

▲ ▲ ▲ National Federation of ALMOs
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Firm Foundations

2017 Annual Survey – Summary Findings



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The NFA would like to thank all the staff at ALMOs who completed the survey. This has enabled us to provide a summary of the scope and nature of work being undertaken by the ALMO sector. The analysis is based on ALMO self-reporting, and whilst we take every effort to ensure the accuracy of the figures, the NFA cannot take responsibility for any errors in the data.

Introduction

Arms' length management organisations (ALMOs) are housing companies which are 100% owned by their parent local authorities. They were established to enable local authorities to separate out their housing services, and therefore deliver better services and value for money. ALMOs put tenants at the heart of what they do, with nearly a third of boards represented by tenant board members (with the remaining board members councillors and independents). They deliver core housing services alongside a range of other services which meet their social objectives and the objectives of their parent local authority. As at December 2017, there were 34 ALMOs managing nearly 460,000 properties across England.

As the results of this survey show, ALMOs have continued to work effectively alongside their parent local authorities to build new homes, support tenants and build stronger communities. Although 2017 was a year of continuing uncertainty in the social housing sector, ALMOs have built more properties this year than last year, and have plans to build nearly 8,000 homes over the next five years. We welcome the Government's announcement that the LHA cap will not be implemented into supported housing, that there will be a return to rent increases of CPI +1% from 2020, and that the borrowing cap will be raised in 'areas of high affordability pressures'. These announcements, all in areas which the NFA has been lobbying on, should provide our members with a more stable environment to develop long-term business plans. However, there are still challenges to the sector, with uncertainty over the High Value Assets levy and continuing challenges around Right to Buy, which are making it difficult for ALMOs to reach their potential and support the Government to deliver the new homes that the country needs.

In this year's survey, we also gathered views about the Homelessness Reduction Act (HR Act) which comes into force this year. A significant percentage of our members have been involved in preparations for the act. Although welcoming of the overall aims, our members have concerns about the implementation of the act due to insufficient funding and challenges on the level of housing stock available. Increased funding to implement the act alongside more genuinely affordable housing stock as well as dovetailed homelessness and welfare reform policies will make it more likely that the HR Act is a success.

Since their inception, ALMOs have proven to be fleet of foot, innovative, and able to find more ways of providing the same services for less; and for this reason, local authorities often have ALMOs as their partners of choice in delivering a range of services, such as care and support services, homelessness reduction, and financial advice. A number of ALMOs are also playing a role in improving standards of management and maintenance in the private rented sector as well as on behalf of other social landlords. ALMOs and their local authorities have also established a range of housing companies to deliver development and services, with nearly two thirds of these companies dedicated to development.

Key Statistics

- The ALMO sector manages just under a third of local authority housing in England (29%), and as at December 2017 was responsible for a total of **457,387 properties** across 37 local authority areas.¹
- Out of 34 ALMOs, 35% (12) manage nearly **2,500** properties on behalf of other social landlords or housing associations. 41% (14) also manage nearly **2,000** properties for the private rented sector.
- The sector built or acquired a total of **1,417** properties in 2017. This compares with 1,136 properties in 2016 (a 25% increase) despite there being fewer ALMOs.
- In addition to this, ALMOs have plans to deliver an additional 2,749 properties of varied tenure in the next 12 months.
- Over the next five years, ALMOs plan to deliver at least **7,846 homes**. This is broadly similar to numbers reported for these ALMOs last year. As the survey took place in December 2017, this figure does not take into consideration the additional homes which could be built through the Government's plans to raise the borrowing caps in high affordability areas, or the longer-term positive impact of more policy stability (i.e. removing capped LHA rates and returning to CPI+1%); so it is actually likely that this figure will increase as ALMOs review business plans. However, having said that, there is still continuing uncertainty around the introduction of the High Value Assets Levy and difficulties with Right to Buy replacements, which is making it challenging for ALMOs to fully reach their potential.
- ALMOs continue to invest in their future workforce, with around 300 apprentices employed in the sector.
- Alongside their core housing management functions, many ALMOs support their parent local authorities with a range of services. **Half of ALMOs** provide care and support services on behalf of their local authority or as a market product; and **80%** help their council to implement the homelessness prevention strategy.
- **44%** of ALMOs or their local authorities have housing companies; between them they have 23 companies for development, commercial activities, working in the private rented sector or with homelessness, and providing support services.
- ALMOs continue to have a strong commitment to tenant engagement with ALMOs at the heart of governance arrangements. **Just under a third** of ALMO boards are represented by residents/tenants, with councillors and independents comprising approximately a third each.



