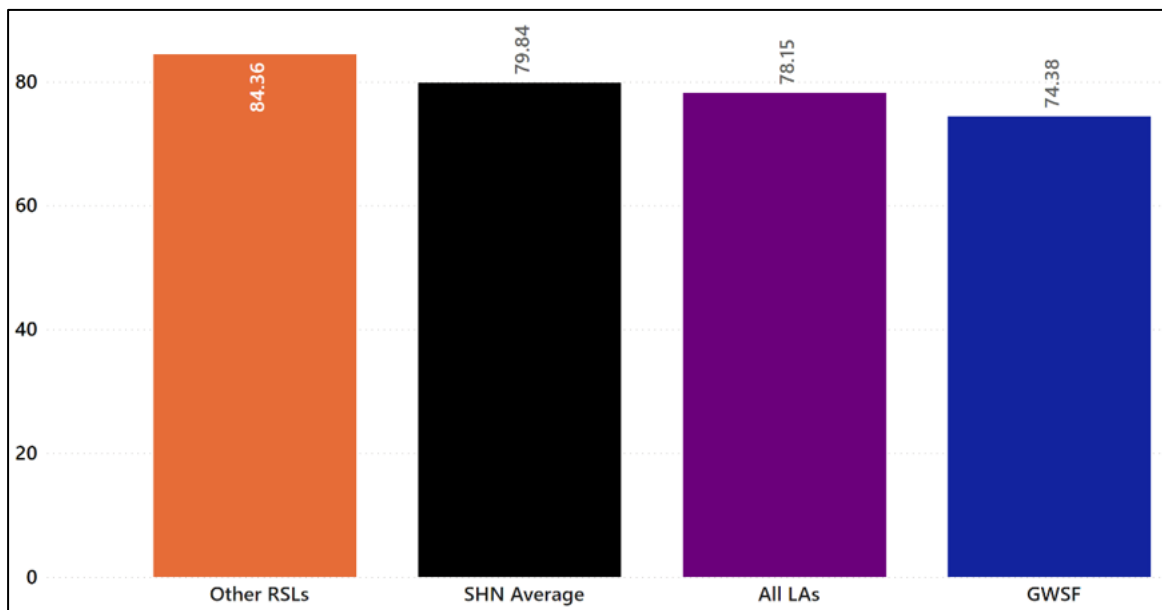
FIGURE 22: INDICATOR 21 - AVERAGE DAYS TO COMPLETE APPROVED ADAPTATIONS



This is particularly the case for the other RSLs group, which saw a reduction in average timescales in 2021/22 (to 53 days), and then a continuing reduction in 2022/23 to just over 42 days.

By contrast, GWSF members saw less of a reduction in 2021/22, and average timescales have in fact increased in 2022/23 and remain high at 63 days on average.

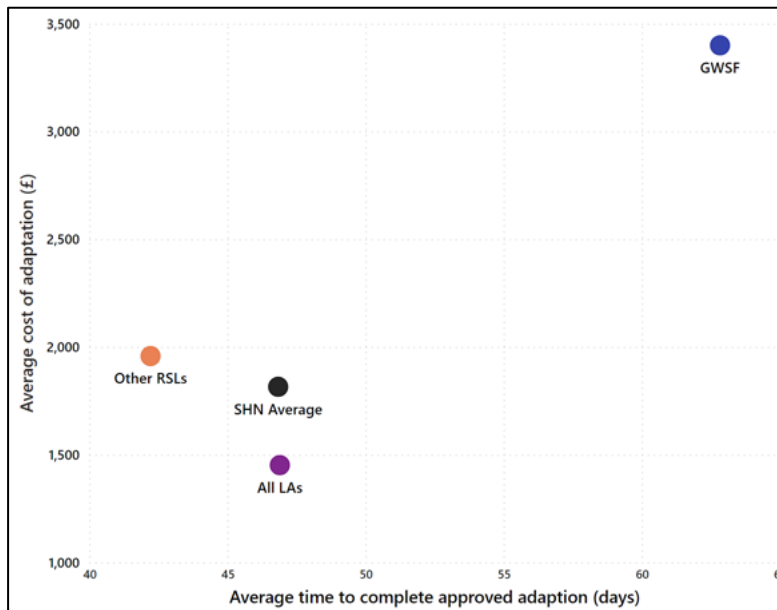
FIGURE 23: INDICATOR 19 - PERCENTAGE APPROVED APPLICATIONS FOR MEDICAL ADAPTATIONS COMPLETED



In terms of the proportion of approved applications completed in 2022/23, GWSF members have again completed a lower proportion of approved adaptations (74%) than other RSLs (84%). This has been the case for the last four years, with this year's performance again closer to the local authority average (78% completed) for this indicator than the other RSL group.

