

Annual Review 2020

Contents

- 1 About Transform
- 2 Transform: tradition and renewal
- 3 Succeeding for our clients
- 4 From review to renewal
- 5 Ben's story
- 6 Louise, Ben's Keyworker
- 7 Financial overview
- 8 Focus on 2020
- 9 Liam's story
- 10 Sophie, Liam's Keyworker
- 11 Asset Management
- 12 Transform Homecare
- 13 Margaret's story
- 14 Margaret's Keyworker
- 15 Patrons and Ambassadors

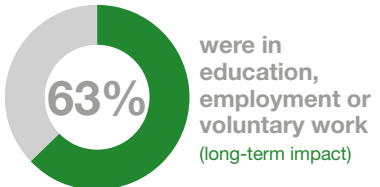
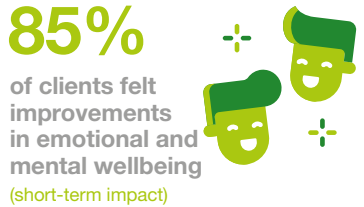
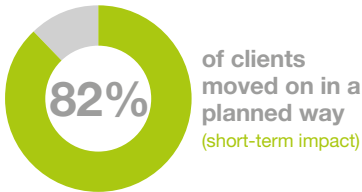
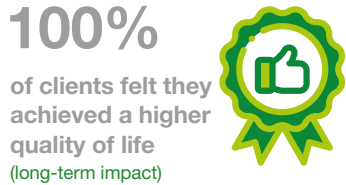
Highlights 2019/20

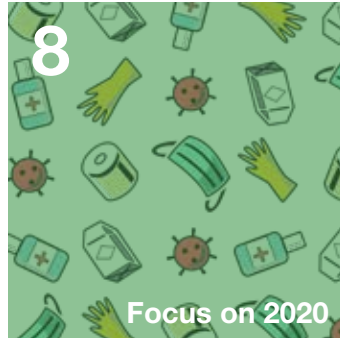
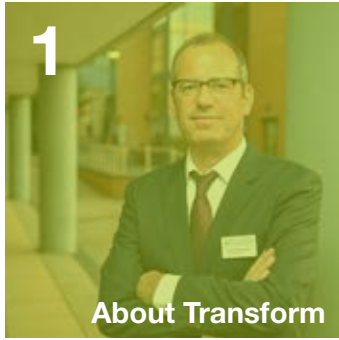


270 care clients

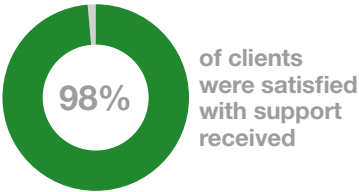
1,734 housing and support clients

Service outcomes

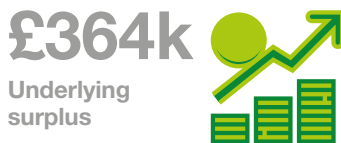
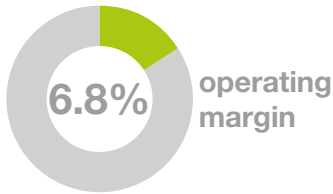




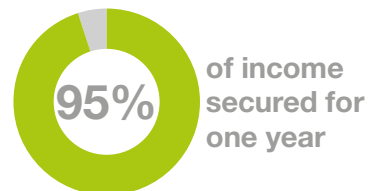
Satisfaction



Financial performance



Financial resilience





About Transform

Transform is a registered local charity and housing association providing high-quality housing, support and care services to more than 2,000 homeless and people each year in Surrey, West Sussex, Berkshire, and south-west London. Transform enables people facing a range of challenges to improve their life skills, health and wellbeing. In other words, Transform helps its clients to live independent and fulfilling lives.

Transform's current strategy, agreed by its board in 2019-20 is focused on five goals:

Operational excellence

to provide outstanding person-centred and outcomes-focused client services;

Property

to provide high-quality, safe and secure accommodation for clients;

Growth

to expand housing and support provision through diversification and developing new partnerships;

Financial viability

to enhance organisational viability and sustainability;

People

to be an excellent employer by leading, motivating, communicating and engaging with colleagues, and by investing in their welfare, training and development.