Nottingham City Homes, Cranwell Bungalows, a development of 11 bungalows

¹ The most recent statistics available – Ministry for Housing, Communities & Local Government, Local Authority Housing statistics (April 2017) – state there are 1.60 million council dwellings in England.

PART ONE: Stock Management

In December 2017, the ALMO sector consisted of 34 ALMOs which managed a total of **457,387** properties; of these, **453,084** were Council/ALMO owned stock.²

Since we last reported, three ALMOs have been disbanded: Wigan & Leigh Homes Ltd., Brent Housing Partnership, Welwyn Hatfield Community Housing Trust; and Kensington & Chelsea TMO is no longer managing the council's homes.

Numbers of properties managed by region

Region	Number of ALMOs	Total Stock Managed
North	10	168,681
Midlands	9	114,644
South West	4	25,443
London & Southern	11	148,619
TOTAL	34	457,387

Council property nature and ownership

	Number of properties
Council owned general needs (inc. age designated stock)	372,737
Council owned supported housing	20,020
Council owned leasehold	54,949
ALMO owned general needs (inc. age designated stock)	797
ALMO owned supported housing	40
ALMO owned leasehold	402
ALMO owned shared ownership	121
OTHER ³	4,018
Total stock	453,084

Since 2014, approximately 84% of stock has been council owned general needs, and this has not changed noticeably this year (82%). As reported last year, there has been a small but steady increase in the percentage of council owned supported housing properties over the last four years from 3.5% in 2014 to 4.4% in 2017.

In addition, **12 out of 34 ALMOs** (35%) managed **2,464** properties on behalf of other social landlords or housing associations, with 89% of these being managed by just five ALMOs. This is a slight increase on last year, when these 12 ALMOs managed 2,213 properties.

14 ALMOs (41%) also managed stock of **1,839** properties for the private rented sector, although just over half of these were managed by one ALMO. These ALMOs deliver housing management services (43%) and/or repairs and maintenance services (37%), and/or Lettings & Allocations Services (33%). The numbers have barely changed from last year when these 14 ALMOs managed 1,858 properties in the private rented sector.

² Kensington & Chelsea TMO were not surveyed due to their circumstances, and we have included their headline figures from the last survey (2016). We have also used the 2016 stock figures for one ALMO which did not complete the 2017 return. The number of properties includes Council and ALMO owned, those managed on behalf of social and private landlords, and commercial properties. It does not include garages.

³ Includes a small amount of council owned shared ownership, gypsy and traveller sites, private lets, temporary and homeless accommodation, dwellings leased under the empty homes initiative, freehold properties.

FIRM FOUNDATIONS

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21 ALMOs (66%) have a direct labour organisation (DLO) which is an increase of three from last year.

Two ALMOs (6%) have a separate repairs subsidiary or company.

Eight ALMOs are Registered Providers with the HCA, and **14 ALMOs** or their local authorities (44%) have other housing companies for development or housing needs, which is two higher than last year.