We have heard from our members throughout 2022/23 of the challenges they've been experiencing regarding both labour and material scarcity, as well as significant cost increases that are not being fully met by rent increases. In addition, smaller RSLs may be more dependent on the availability of funding than other RSLs, and so may find it more challenging to meet shortfalls between funding and costs. We can see in the chart below that GWSF landlords saw far higher average costs of adaptations than the other RSLs group – around £3,400 per adaptation compared to £1,958.

FIGURE 24: INDICATOR 21 - AVERAGE COST OF ADAPTATION VS AVERAGE DAYS TO COMPLETE APPROVED ADAPTATIONS



Rents and Value for Money

Average weekly rent

Rents for GWSF members’ tenants remain lower on average than that of other RSLs, with GWSF averages at £89.90 per week compared to £96.46 for other RSLs, although this gap narrowed somewhat in 2022/23.

FIGURE 25: C17 - LETTABLE SELF-CONTAINED UNITS - TOTAL - AVERAGE WEEKLY RENT

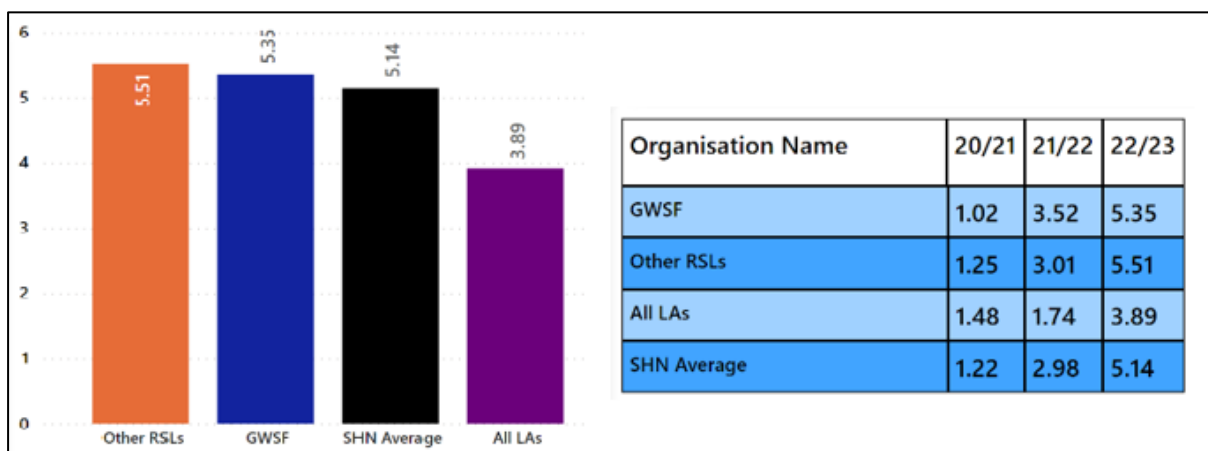
Organisation Name	20/21	21/22	22/23
GWSF	85.07	86.02	89.90
Other RSLs	91.87	93.68	96.46
All LAs	78.10	79.71	81.03
SHN Average	83.78	85.37	87.59

The gap between LA and GWSF rents widened this year, as GWSF members moved more in line with the other RSL group on average. It is important to recognise, however, that data on average rents doesn’t take into account differences in the size and type of stock. Comparison by apartment size is available to SHN Members via our new benchmarking tools.

Rent increase to be applied

During 2022/23, the Scottish Government announced a cap on rent increases until ‘at least’ Spring 2023, resulting in social housing providers frantically re-drawing their Business Plans to determine how they could continue to meet their various obligations to tenants under the prospect of a potential ‘rent freeze’ into 2023/24. The context in which this happened couldn’t have been starker, as landlords saw unprecedented increases in the costs of materials and services. In January of 2023, the Scottish Government heeded the representations of the sector, and ended the cap on rents in the social rented sector in March 2023, with Ministers satisfied that social landlords’ average increases would be likely to be well below inflation.