The wishes of each client are central to Transform's work, and the organisation takes close account of individual needs and preferences. In 2019-20, Transform provided personalised support to 2,004 people; 58% of whom had mental health needs, 18% learning disability needs, 14% alcohol dependency issues and 26% homeless support needs.

During the year, 1,647 clients received housing-related support services, and, of these, 181 clients (82%) moved on in a planned, positive way. Satisfaction surveys carried out in 2019 found that 100% of Transform's housing and support clients felt they had achieved a higher quality of life, while 95.8% were satisfied with the overall quality of their accommodation. When assessing Transform's care services, 97% of clients rated them as 'good' or 'outstanding'.

Transform's value-for-money (VFM) strategy is specifically designed to derive optimum benefit from its organisational resources – namely people, property, finance and reputation. In 2019 the Housing Associations' Charitable Trust made an evaluation of Transform's Wokingham service, concluding that for each £1 of support funding channelled through Transform, the positive financial impact per household was £9.97. That represents a near tenfold 'return on investment'.

96%
of clients felt more
secure since receiving
our support



Transform: tradition and renewal

Over almost five decades, Transform has built a tradition of care and compassion, but also of professionalism and accountability. Above all, Transform puts clients' needs first.

In 2019-20, the operating environment remained challenging. Public sector finances were still tight; there was uncertainty over future budgets for adult social care; Brexit continued to cause controversy, and in March 2020 the country was struck by Covid-19. Amidst all this, demand for housing and care services continued to rise, and throughout Transform firmly maintained its focus on high-quality services for its clients. Medium-term encouragement came from the government's decision to terminate its policy of rent reduction and to continue, for the next three years, with welfare funding of eligible housing costs.

In accordance with the strategy agreed in 2019-20, the financial year was a year of renewal, modernisation and growth for Transform. It brought a new emphasis on agility and fitness for the challenges of today and the demands of the coming years. Investment in teams and operational infrastructure took a variety of forms, such as new recruits in the client services and asset management functions, updated IT systems – including new software for human resources and rostering of care services – and refurbishment of the organisation's headquarters in Leatherhead.

During the year, Transform succeeded in increasing its turnover by 15% to £11.4million and secured Investment Partner Status with Homes England. In keeping with its growth strategy, it opened six new units of accommodation (in partnership with The Walton Charity and Elmbridge Borough Council) and a further four units of move-on accommodation bringing total units to 896. It also agreed a merger with Reigate Quaker Housing Association, the provider of sheltered housing for some 60 people and the owner of two development sites. The merger was completed in May 2020. Investment in properties amounted to £1.3 million – £911,000 on new properties and £386,000 on improving existing properties – including £61,000 on health and safety measures following in-depth fire safety assessments in two of Transform's sheltered housing schemes.

When the Covid-19 lockdown hit, Transform's newly installed digital infrastructure eased a rapid and seamless transition to remote working for both office-based and frontline teams. Most important of all, continuity of client services was assured, and their quality remained uncompromised. Technology played a role in this, but the prime factor was the commitment and expertise of Transform colleagues, along with their adaptability and resourcefulness. The tradition is very much alive.



“It has been an honour to chair Transform during this period of renewal, growth, challenge and investment. I look forward to seeing what the future year brings for this organisation – which has made, is making and will continue to make such a positive difference to so many people's lives.”

**Mark Austen, Chairman,
Transform Housing & Support**



Succeeding for our clients

Transform's success in serving both housing and care clients achieved formal recognition from the CQC (Care Quality Commission), the independent regulator of health and social care in England: a 'Good' rating across all services registered. Outstandingly positive feedback resulted from Transform's own surveys of its clients, while the Housing Associations' Charitable Trust (HACT) made a rigorous independent assessment of Transform's Wokingham housing-related support service.

It concluded that: "...This is an excellent service ... well-regarded by all partners. The staff are well-respected as being highly skilled and committed to supporting clients to achieve their recovery goals." When interviewed for the report, one external stakeholder described Transform as "one of the best support agencies I work with".

