

STAGE 1: INTELLIGENCE ANALYSIS what do we need to know?			
Objective	Focus	Target Date	Approach/Source
1A To survey all housing stock and collate relevant data onto stock management database and update database with delivered programme outcomes	<ol style="list-style-type: none"> 1. A representative proportion of stock with system derived modelling based on archetype. 2. Rolling programme to capture data for the complete stock (10% p.a) 	Qtr Two	<ul style="list-style-type: none"> • Combination of in house and out sourced resources • Feedback from servicing and maintenance activities. • Property MOT regime
1B Understand the repairs and cyclical maintenance activity.	<ol style="list-style-type: none"> 1. Top 100 properties where activity is centred. 2. Installations of high cost to maintain and operate. 3. Physical characteristic hindering good housing management. 4. Aspects of homes and neighbourhoods detracting from customer satisfaction. 	<p>Qtr Two</p> <p>Qtr Four</p>	<ul style="list-style-type: none"> • Analysis of management systems. • Feedback from residents and practitioners. • Resident Focus Group.

Appendix 3

Objective	Focus	Target Date	Approach/Source
1C Understand the activity of requirements for void properties and letting activity	<ol style="list-style-type: none"> 1. Minimum lettable standard. 2. Contribution to decent homes standard. 3. "Hard to Let" areas or properties. 4. Rental loss during re-let period. 	<p>Qtr Two</p> <p>Qtr Four</p>	<ul style="list-style-type: none"> • Tenancy Sustainment Teams • Housing Demand Teams • Budget forecasting trends • Tenant feedback
1D Catalogue all issues (both anecdotal or factual) which may influence an estate or community investment/regeneration agenda	<ol style="list-style-type: none"> 1. Staff workshop sessions 2. Complaints Team learning outcomes 	<p>Annual</p>	<ul style="list-style-type: none"> • Series of local meetings • By using questionnaires • Brainstorm/interactive discussion
1E Analyse the issues associated with formal complaints	<ol style="list-style-type: none"> 1. Lack of investment in a locality. 2. Failure of specific elements. 3. Customer services issues. 	<p>Qtr Two</p> <p>Qtr Three</p> <p>Qtr Four</p> <p>Qtr One</p>	<ul style="list-style-type: none"> • Complaints handling monitoring system. • Responsive Repairs complaints analysis

Appendix 3

Objective	Focus	Target Date	Approach/Source
1G To understand the local housing need and projections for future demand	1 Housing Needs Survey 2 Lettings activity	Qtr Two Qtr Three Qtr Four	<ul style="list-style-type: none"> • Housing Demand Teams
1H Establish the investment projections and factor into HRA Business Plan	1. Sufficient resources to complete commitments. 2. Compliance with covenants. 3. Improvement of surplus.	Qtr Two Qtr Three Qtr Four	<ul style="list-style-type: none"> • Stock condition survey results. • 30 year forecasts. • Business Plan model.
1J Review Service Plan and embed investment priorities	1. Compliance with core values. 2. Achieving improved surplus.	Annual	<ul style="list-style-type: none"> • Housing Board • HS SMT

STAGE 2: CONSULTATION AND INVOLVEMENT		who do we need to discuss with and inform?	
Objective	Focus	Target Date	Approach/Source
2A Devise and implement a Communication Strategy for key stakeholders (Councillors, CMT, and Residents) to outline the principles of the AMS.	<ol style="list-style-type: none"> 1. Communication Strategy 2. Residents Handbook 	August 2016	<ul style="list-style-type: none"> • Housing Board • Communications Team • Community Engagement Team
2B Constitute a periodic Sustaining Homes focus group and ensure cross tenure and age involvement.	<ol style="list-style-type: none"> 1. Resident Involvement Strategy. 	October 2016	<ul style="list-style-type: none"> • Tenant Representatives • Community Engagement Team
2C Undertake a series of discussions with key stake holders on the implications of the Asset Management Strategy	<ol style="list-style-type: none"> 1. Members 2. CMT 	August 2016	<ul style="list-style-type: none"> • Publication of Asset Management Strategy. • Face to Face Meetings
2D Publication of 5 year investment programme to all tenants/residents	<ol style="list-style-type: none"> 1. Keystone Asset Management Tool. 2. Property Services management. 3. Housing Services management. 4. Works deferred from decent homes 	April 2017	<ul style="list-style-type: none"> • Website • Postal issue with “At the Heart” publication. • OPENHousing Management system