Services provided

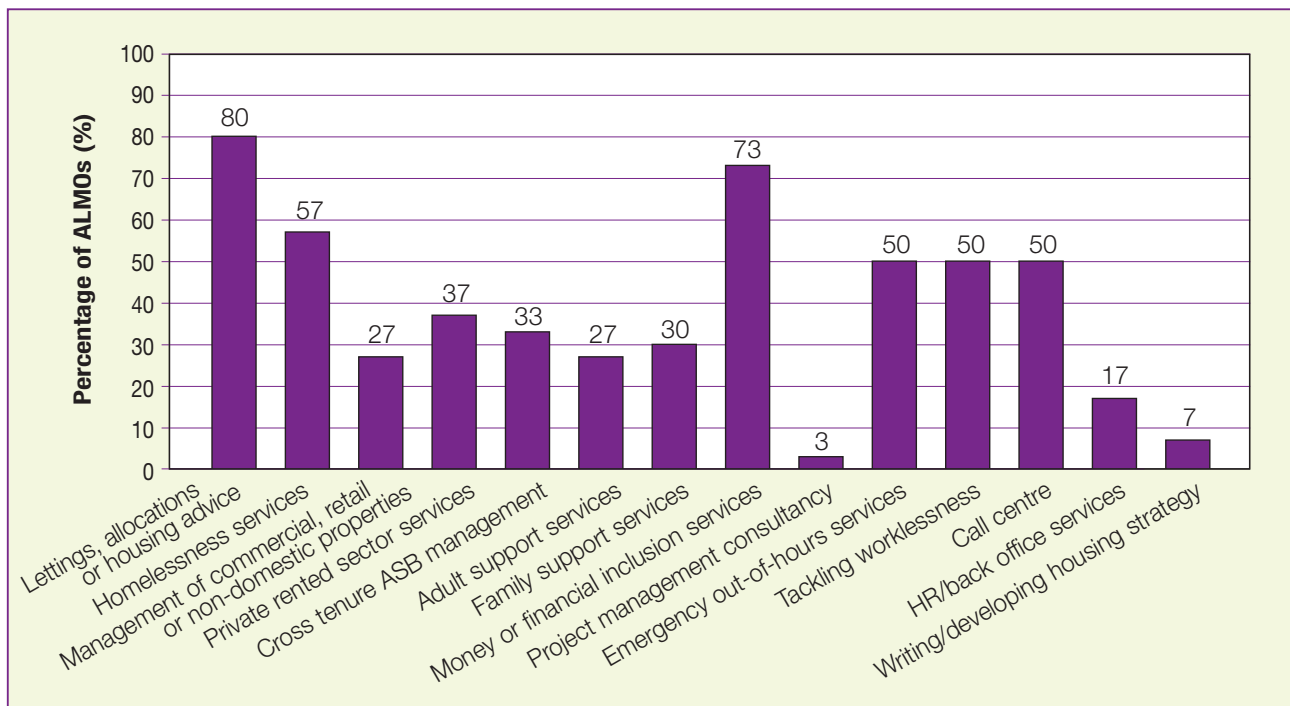
ALMOs deliver a diverse range of services alongside the core housing management function, utilising their expertise to support their parent local authorities to deliver services and improve communities. The type and level of services has not changed significantly since last year.

Management of non-domestic properties

Of the 32 ALMOs who responded to this question, **12 ALMOs** (38%) provide management or maintenance services for non-domestic properties, including educational establishments (eight ALMOs) and/or commercial and retail units (four ALMOs). Six ALMOs deliver services for a range of other public and council owned buildings.

Additional services

The majority deliver services, in addition to housing management, on behalf of their local authority, with the biggest percentages delivering lettings, allocations or housing advice, and money or financial inclusion services:



(Results for the 30 ALMOs who responded to this question)

Care and Support Services

50% of ALMOs (15 out of 30) deliver care and support services, which is a similar percentage to last year; of these, Eight ALMOs just provide care and support services on behalf of the local authority (27%). Six ALMOs (20%) provide care and support services as a market product, while two ALMOs deliver services on behalf of other local authorities, a decline from last year.