During 2019-20, Transform created the key role of Director of Client Services and welcomed 39 colleagues to the organisation, recruited through a newly instituted and more effective process. In line with its strategic goals, the organisation planned and delivered more than 70 training and development activities for new and existing staff, all in accordance with its established high standards.

Transform's commitment and professionalism is exemplified by the performance of the care teams during the initial weeks of the Covid-19 lockdown, around the end of the financial year 2019-20: not a single client suffered the cancellation of a visit from staff providing essential care and services. At the time of going to print, this impressive record has been maintained.

96%
of clients felt
happier since
receiving our support



From review to renewal

Loan facilities were reviewed, restructured and opened, making £7.5 million available for investment in property. In another major development, Transform achieved Investment Partner Status with Homes England, the government's 'housing accelerator'. A grant obtained from Homes England will go towards the creation of additional accommodation during 2020/21, as will investment secured from local districts and boroughs.

The central aim of Transform's asset management strategy, also reviewed in 2019-20, is to ensure clients of a home where they can feel comfortable, secure and socially included. Among recent moves to optimise current practice and pave the way for the future was the establishment of a new executive management role, Head of Asset Management and Capital Development, and, scheduled for financial year 2020-21, the appointment of a Head of Business Development.

Transform's other major asset is its staff, some 210 people. A comprehensive review of their pay and rewards, made in conjunction with sector benchmarking, confirmed that they were receiving appropriate remuneration for their experience, skills and performance. The review also concluded that Transform's staff retention compares favourably with similar organisations in the capital's housing sector.

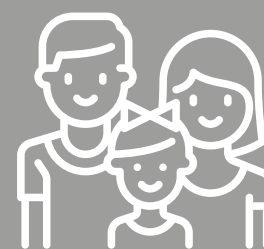
Human resources and payroll were identified as a priority in a strategic review of Transform's IT infrastructure and provision and the relevant systems were subsequently among the first to be renewed. It had been some 10 years since the organisation had made any major investment in IT – a long time in the world of technology. In 2018/19, as part of Transform's strategic commitment to providing outstanding services to a growing number of clients, the board approved a substantial project over five years to update hardware, software and working practice.

As it turned out, the new digital infrastructure rapidly proved its worth when the Covid-19 pandemic struck, and remote working became a necessity for many of Transform's colleagues. The situation highlighted the extent to which the right technology can ease operational and administrative burdens, leaving Transform's teams free to maintain their keen and consistent focus on their clients.



89%

of clients noticed an improvement in their ability to manage relationships with family and friends



Ben's story

I was working at a local supermarket and living with my nan – she'd had an operation and needed a bit of extra help, so as I was available at the time, I moved in with her. I lived there for six years – we get on like a house on fire, so this was a lovely time.

Then about a year ago I had a stroke which paralysed my right side. I was in hospital for around three months because I needed intensive physiotherapy. Obviously, this meant I couldn't work so I started getting sick pay from my job.

When I came out of hospital, I was pleased to still be living with my nan. I felt much more relaxed in my own environment and it was also great for my rehabilitation – my nan lives in a cul-de-sac so I was able to go for regular walks at my own pace without worrying too much about traffic.

Eventually my sick pay was going to come to an end, but I still wasn't able to work. That's when I was referred to Transform. Louise was my first and only keyworker who I've worked with and she's great. I'm so pleased because the help has also taken a lot of stress away from my mum.

There were a few things I knew I needed help with, and Louise was there every step of the way – any problem I had she found the solution.

My mum and I had previously tried to apply for personal independence payment (PIP) but I was only awarded the standard rate for care. I thought that was the end of it, but when I discussed it with Louise she disagreed with the assessment and asked them to review it again. When they came back with the same assessment, Louise asked the courts for a tribunal, which is the appeals process. We were waiting for a date

for that but, in the meantime, I got a call one Sunday to say they had overturned the original decision and that not only was I going to get an enhanced rate for care but I would get it for mobility as well – and they were going to backdate it!

This also helped with my other benefits, including Universal Credit.

None of this would have been possible without Louise's support.