STAGE 3: PLANNING what do we need to do?			
Objective	Focus	Target Date	Approach/Source
3A Plan operational change, to enable new programmes to be delivered, in accordance with procurement policy and in relation for need to manage strategy, data, planning process etc.	<ol style="list-style-type: none"> 1. All procurement and required internal infrastructure. 	Qtr One 2017/18	<ul style="list-style-type: none"> • Involve relevant staff in the review and planning process • Acknowledge conflicting pressures between delivery (project management) and planning and standards.
3B Construct Options Appraisal model for review of voluntary disposals and redevelopment considerations.	<ol style="list-style-type: none"> 1. Financial information on income and expenditure. 2. Market conditions. 	Qtr Two 2017/18	<ul style="list-style-type: none"> • Finance Services. • Housing Services Management Team • External data (RICS)
3C Re-construct property related budgets into distinct categories for apportionment to defined work areas.	<ol style="list-style-type: none"> 1. Accurate budget reconciliation. 2. Profiling to model activity. 3. Provision of resources to reflect objectives. 	Qtr One 2017/18	<ol style="list-style-type: none"> 1. Finance Services 2. Management system 3. Contact Centre 4. Property & Land Services Teams
3D Plan on-going stock condition survey updates	<ol style="list-style-type: none"> 1. 10% per annum of representative sample. 	Qtr Two 2017/18	<ul style="list-style-type: none"> • Internal resources • Keystone Asset Management System

Objective	Focus	Target Date	Approach/Source
3E Implementation of the key themes into all operating areas attributable to property management	<ol style="list-style-type: none"> 2. Tenants expectations. 3. Statutory and regulatory requirements. 4. Prevailing economic market conditions. 5. Unit costs for management and maintenance. 	Qtr Two 2017/18	<ul style="list-style-type: none"> • Market analysis. • Finance Services • Management Systems.
3F Update Business Plan model incorporating financial forecast of 30 year investment requirements for assets.	<ol style="list-style-type: none"> 1. Stock Condition Survey. 2. Interest rate and growth assumptions. 3. Income assumptions. 	Qtr Two 2017/18	<ul style="list-style-type: none"> • Finance Services • Survey results. • Market analysis.

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Objective	Focus	Target Date	Approach/Source
3G Identify procurement options for delivery	<ol style="list-style-type: none">1. Value for Money.2. Modern Methods of Procurement.3. Existing arrangements.4. “procurement for housing” or similar framework arrangements.	Qtr Three 2017/18	<ul style="list-style-type: none">• Available Frameworks.• SME Agenda.• External Bench marking
3J Plan an annual review process to keep the Strategy up to date	<ol style="list-style-type: none">1. Business Plan review timescale.2. Budget Monitoring.	Qtr Four 2017/18	<ul style="list-style-type: none">• Corporate business process

STAGE 4: IMPLEMENTATION how are we going to do it?			
Objective	Focus	Target Date	Approach/Source
4A Plan operational change, to enable new programmes to be delivered, in accordance with procurement policy and in relation for need to manage strategy, data, planning process etc.	<ol style="list-style-type: none"> 1. All procurement and required internal infrastructure. 2. Previous works deferred from previous programmes 	Qtr Three 2017/18	<ul style="list-style-type: none"> • Involve relevant staff in the review and planning process • Acknowledge conflicting pressures between delivery (project management) and planning and standards.
4C Establish primary redevelopment properties and implement delivery tool kit	<ol style="list-style-type: none"> 1. Tenant Consultation. 2. Previous experience. 3. Legal Requirements. 4. Loan charge arrangements. 	Qtr Two 2017/18	<ul style="list-style-type: none"> • Sustainability assessments

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4D Implement revised Options Appraisals protocols for disposals or redevelopment.	<ol style="list-style-type: none">1. Financial Regulations.2. Unit costs for management and maintenance.3. Investment to Value relationship.4. Rental Loss.	Qtr Two 2017/18	<ul style="list-style-type: none">• Housing Services.• Market analysis.• Option Appraisals tool kit
4F Ensure corporate monitoring and key performance indicators are in place and reviewed.	<ol style="list-style-type: none">1. KPI system2. Housemark benchmarking.3. Operational Performance.	Qtr Three 2017/18	<ul style="list-style-type: none">• Property & Land Services.• Finance Service.• Performance Management.
4G Test initial conclusions on investment requirements against availability and outputs	<ol style="list-style-type: none">1. Business Plan	Qtr Four 2017/18	<ul style="list-style-type: none">• Working with Finance to test conclusions against Business Plan