FIGURE 26: INDICATOR C5 - PERCENTAGE AVERAGE WEEKLY RENT INCREASE TO BE APPLIED NEXT YEAR



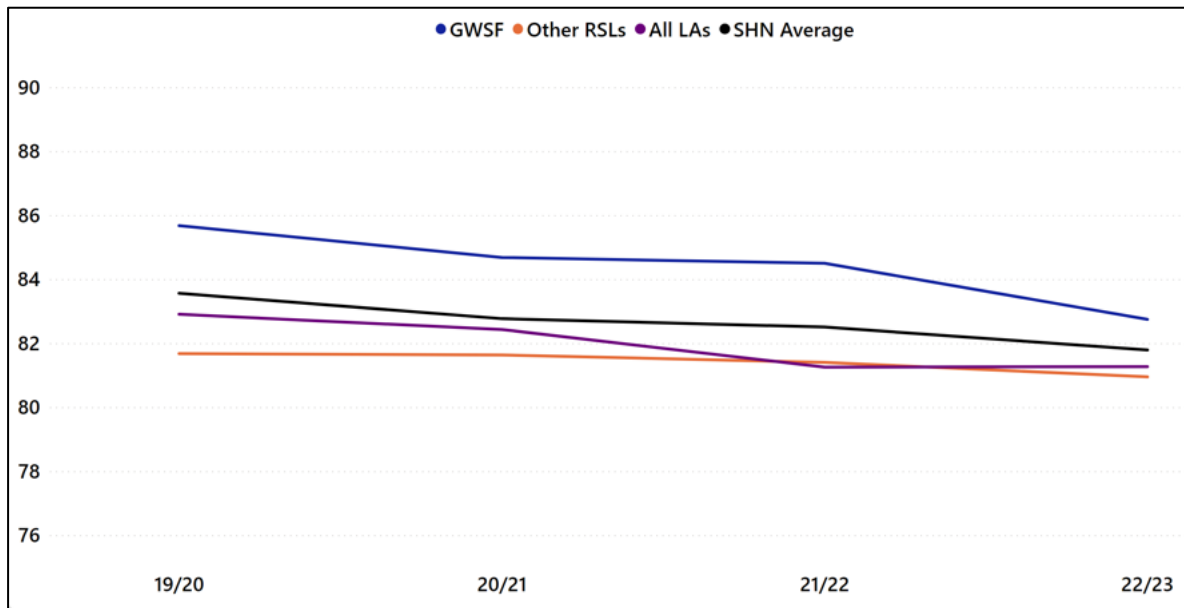
In this context, we can see that rent increases across all aggregate groups agreed in 2022/23 for April 2023 saw a significant spike but remained well below inflation levels.

GWSF members on average agreed a rent increase of 5.35% - less than the 5.51% on average agreed by other RSLs, with both RSL groups seeing a significantly higher increase than the 3.89% agreed by LAs.

Value for Money satisfaction

The sector as a whole has seen continuing reduction in the proportion of tenants who feel their rent represents good value for money. GWSF members continue to see satisfaction higher than the other aggregate groups, with 82.8% of GWSF members’ tenants indicating that they feel they are getting good value for money.