I try to be as independent as possible. I want to do everything myself, and at the beginning Louise would always offer if she saw me struggling, but she's learnt now that I will ask if, and when, I need help. I like that she knows me so well.

"Transform has made such a massive difference to my life"

Although I was happy living with my nan, I knew it couldn't be a permanent solution, so I needed to try and find somewhere else to live. I wasn't on the waiting list for housing, so we needed some advice about that. Louise helped me fill in the application forms and submitted them for us.

She also knew about a flat that was about to become available, though. Louise told me not to get my hopes up, but someone was shown it before me and for some reason they turned it down, which was great for me. We went and viewed it with my mum and we all got a bit emotional – including Louise – I just couldn't believe it was possible for me to have my own home.

I did all the affordability stuff and passed that, then three weeks later I signed up and moved in!

I don't really think about the future, I learnt from when I was a kid to take each day as it comes, but I am looking forward to being more independent. I enjoy going to the gym, but I can only afford the travel to go once a week. I am hoping to get a bus pass, which will help, but what I would really like is my own car. Once the doctor has decided I'm fit to drive there will be no stopping me.

Transform has made such a massive difference to my life, without Louise I would still be living at my nan's place and struggling to apply for benefits.

Louise is just so lovely, she has been there the whole time, helping me to understand things and just making my life easier – I just can't say thank you enough.

If Louise weren't here, I wouldn't know what to do, but she has helped me gain the skills to do things for myself again. I wouldn't be here without her.

Louise, Ben's Keyworker

When I first met Ben, he was recovering from two strokes. He was physically weak and had problems with his short-term memory – he had to write down everything that we discussed.

Financially Ben's sick pay was coming to an end from his job and it was clear that he wasn't aware of other benefits he was entitled to.

I knew that Ben was eligible for more benefits than what he was receiving, I helped him to apply for Universal Credit and Personal Independence Payment.

When he told me about the phone call from benefits that he been awarded a back date of personal independence payments I was over the moon for him!

Ben was not registered for council housing, so I supported him to register onto the housing waiting list as a medical priority.

Our team have regular meetings with Wokingham Borough Council's housing team, which meant I was able to put Ben's case forward when their panel were allocating flats. I've also worked closely with the landlord housing officer over the years, so when this flat came up, I was able

to give her details about Ben's circumstances which I believe also helped his case.

I was very happy when Ben was offered a viewing and was accepted for the tenancy for his flat. It was a massive step in the right direction for him and once he'd moved in, I was able to support him to set up his utilities and bill payments.

Although he is already very independent, Ben's support has been focussed and centred on helping him to be as independent as possible I have noticed his confidence levels increase.

Ben is such a gentle, kind-natured and nice man and has been through so much it is great to see him settled into his flat.

It's been a pleasure to help Ben, and he has been so grateful for the support, every time we meet he says thank you to me. I know that I'm just doing my job but it's nice to feel really appreciated.

Financial overview

Transform sustained its strong financial position in 2019-20, providing confidence of long-term viability. Standing firm in the face of a challenging funding environment and Covid-19, it made significant investments while succeeding in increasing turnover by 15% to £11.4 million and in delivering an underlying surplus of £364,000, which represented a net margin of 3.2%. This was achieved despite an unexpected increase in health and safety costs and additional expenditure on IT and office reviews. Actual surplus exceeded budget and Transform achieved a respectable operating margin while commanding substantially increased borrowing capacity.

Income and expenditure account	2019/20	2018/19
	£000s	£000s
Turnover	11,448	9,920
Operating costs	(10,672)	(9,331)
Operating surplus	776	589
Surplus on disposal of housing properties		961
Net interest cost	(412)	(334)
Surplus for the year	<u>364</u>	<u>1,216</u>

Balance sheet	2019/20	2018/19
	£000s	£000s
Property assets (net book value)	46,346	45,545
Net current assets	667	762
	<u>47,013</u>	<u>46,307</u>

Loans and long-term liabilities	24,387	24,262
Reserves	22,626	22,045
Surplus for the year	<u>47,013</u>	<u>46,307</u>

Focus on 2020

Merger with Reigate Quaker Housing Association

Transform's close working relationship with the Reigate Quaker Housing Association (RQHA) goes back to January 2015, when it was first awarded a management contract for the organisation, which provides sheltered housing services to around 60 older people in Surrey and West Sussex. In April 2019, following a competitive tender process, Transform secured preferred partner status with RQHA.