Housing offer for older people

ALMOs continue to provide specialist housing and support for older residents in the form of:

- **Sheltered schemes (83%) and extra care schemes (40%)**
- **Welfare benefits/pensions advice (80%)**
- **Home adaptations (77%)**
- **Signposting for social care and health services (70%)**
- **Community alarm services (57%)**
- **General needs floating support services (43%)**
- **Community hubs (27%)**
- **Provision of mobility products (13%)**
- * **Priority services (eg quicker repairs) (17%)**
- **Hospital discharge services (23%)**
- **Telecare (20%)**

Services to generate additional income

In addition to the above, two thirds of ALMOs deliver services in the wider market place as a means of generating additional income for the ALMO. This includes 10 ALMOs which deliver a repairs & maintenance service; three which deliver development or asset management services; four which deliver an estates or grounds maintenance service; and seven which deliver care and support services into private homes. Other services provided include community alarms, security and cleaning services, surveying and providing specifications for private sector DFGs, floating support services, adaptations and handyperson services.

Housing companies

14 out of 32 ALMOs or their local authorities (44%) have separate housing companies. Between them, they have 23 housing companies with a range of functions: 15 of the 23 (65%) are for development, one provides homelessness services, two work in the private rented sector, three are commercial companies, one provides support services and one is a joint venture.

Apprentices

ALMOs continue to invest in the future workforce, with 27 ALMOs (out of 31 who responded) employing apprentices (87%). This is an increase from last year, when 24 ALMOs had apprentices. There are about 300 apprentices in the sector; of these:

- **36%** are employed in repairs & maintenance roles
- **25%** are employed in trades roles (e.g. plumber, electrician)
- **23%** are employed in corporate services roles
- The majority of the remaining **16%** are employed in asset management, housing management, gardening & grounds maintenance roles

Governance and Board

The majority of ALMOs still have tenant board members to ensure that tenants remain at the heart of the organisation's work (31 out of 32). Across all board members in the 32 ALMOs, 32% are tenant board members, 36% independents and 29% council (with the remaining 4% mostly ALMO staff members). In the case of Your Homes Newcastle, they have recently moved away from this split to a new governance model which uses a skills-based recruitment process (see box).

Following an extensive consultation process across the city, Your Homes Newcastle and Newcastle City Council has reviewed the ALMO governance model. They have reduced the Board from 19 members to 12, with four Council representatives and eight Independents. Selection to the Board is undertaken using a skills-based role profile. Tenants can apply for an Independent place, and currently one Board Member is also a tenant. At the same time, a Customer Services Committee has been established consisting entirely of tenants which reports into the board. The Customer Services Committee carries out monitoring, scrutiny and oversight of the housing management services for the organisation.

The majority of ALMOs have an Independent Board Chair (23 ALMOs); three ALMOs have a Tenant Board Chair; four cases have a Councillor as the Chair; and in two cases, the Chair is an Independent Council appointment. The average size of an ALMO board is 12.

Out of 30 ALMOs who responded to the question, just over half (16) remunerate their Chair and some or all of their board members; an additional three remunerate just the Chair. Of those who currently do not pay remuneration, three are considering doing so in the future.

Tenancy fraud

ALMOs undertake a considerable amount of work to ensure that social housing stock is effectively used for the good of the communities where they operate.

20 out of 30 ALMOs who responded to this year's survey questions on tenancy fraud operate their own tenancy fraud strategy.⁴ These include a range of measures:

- Participating in the National Fraud Initiative and encouraging tenants to report suspected fraud;
- Tenancy audits;
- Dedicated fraud officers;
- Working with the managing council's tenancy fraud strategy, and with the council's fraud and benefits teams;
- A risk-based approach to tenancy management, for example checking tenants who have not been in contact or who have irregular energy consumption;
- Monitoring tenancy charge or rent overpayments
- Checks on Right to Buy and sub-letting.

