

Issue 16 - 2014

Bulletin

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National Housing
Maintenance Forum



Understanding the
Social Value Act

10



The financial case
for adapting to
climate change

24



Compelling reasons
for development and
maintenance teams to
work together

5

Setting the standard for maintaining assets

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Special features

Working for better homes	p3
Common goals for development and asset management	p4
Compelling reasons for development and maintenance teams to work together	p5
Acronyms	p11
NHMF Study Tour 2014 - Jersey	p18
NHMF Awards	p28
NHMF Training	p35

Procurement

Procurement clubs: an obvious solution?	p6
All change on the European front	p8
The journey to Celtic Horizons	p9

Social value

Understanding the Social Value Act	p10
"Repairs Plus"	p12
What is CSR?	p14
Measuring social value	p15
Japanese knotweed	p16

Contents

The National Housing Maintenance Forum (NHMF) sets the standards for maintaining assets and manages the development of the M3NHMF Schedule of Rates. For more information visit www.nhmf.co.uk



Welcome to the NHMF Bulletin 2014

www.nhmf.co.uk

Liz Circuit, Secretary (NHMF)

On behalf of the National Housing Maintenance Forum (NHMF) I would like to thank all our contributors for the time spent preparing these articles and for sharing their views and expertise. All the articles relate to the perennial balancing act of using the available budget to provide good, safe housing to be enjoyed by generations to come.

Wouldn't it be nice if housing was the topic on every politician's lips during the forthcoming election? There is a wealth of academic research showing how improvement in housing conditions reduce health problems and improves educational attainment (Freidman.D, 2010 ECOTECH.com), so it must follow that investment in housing can be shown to have a triple economic benefit. Please remember to point this out if a politician crosses your path.

In March, M3 moved to new offices which certainly made us feel better. The new space is the result of a six month refurbishment of what was at one time the local pub, The Three Kings. Before you protest, you should know that there are six other pubs within walking distance so the area will not be dry as a result of our intervention. The building had been derelict for two years before we decided to save it. The many site visits arising from the builders regular calls announcing, *'I think you should come and see what we've found'*, would have been hard to manage if they hadn't been just round the corner. The move took us 100 yards from number 5 to number 23 Commonside East in Mitcham, Surrey.

The Three Kings has taught us much more than we could have predicted. Our neighbours have welcomed us, and told us many, happy stories about celebrations of birthdays, jubilees and weddings held at the pub, counterbalanced by tales of anger, violence and wrong doing within its walls. We are very alert to the changes that have taken place since it was first built in 18th century and rebuilt in 1926. It is a clear reminder of how buildings depend on people to maintain them and bring them to life.

Mitcham was once known for its gardens, nationally famous for herbs and lavender and internationally recognised for mint, being a major centre for cultivating new varieties. Most of the mint in sweets and toothpaste today comes from massive scale production in America where they mostly grow a variety called Mitcham Black.

From 1930 to 1960, in common with villages around London, the big garden of Mitcham became another suburb, and by 1950 the school children were being bussed out to work the harvest on farms during the summers, as local crops production had ceased. We have been wondering for a number of years how we might help to reintroduce an interest in the environment and food production for future generations.

A chance conversation with a client led us to the headmistress of one of the largest local primary schools which educates 700 children. She had a vision about showing her pupils and families the heritage of Mitcham through providing a space to learn about cultivating plants and growing food. A three way partnership evolved using the skills and knowledge of the staff at Deen City Farm (deencityfarm.co.uk), the expertise of the staff at Liberty School and sponsorship from M3 to create an outdoor learning centre with a wild flower meadow, fruit trees, herbs, vegetables and plenty of space for large numbers of children.



The rain came down to bless the opening of the garden in April where, apparently oblivious to the weather, pupils spent a happy, muddy day planting the first seeds, plants and trees while adults, including parents, local politicians and M3 staff, looked on with envy trying to remember a time when they didn't notice rain filling their shoes. We hope they will all return to do the weeding when the sun shines.