A merger between the two organisations, driven by shared ethical principles and working values, was agreed in summer 2019; it was completed on 15 May 2020, when RQHA's experienced four-person housing team joined Transform.

Covid-19 pandemic

It was in March 2020, the last month of Transform's financial year 2019/20, that the implications of Covid-19 became fully apparent in the UK and the country officially went into lockdown officially on 23 March.

In keeping with best practice, Transform already had both a generic business continuity plan and a dedicated pandemic plan in place. Having made risk assessments, and following Government guidance, the organisation was able to act early, decisively and systematically, maintaining all essential services without putting unreasonable strain on its teams.

Steered by a multidisciplinary internal task force, crucial work continued, and service delivery was adapted for both supported housing and in-home care. As ever, the priority was the wellbeing, safety and health of Transform's clients. Thanks to newly installed IT infrastructure, the transition to remote working and home-working was smoothly achieved, and the teams' efficiency and productivity was maintained.

Communications to staff – which highlighted success stories as well as essential operational information – were distributed in a structured and coherent fashion.

Time and again, Transform's frontline staff demonstrated their commitment to their clients. Support for housing clients was maintained with the help of video calls, while care staff, suitably armed with protective clothing and equipment, did not miss a single client appointment.

As the world moves towards a semblance of normality in 2020/21, Transform, rooted in a strong culture and in a position to consider itself financially resilient in terms of income certainty, liquidity, borrowing capacity and reserves, will continue to adapt to circumstances in a logical, agile and resourceful way. 2019/20 had been planned as a year of renewal and change for the organisation, and the impact of Covid-19 accelerated several developments that were already underway.

In responding to the crisis and its consequences, Transform provided further compelling evidence of its devotion to serving its clients, its capacities for overcoming adversity, and its readiness to face the future.



Liam's story

My mum brought my siblings and me up as a single parent. We did a lot of moving around which was quite hard because I couldn't settle down anywhere. My childhood was good but when I got to my teens I was hanging out with the wrong people and started doing drugs.

I had been with my partner for around five years when we found out she was pregnant; we had moved into my mum's but when my son was born there wasn't enough room, so we had to find somewhere else to live.

We started off in a hostel but eventually the council found us a flat. When we went to sign the tenancy agreement, I noticed my name wasn't on the paperwork and I was told it was to protect female partners. I was hurt that my partner didn't fight for me to be added and I think it shifted the power in our relationship. We were no longer equals and when the police were called following an argument, I was kicked out because I wasn't on the tenancy.

I ended up living in my car, but I was working in an office at the time, so the council couldn't help me with accommodation. Eventually I lost that job because it was impossible to get ready in a car when I needed to wear a suit.

I decided to try and get some help and wound up in a hostel somewhere which is where I think I really went downhill. I was surrounded by drug addicts and because I already had a drug habit, it just exploded. I was in a bad place emotionally; I was suicidal and tried to overdose. I was doing all sorts of things that I shouldn't have been doing. I met drug dealers and started dealing. Obviously in the end I was arrested and went to prison for nine months.

Prison helped a lot because I couldn't get hold of any drugs, so I managed to kick my habit, but when I came out, I was a bit lost and nervous. I wanted to celebrate but because I wasn't doing drugs anymore, my friends weren't interested in seeing me – I think if I'd gone to the pub I would have gone straight back to my old ways. But I spoke to the Probation people (KSSCRC) and they put me in touch with Transform.

I was interviewed by Transform staff and they were great – I felt really welcome. The whole process was very quick which was helpful because if you're sitting around waiting for help and it's delayed it is easy to fall off the wagon when you're so close to the edge.

"Transform has literally turned my life around..."

I had to basically start my life all over again – my benefits, my driving licence, they were all gone. It was so scary and the hardest part about doing everything right is things come so slowly.