Half of the ALMOs who responded undertake a tenancy audit either annually or at a defined timescale, or on an ad-hoc basis. Other ALMOs undertake intelligence-led monitoring. For example, Lewisham Homes and Newark & Sherwood Homes report intelligence-led audit programmes. Newark & Sherwood Homes considers neighbours' reports, under-use of the repairs service and non-access for gas servicing. CityWest Homes routinely runs reports against indicators, for example, showing high credits on rent accounts and where no repairs have been reported for long periods.

A number of ALMOs absorbed the costs of the fraud activities within their business as usual. For those who could provide a value on the cost, ALMOs spend a mean average of £6.52 per property managed on tenancy fraud activities (mode average: £4.80).

PART TWO: Finance and Development

Management of the Housing Revenue Account (HRA)

The HRA is managed in **18** cases by the council, **seven** cases by the ALMO, and **six** cases in joint arrangement. This is similar to last year, except in two cases where the council has taken over management from a joint arrangement, two cases where there has been a move to a joint arrangement from council management, and one case where there has been a move to ALMO management from a joint arrangement.

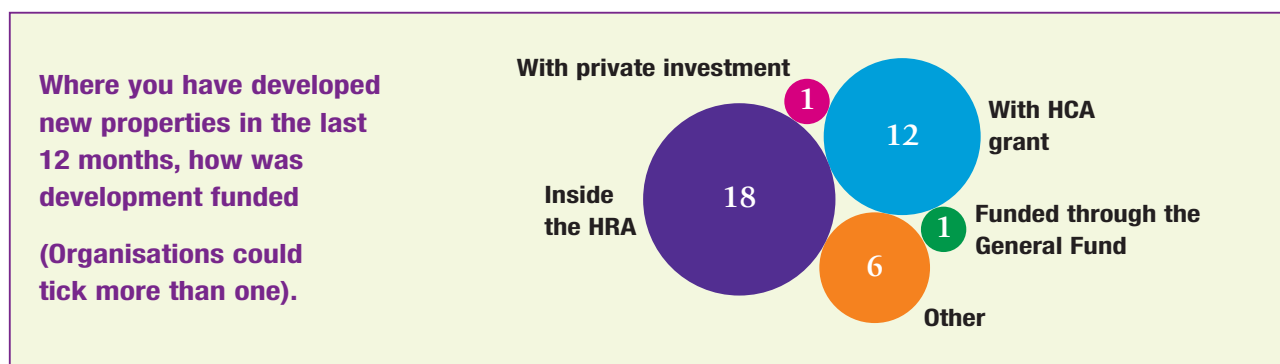
Property development (2017)

ALMOs built or acquired a total of **1,417 properties** in 2017. This compares with 1,136 properties in 2016 (a 25% increase).

- **892** properties were new build, a 15% increase on the year before despite there being fewer ALMOs. 59% of these were completed by just three ALMOs. 739 of the total new build properties are HRA owned and ALMO managed (83%), with 130 ALMO owned (14.6%).
- **523** properties were acquired, a 45% increase on last year; and an additional two properties were developed in partnership with another organisation. Of those which were acquired, 28% were acquired by the ALMO, 48% were acquired by the HRA and 16% were acquired by the local authority General Fund. However, it should be noted that the majority of ALMOs reported acquisitions through the HRA (23 ALMOs) while only four acquired for the ALMO and two through the local authority General Fund.

The majority of new build and acquired properties are for affordable rents, with a similar percentage as last year (60% v. 61%). There has been a decline of 13% in the numbers of properties built or acquired for social rent, which is offset by an increase in shared ownership (from 2%) and market rent (from 2%). However, this is affected by the chosen tenure profile of the main three developers and may not represent a trend across the sector.