FIGURE 27: INDICATOR 25 - PERCENTAGE TENANTS WHO FEEL RENT FOR THEIR PROPERTY REPRESENTS GOOD VALUE FOR MONEY

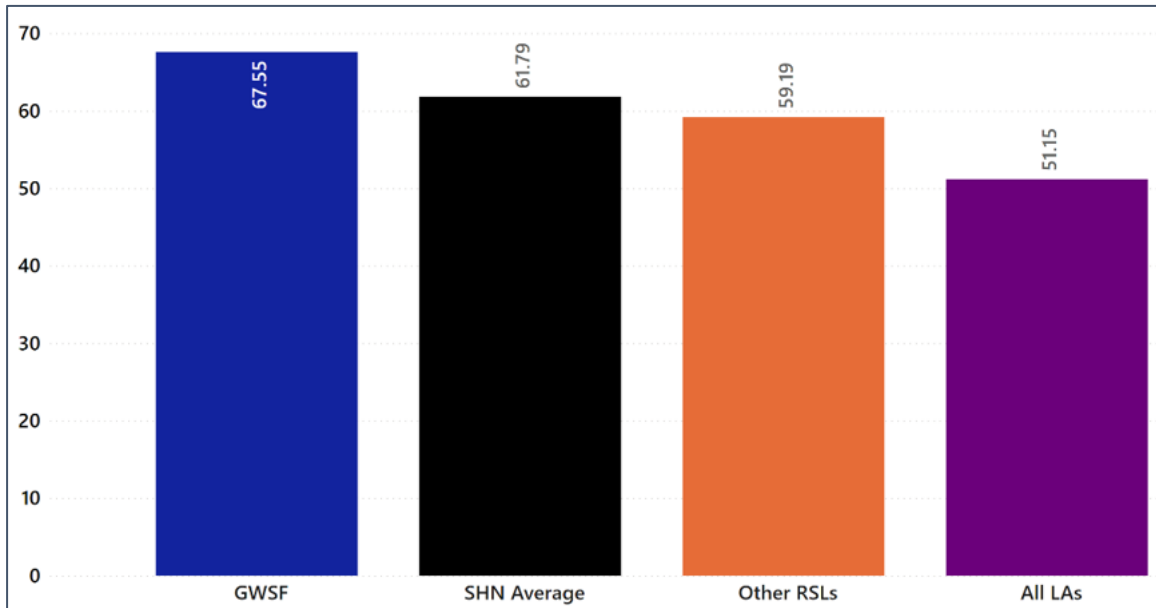


This compares favourably with both other RSLs (81%) and local authorities (81.3%), however the gap between the two RSL groups continues to narrow.

Factoring

Owners' satisfaction with factoring services provided by social housing landlords is typically far lower than tenants' satisfaction with service delivery. This year we can see there have been further reductions in satisfaction across aggregate groups, but that GWSF members with factoring services again saw relatively high levels of satisfaction among owners, at almost 68%. This compares very favourably to both other RSLs (59% satisfaction) and local authorities (51% satisfaction), again indicating that GWSF members are delivering local services efficiently and to a high degree of customer satisfaction.