When I arrived at the house, I was shocked at how nice the place was. I made a few changes to the living room and now it really feels like a home, somewhere you can settle down and start rebuilding your life.

The support I receive from Sophie is unreal. In the beginning I didn't think I needed help with anything, but I'm so glad she persisted. It's unlike anything I've had before. If I ever need her at all, she's always on the end of the phone. She literally supports me with everything. There might be some activities that I could do myself

but having her there to remind me of things that might be crucial is just brilliant.

Sophie has helped me in so many ways, but the biggest thing was mediation with my ex. She hasn't let me see my son since I came out of prison and it's been really hard for me. It took a while for Sophie to persuade me to do mediation but I'm so glad we did – I wouldn't have been able to do it without her.

I've made a lot of progress since being with Transform. I've stopped doing drugs, I'm working on improving my mental health now because Sophie helps with getting my appointments sorted and reminding me to do certain things. So, I feel like I'm nearly back on top again, it hasn't been easy. Obviously, there's still progress I want to make in my life, but I'm in a much healthier place. That's only because of Transform really. If it wasn't for this place, I'd be...I don't know where I'd be right now to be perfectly honest. Somewhere not good, I know that much.

Sophie recognised that I have a love for art and tattoos. It's something I would love to do as a job and I've always wanted a desk where I can sit down and do my artwork. I would never normally ask for something like that because you assume you couldn't get it, but Sophie asked if it would be possible for Transform to help me get a desk and now, thanks to a client grant, I have a lovely desk in my room where I do all my artwork. It has made a huge difference.

Transform has literally turned my life around and made it worth living again – you can't really top that. There's nothing I can really say that would really do justice for how much they've helped me.

Sophie, Liam's Keyworker

Liam was in prison for selling drugs. When he left, he moved back in with his partner at the time. It didn't work out, so she asked him to leave and he ended up sleeping on his mum's sofa.

He was using drugs before he went into prison so when he came out and came to Transform it really was like a clean slate in a way, he stopped using and had his own accommodation. He was quite nervous to start with, he'd never lived in shared accommodation before and obviously never met the other clients, but he was very grateful and was very eager to get started. The issue was he was always thinking ten steps ahead rather than in the now – asking about rent and college and work and then where he would go after Transform. It was all a bit much, so we had to really slow him down.

He didn't feel like he needed the support that we were offering but when we sat down together and discussed the issues he was facing, he agreed that having someone to support him through things would be great. He has changed a lot in a short space of time, he's now realised that he can't do it all on his own.

He also has help from the Epsom Voluntary Centre and the JobCentre, so they talk to him about jobs and other activities which allows me to focus on other things including his benefits and his mental and physical health, it's good to have that balance.

Currently we are also focusing on mediation with his ex-partner. He has a son with her, and she's been quite difficult about allowing Liam to see him, so we've done a lot of work on that.

I knew about mediation because my colleague worked with a client

who was going through it. When I suggested it to Liam, he was a bit reluctant at first. But I noticed that in almost every session he talked about not being able to see his son. So, in the end I was quite firm with him and told him that he needed to take some responsibility and give me the go ahead to start proceedings for mediation. It took some persuading, but he agreed and now he's so happy we did it.

He's really good at drawing and I think that's how he lets his anger out sometimes. He has an ongoing issue with his back and so it was clear he needed a dedicated space where he could be comfortable. So, I asked my manager and she agreed that we could apply for a grant for him to get a desk and chair. He was so incredibly grateful. I was also able to secure a grant so I could take him clothes shopping. He normally wears tracksuits so I was conscious that if he did need to go for interviews, or to court, he would need something that looked smart.

Since I first started working with Liam he has grown in confidence. Now if he needs help with something, he doesn't hesitate to ask.

He is keen to get back to work but because of the issues with his back he needs to take that into consideration. I think he realises that there's a lot going on right now and that work isn't going to be the best thing for him. There are still things that he needs to sort out before he's really ready to get back into employment.

Transform hosted a visit from the probation service recently where they met a few of the clients including Liam. He was really honest and open about his journey and they really

appreciated hearing from someone who acknowledged that they'd messed up, but who was doing all they could to change.