TENURE	Number (2017)	Percentage	Number (2016)	Percentage
Social rent	276	20%	378	33%
Affordable rent	856	60%	695	61%
Market rent	101	7%	22	2%
Shared ownership	112	8%	27	2%
Outright sale	11	1%	6	1%
Other	61	4%	8	1%
TOTAL	1,417	100%	1,136	100%



⁵ Please note, the results for this section do not include Kensington & Chelsea TMO; or A1 Housing. They cover 32 ALMOs, or slightly fewer where ALMOs did not respond to the specific questions.

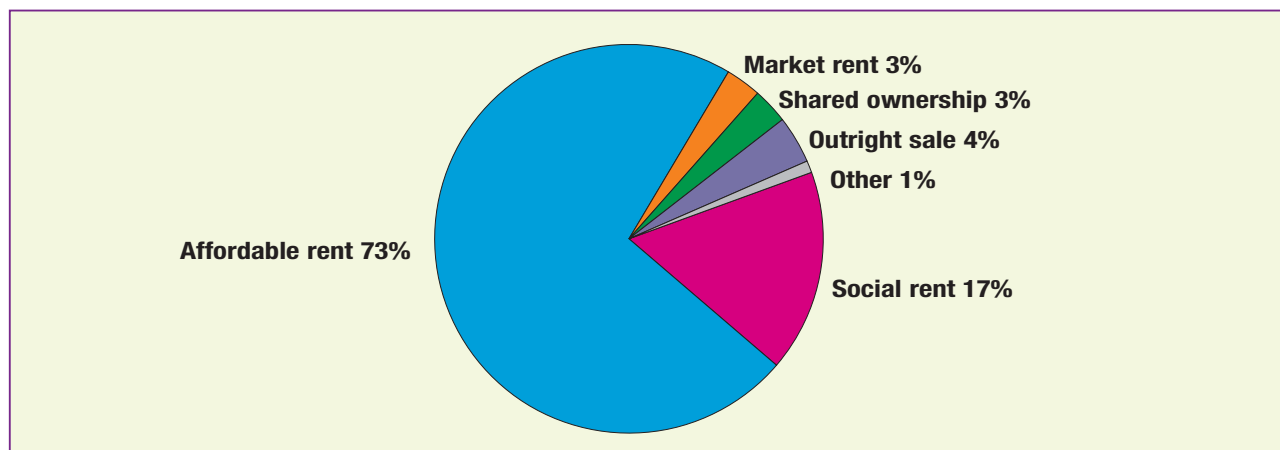
Future plans

In the next 12 months, 27 ALMOs plan to develop or acquire at least 2,749 properties

ALMOs have a considerable new build development programme in place for the next 12 months, with 25 ALMOs developing an anticipated 2,073 properties. Of these, six ALMOs have plans to develop over 100 properties each.

Ownership	Number	Percentage of total
ALMO owned	935	45%
HRA owned	1,101	53%
Local authority General Fund owned	37	2%
TOTAL	2,073	

Where ALMOs could provide the tenure breakdown, nearly three quarters of properties are being developed for affordable rent:



In addition, 20 ALMOs are planning to acquire at least 676 properties within the next 12 months.

In the next five years, ALMOs have plans to develop at least 7,846 homes.

Although this is lower than last year's reported figure (8,894 homes) this is to do with the overall decline in ALMOs from 2016 to 2017⁶ rather than changes to development plans. Clearly the sector is continuing to maintain development pipelines in challenging circumstances.

Where ALMOs can provide the tenure breakdown, it is anticipated that 20% will be for social rent (compared with 19% last year), 56% will be for affordable rent (compared with 49% last year) with shared ownership, market rent and outright sale accounting for the remaining 24%.

22 ALMOs will be developing inside the HRA, five ALMOs through the General Fund; and the majority (17) will be using HCA grant. Three ALMOs are developing in partnership with another social landlord and three ALMOs are using additional private investment.

⁶ For those ALMOs who provided figures in 2016 and 2017, there is actually an additional 320 homes in the development pipeline.