FIGURE 28: INDICATOR 29 - PERCENTAGE FACTORED OWNERS SATISFIED WITH FACTORING SERVICE

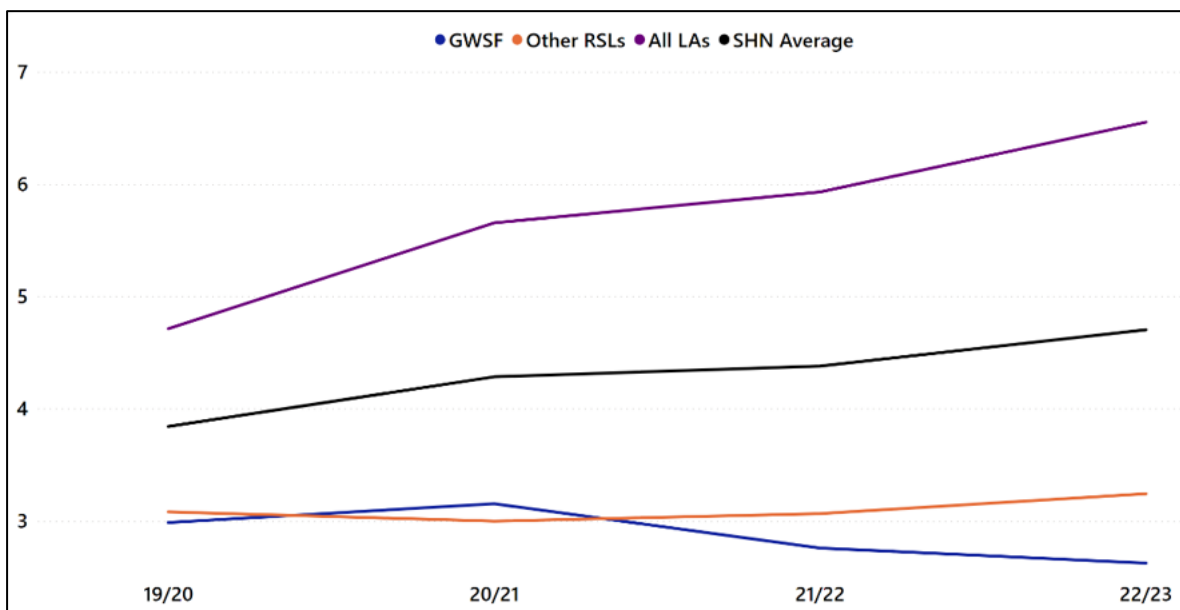


Rent Arrears Performance

Current Arrears

This year, we can again see a reduction in current arrears for GWSF landlords, reducing (albeit slightly) from 2.76% of rent due in 2021/22 to 2.62% of rent due in 2022/23. This compares to increases in current arrears for both other RSLs (3.24%) and LAs (6.55%), resulting in a widening of the gap between GWSF and the other groups. This is particularly noteworthy given the challenging context that landlords are operating in, where tenants’ other costs have increased and the impacts of a cost of living crisis continue to be felt.

FIGURE 29: CURRENT ARREARS AS A PERCENTAGE OF RENT DUE

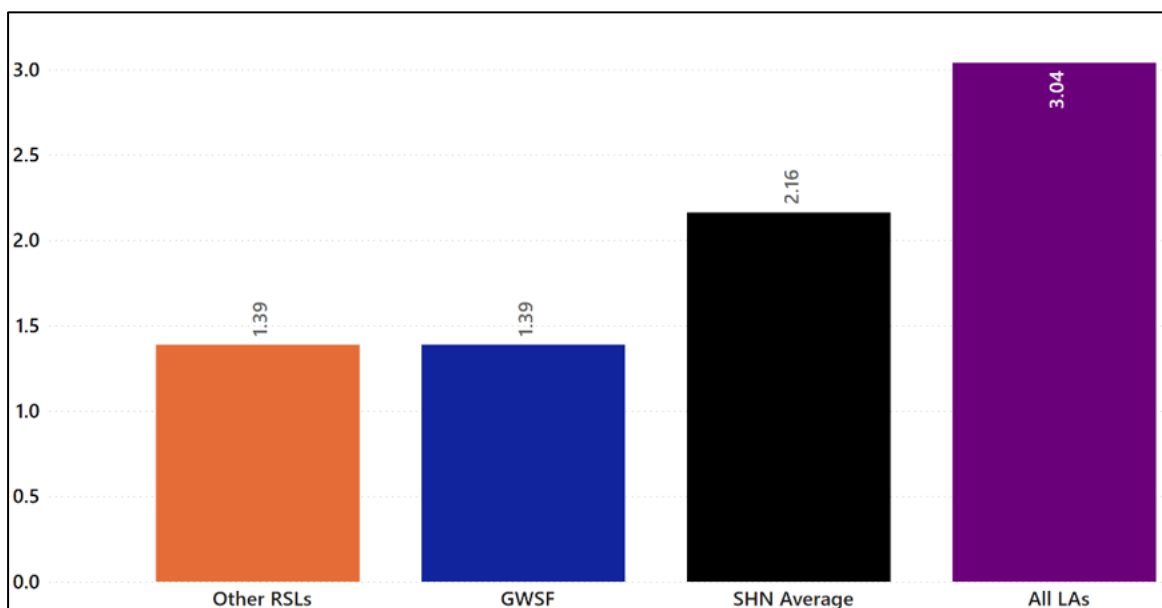


Local authorities have again seen the most significant increases in arrears this year and were starting from a position already much higher than RSL averages.

Former Tenant Arrears

With regard to Former Tenant Arrears, we can this year see similar performance when comparing the two RSL groups, at around 1.39%. Write offs in 2021/22 for GWSF landlords were again very similar to those for other RSLs (34.61% compared to 34.20%) making this more comparable than may have been the case in previous years where GWSF write offs were higher. 2022/23 again saw higher proportion of FT arrears written off by GWSF landlords, but the impact of this won't be seen until next year's data is released.