From where he was in the beginning to where he is now, he is so much more positive! And hopefully when he gets a court date and things go in his favour and he gets to see his son, he will be ecstatic – it will be the best news he's had for ages.

2020 update

Liam started full-time working in May 2020. He was able to work all the way through the pandemic, and although he struggled in the beginning to manage his new routine, he has finally found a happy balance. Full-time employment has benefited Liam in many ways, not only financially but he has also seen an increase in his self-confidence and sense of purpose.

We continue to support Liam and he reaches out if and when he needs additional support. Unfortunately, we've made no progress to secure official contact with his son as the paperwork appears to have been mis-placed. However, we've agreed between us that we need to submit a new application and start again. Although this is frustrating, on a positive note his ex-partner has allowed him to see his son on a casual basis which has made Liam extremely happy!

Asset management

Transform enjoys a reputation for consistently providing high-quality housing for homeless and vulnerable people. The focus of its asset management strategy is on providing clients with a home where they can feel comfortable, secure and socially included.

On a day-to-day basis, asset management is about ensuring that housing stock is structurally sound, suitably equipped, well maintained and compliant with health and safety legislation. It also covers longer-term planning for the purchase, development, and refurbishment of properties and for their financial viability. Transform's asset management strategy was reviewed and refreshed in 2019-20, and its importance affirmed with the creation of two senior roles: Head of Asset Management & Capital Development and Head of Business Development (active as of October 2020).

In 2019-20 £1.3 million was invested in Transform's housing stock – £683,000 on two new properties (accommodating a total of four people), £228,000 on development in progress, and £386,000 on improvements to existing homes. In addition, a number of further properties came under Transform's management. Located in Addlestone, Dorking, Farnham, Leatherhead and Redhill, they offer a total of some 20 bed spaces, designated primarily for single homeless people.

100%

of clients said support received helped them to maintain settled accommodation since leaving Transform



Transform Homecare

Care services have only formed part of Transform's activities since 2016, when it merged with the Cherchefelle Housing Association and took on its care responsibilities. In the course of 2019/20, Transform supplied care services to 270 people in their own homes, working to enable people to enjoy a good quality of life, living independently and with dignity. A survey in September 2019 found that 99% of clients were satisfied with the care they received.

In its 2019 Annual Review, Transform explained that public funding for care services had been challenging for a number of years, and that costs for providing the service were higher than the income it received.

In keeping with its responsible approach, Transform commits to sustainability in all its activities, and in Autumn 2019 it took the difficult, but forward-thinking decision to withdraw from its contract for a number of state-funded care services. In a highly challenging environment, the rates that the local authorities were able to offer were no longer proving viable, not least in the face of inflationary pressure.

Transform has been focusing this year on self-funding clients for care services. Happily, a substantial number of state-funded clients chose to continue to receive care from Transform by 'topping up' the difference between the sum paid by their local authority and the full private fee.

The planning and management of Transform's care services was further enhanced by the implementation of CarePlanner software, part of the organisation's strategic investment in IT in 2019/20.



97%
of clients rated
Transform Homecare
as either 'good' or
'outstanding'





Margaret's story

I grew up with my parents and my sister in the house that I live in now. When my parents died, we inherited the tenancy, I really enjoy living there. I also live with my sister who has learning difficulties too. We live independently but we have carers who come and help us.

I was receiving benefits, but these changed to Universal Credit. Then they just stopped – and I didn't know why. Because of my learning difficulties I struggle to understand things like paperwork and telephone conversations. I needed some help, so I contacted Transform.

When I knew someone from Transform was coming to my house, I was a bit anxious. But my keyworker was really friendly and just went through a support plan with me. We discussed what help I wanted, and then decided what we needed to do first and how we were going to do it.

My keyworker has helped me a lot with so many things; she even got me a washing machine! When I first met her, I didn't have one, I had to go to the laundrette to do washing but because public transport is very limited where I am, I really struggled. So, my keyworker helped me get a grant for a washing machine – I was so pleased. The first time the carers used it the washing came out smelling lovely – I wasn't used to it!