PART THREE: Policy Environment

There were welcome Government announcements over the latter part of 2017: the return to CPI +1% rent settlement, the removal of the threat of the LHA Cap to social housing, and the plan to lift the HRA cap in certain areas. Although these have not yet had time to filter through into concrete results, nearly half of ALMOs expect to see positive changes to their business plans as a result of a more stable policy environment or were already re-working their business plans to allow the development of more housing. However, there were still concerns about the impact of the rollout of Universal Credit on rent revenue and the continuing impact of the HRA borrowing cap on new development; and the Right to Buy on current stock.

The survey was undertaken just after the Government's announcement that it would be making funding available to lift the HRA Borrowing Cap in certain areas of high affordability pressures. Already in December 2017, ten ALMOs stated that they would be putting in funding bids; **six of these had modelled that the additional funding could potentially deliver at least 2,613 homes.** Six ALMOs would not be putting in a bid, either because this was a council responsibility (three), because there was remaining headroom (two) or because it was not a high demand area (one). The majority of the remaining ALMOs were yet to decide, in part because of the timing of the survey, but also because the Government has not announced its definitions of high affordability pressure or criteria for bidding, and certain areas consider themselves unlikely to be eligible.

In the survey, ALMOs still report that the lifting of the HRA Borrowing Cap and utilising prudential borrowing rules would enable them to develop more houses:

“Lifting the cap would enable us to deliver a more ambitious new build programme whilst delivering investment to existing stock and estates to ensure they remain sustainable...”

“The changes could alter the financing availability of the HRA allowing for the possibility of greater supply of new build housing... however the biggest restriction, being the lifting of the HRA borrowing cap and the move to prudential borrowing is still thought to be very unlikely.”

The definition of 'high affordability' is crucial in whether ALMOs and their parent local authorities choose to go for the additional funding. The NFA is urging the Government to consider the local housing market and average wages when considering affordability pressures and to recognise that there are pockets of high affordability pressures across the whole country, not just in London and the South East.

Right to Buy (RtB)

Of those who provided a response, the majority of ALMOs had been able to spend their RtB receipts within the deadline (17 out of 27) on new build and acquisitions. Of those who were unable to spend the RtB receipts, five have had to return them. Although many ALMOs have been able to spend RtB receipts, there are a number of things which ALMOs report would make it easier:

- More flexibility and a lifting of restrictions on what receipts can be spent on;
- Longer timescales with which to spend RtB receipts;
- Permission to mix RtB receipts with other types of funding (e.g. HCA funding)
- Yearly returns rather than quarterly
- Leaving RtB receipts with ALMOs/ local authorities to spend locally

The NFA continues to lobby with the LGA and the CIH to improve the process for the replacement of homes sold under the RtB policy. We recommend that councils should be able to:

- **Use** RTB receipts to meet more than 30% of the cost of building replacement homes
- **Combine** RTB receipts with grant funding, other capital receipts held in the housing revenue account (HRA) or public land and to pass RTB receipts to an ALMO or other council owned company (provided the money is still reinvested in new homes)
- **Borrow** to supplement RTB receipts without the cap stopping them
- **Extend** the cost floor ceiling, which prevents new council homes from being sold at a loss, from 15 to 25 years
- **Extend** the three-year time limit within which RTB receipts must be committed to five years.

We also believe that the Treasury should forego its share of receipts so that 100% of the revenue raised from sales is retained and reinvested locally in new homes.

High Value Asset Levy

Of the 29 ALMOs which responded to this specific question only five had made provision in their 2018-2019 business plans for the impact of the High Value Asset (HVA) Levy (although low, for some of those who have not, it is likely to be because this is the responsibility of their parent local authority which manages the HRA). In one case, the ALMO specifically reported that they had reviewed their business plan in the light of Government policies including the HVA levy and ‘the planned new build programme will not now take place.’ For another ALMO which had put in place this contingency, they reported that it was making it difficult to commit to significant investment plans alongside other unknown costs, including those arising from the outcomes of the Grenfell Tower fire public inquiry.