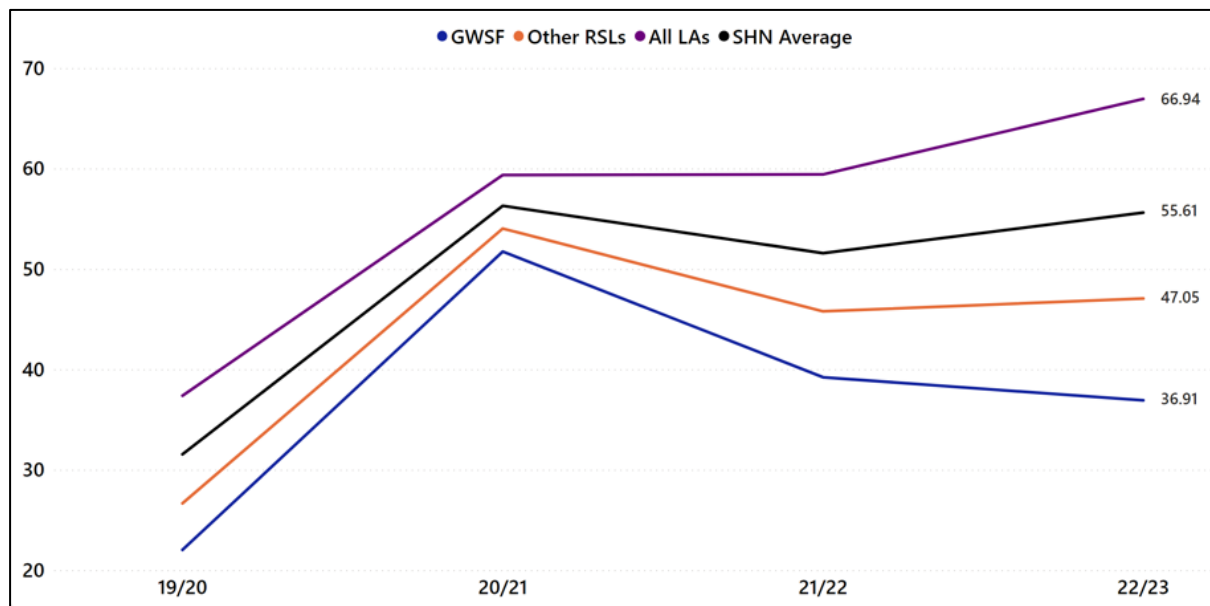
FIGURE 30: INDICATOR 27 - FORMER TENANT ARREARS AS A PERCENTAGE OF RENT DUE



Relet Times

2020/21 saw a spike in relet times across the sector, with the SHN average increasing from around 31.5 days in 2019/20 to more than 56 days. Factors included restrictions on the type of works that could be carried out during that time, the need for organisations to keep staff and contractors safe (restricting the number of people who could be in a property at any given time), prioritisation of emergency repairs, and staffing shortages.

FIGURE 31: INDICATOR 30 - AVERAGE TIME TO RE-LET PROPERTIES



2021/22 saw something of an improvement for RSLs, but average relet times remained very high compared to pre-pandemic levels. In 2022/23, the sector as a whole unfortunately saw further increases in average relet times, as landlords struggled to have works carried out timeously, often citing the following issues:

- Significant delays with utility companies addressing metering issues
- Contractors and individual tradespeople leaving the sector for more lucrative private work
- Staffing and material shortages
- Issues with properties coming back in worse condition than would have been the case in previous years
- Increasing turnover as people who would have moved in 2020/21 decided to move following the pandemic

This increase was far less pronounced for RSLs than for local authorities. While GWSF members on average saw a reduction in average relet times – from 39 days to 37 days – other RSLs actually saw an increase, from around 46 days to 47 days. For local authorities, this increase was even more pronounced, increasing from an average of 59 days last year to almost 67 days this year.

Conclusion

While 2022/23 can be seen as the first ‘recovery’ year for landlord services in the post-pandemic era, it is clear that there remain significant challenges for landlords to overcome. Satisfaction for the sector is reducing, while cost of living pressures are having a real impact on tenants. Landlords are once again in a position where they need to balance their obligations to tenants, their commitment

to meeting nationally agreed standards and the rising costs of labour and materials, against a need to ensure rents remain affordable. Difficult decisions will again need to be put to tenants for 2023/24 in order to continue to balance these priorities.

Despite this we can see that GWSF members have continued to perform well in key areas of service delivery like repairs and maintenance, rent arrears, tenancy sustainment and relet times. As with last year, some areas have been more challenging, particularly SHQS compliance. While tenant satisfaction was seen to be reducing, this is in the context of reducing satisfaction across the sector, and GWSF members continue to perform well by this measure.

We are again pleased to note that GWSF members continue to deliver good value for money for their tenants, delivering services that are tailored and responsive to local needs.