An organisation called Optalis was helping me find a job. I had a Job Coach which was funded through the JobCentre, but it was only funded for six months. When it was coming to an end and I didn't have a job, my job coach and my keyworker worked together to liaise with adult social services at Wokingham

Borough Council to try and get the funding continued and they were successful.

They also felt that I would be entitled to another benefit called PIP. My keyworker helped me apply and even came to the meetings with me because I find them difficult. At first, they turned me down but after an appeal they finally agreed, and I even got it backdated. She did a really good job.

At one point I kept receiving these letters which I didn't understand so I'd just bin them. But when I showed one of them to my keyworker, she realised they were real letters about a pension I was entitled to. She's now helping me claim that as well! She's not allowed to give me advice on it though, so she took me to Pension Wise. They explained everything to me but it wasn't very clear so my keyworker put the information together in a way that I could understand it and I was able to choose what I wanted to do with it by myself. She made it much easier – I don't know how I'd manage without her.

I feel really happy at the moment because I know that if I've got any problems, I can just ring her. In fact, I've got something else that I need to discuss with her now, I need to fill in a form but I know I'm going to struggle to understand it so I will need her help. She's great – she's always there when I need her.

"She's great – she's always there when I need her." **Margaret**

Margaret's Keyworker

Margaret was quite shy when I first met her but very direct when it came to what she needed help with.

I started getting involved when there was a disruption with her benefits. There had been an issue and her benefits stopped coming in, so I worked with her to sort them out. Once that was all sorted, I thought my job was done but her support with Optalis came to an end which I knew was going to be an issue.

Because of Margaret's learning difficulty she needed quite a bit of help – with different assessments, using the computer, filling in paperwork and completing the journal necessary for her to receive Universal Credit. So, without any support, I knew the benefits would stop again which would have a knock-on effect elsewhere.

I have been to assessments with her where the application has been rejected even though the person carrying out the assessment struggled to communicate with her and looked to me for clarification. The good thing was that because I was there, I knew exactly what was said and I was successfully able to appeal the decision on her behalf. It was a real stand-out moment for her and me, she's had to fight for everything her whole life, but when she found out the appeal had been successful, she was straight on the phone to me – she was so excited! I asked her what she was going to do with the money, and she said 'nothing, I'm just going to keep hold of it!' because it's money she's never had before.

Margaret managed for a long time on her own, she's happy to make her own phone calls, but sometimes people speak to her in a way that she just doesn't understand. If it is a simple piece of paperwork like her bank statement, she will be able to read it but then when she got a letter about her pension, she struggled to understand it. She thought it was spam, but it turned out they wanted to give her money!

Help with her pension is probably a job for Citizens Advice Bureau but knowing Margaret and knowing the additional support she would need – like having things explained to her and attending meetings – I knew that it was something I needed to take on.

She was given five options. So I spent a good hour sat at my desk thinking about how each option would affect her, what changes would happen and how best to explain each of them to her so that she could understand them well enough to say 'that's the option for me'. Margaret has now made her decision and she's just been to sign the paperwork.

I think Margaret is quite happy just chugging along the way she is. She will keep doing what she's doing and make sure she doesn't affect her benefits, and she will be fine because she knows there is help available if she needs us again in the future.



"Margaret is quite happy just chugging along the way she is... she knows there is help available if she needs us again in the future." **Margaret's keyworker**



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98%
of clients were
satisfied with the help
received with health
and support needs



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The Directors of Transform are simultaneously Trustees of the charity. At the end of the financial year 2019/20, there were 10 Trustees on Transform's Board.

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Adele Duncan

Director of Client Services (appointed March 2020)

Michael O'Brien FCABE

Director of Asset Management & Capital Development

Simone Bartley

Director of People (appointed April 2019)

Anita Gupta

Head of External Affairs & Communications (appointed March 2020)

Caroline Felton

PA to Chief Executive

Carol Borwick

Head of Fundraising & Communications (left February 2020)

Andrea Cannon BA FCIH

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Marisa Elliott

Head of Human Resources (retired in May 2019)

Advisors:

External auditors: Nexia Smith & Williamson
Bankers: Barclays Bank PLC
Internal auditors: TIAA Ltd
Solicitors: Devonshires

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