PART FOUR: Homelessness Reduction Act

The majority of ALMOs continue to help their council to implement the homelessness prevention strategy which is in place for the district on behalf of the council (80%), while 63% have been involved in the introduction of the Homelessness Reduction Act (HR Act), with the majority of changes being funded through the new burdens funding. This includes additional posts, shared working to review systems, policies and procedures, training for staff on new ways of working, partnership working around prevention and early identification of risk.

Your Homes Newcastle

Your Homes Newcastle (YHN) is closely involved with the local authority and other partners in a range of initiatives to support the implementation of the HR Act. One scheme is a joint pilot in Job Centres where YHN staff are co-located and available to provide support to YHN customers who are identified as being at risk. There is also a member of staff seconded to a multi-disciplinary case work team – funded via the DWP - who are providing intensive support to several identified people at risk.

Barnet Homes

Barnet Homes has put in place recommendations to help increase homelessness prevention, including a customer-ready process and family mediation. They have procured Jigsaw, software to help manage the new H-CLIC data recording and case management requirements. A detailed delivery plan has been created to ensure the service is ready for go-live in April 2018, with staff briefed on changes and trained on the Act. There are two new roles for customer-ready and mediation funded by the local authority.

Stockport Homes

Stockport Homes has worked in partnership with the Council to review the Borough’s Preventing Homelessness Strategy and Allocations Policy to ensure they consider the HR Act requirements. Internally, Stockport Homes Group has been working with other local authorities and providers in Greater Manchester to prepare for the HR Act as part of the GM Homelessness Prevention Trailblazer. This work includes: dedicated workstreams looking at the customer journey, developing common letters, forms and templates and work to investigate the feasibility of a common data system.

However, despite this preparation and a clear commitment to reducing homelessness, two thirds of ALMOs reported that they had concerns in their ability to meet the additional statutory duties to prevent homelessness under the HR Act mainly for reasons outside their control:

- **The new burdens funding** is insufficient to resource the service to the extent required. A sharp increase in the number of people seeking existence is predicted; given the extent of single person ‘hidden homeless’, the 56-day accommodation duty is likely to result in an unprecedented increase in demand, particularly in London. The New Burdens Funding will not be enough to cover this;
- **The impact of the lack of suitable housing**, both in terms of social rented stock, but also in limited access to private rented stock and the ability/ desire of private rented landlords to support the Act. There is a need for more temporary accommodation, and more types of temporary accommodation, especially for single people. Without this, there is a risk that people will end up trapped in inappropriate and expensive bed and breakfasts because of a lack of alternatives;
- **The impact of other social policy changes**. Although the HR Act has a focus on prevention, other social policy changes will undermine this focus. For example, welfare reform policies have impacted on both benefit

entitlements and household incomes, which makes people more financially insecure; while private landlords are less likely to house people on Universal Credit;

- **Bureaucracy** – there are concerns around the bureaucratic nature of the new assessment, prevention and relief duties, and the short timescales for implementation.

Members responded that there were key changes which would make a success of the HR Act and ensure it meets its goals. These include providing additional new burdens funding to manage the anticipated higher demand, and on-going funding after the three year period; effective solutions to enable local authorities to build substantially more homes for social and affordable rent, including removing the Housing Revenue Account borrowing caps and allowing councils to retain the proceeds from Right to Buy properties to reinvest in development; ensuring that welfare reform policies do not have a negative impact on people who are already vulnerable and at risk of homelessness; coordinating a response to homelessness at a national level, which provides the framework for the local level.

The NFA will continue to work with our local authority and central government partners to monitor the implementation of the HR Act and ensure that local authorities and ALMOs can deliver successfully on its outcomes.

The NFA Team

Further details can be found at www.almos.org.uk/nfa_team



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