The garden is a good example of how much can be achieved with a small amount of money when placed in the hands of the right people. This brings me back to the articles in this Bulletin where we hear from the experts who all remind us how important it is to apply budgets with careful consideration. I hope that you will find it useful and informative.



Value for money

M3NHF Schedule of Rates Version 6.2	p17
Taking control of specification	p20
Asset management: the magic answer	p21
Leaseholder challenges: demonstrating value in service charges	p22

Preparing for climate change

De-risking retrofit	p23
The financial case for adapting to climate change	p24
Renewable heating in social housing	p25
To be or not to be... resilient?	p26
Affordable water for affordable housing	p30

Health and Safety

Developing a winning strategy for safety	p31
Where does the fire safety buck stop in your organisation?	p32
'All that glitters is not gold: many a man his life has sold'	p33
Lift codes: being prepared for change	p34
Access for heating servicing: can we be more efficient?	p35



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Working for better homes

Special feature

David Orr, Chief Executive (National Housing Federation)



Of all the conferences I speak at, and there are a lot, one of my favourite things about speaking to the NHMF Conference is that it is the best opportunity I have to get a clear view of what is actually being delivered by asset managers across the country. So instead of just talking at the audience, I decided to ask a few questions. The answers to which were instructive:

- Do you think that you have sufficient engagement with development colleagues? No
- Will the newer technologies for energy efficiency renewables be easy to maintain? No
- Do you think that your board and executive team have a clear enough understanding of the future costs of what they are building? No

To which my response is, why not? This seemingly perennial disconnect between development and asset management never ceases to amaze me. Who better to look at the long term implications of any development proposal than the people who will be responsible (and accountable) for maintaining these properties in the future? Who better to assess the risks and benefits of installing new technology than the people who have suffered through the frustrations of the old technologies?

And yet, it can't stop there. We all know that the bill for maintaining properties is huge. That sometimes the best thing to do is knock down an existing, inefficient and unlovely building and begin again. To create something that not only meets the needs of today's residents, but future residents as well. However, the current Government emphasis on refurbishment rather than demolition in the 2015-18 HCA Affordable Homes programme means that this will be more difficult to achieve as it could force people to refurbish inappropriate properties.

There is, quite rightly, a huge amount of government emphasis on housing supply and the need to build more homes. But this sector, more than any other, knows the dire implications of not building homes to the right standards. Indeed, we know more than any other the implications of building homes to ill thought through standards which emphasise a technological solution without an understanding of how this will be implemented by residents. The issues raised by many of our members regarding NIBE boilers were a case in point.

However, it is important that the setting of standards and inevitable cost consciousness doesn't stifle the innovation and adoption of new technologies that our sector has proved so good at. So how do we achieve the balance between value for money and innovation? It is easy to stick with what you know; to maintain homes on a 'like for like' basis.



But that means we will just keep on producing more of the same which won't deliver the low energy consumption that is so important and won't deliver the step change in carbon reduction that the Government has pledged, and that to be frank the planet needs.

"This seemingly perennial disconnect between development and asset management never ceases to amaze me"

You will be aware that the Government has recently published its response to the Housing Standards Review consultation. In working with Government on this review the Federation drew heavily on our members, both colleagues working in development and asset management, to paint a realistic picture of the implications that standards have, and will have, on development and ongoing running costs, both for tenants and housing providers. This is an excellent example of how we can work together – your expertise and experience feeding directly into Government policy making. This is a model that we want to develop further.

The Federation wants to work more closely with the NHMF and its members to be able to make sure that your voices are heard within the corridors of Whitehall and Westminster; that the new building regulations which will be drafted will result in new homes which are cheaper to run for tenants and asset managers. Homes that are truly fit for the 21st century, and possible beyond.



Common goals for development and asset management

Alex Dixon, Director of Asset Management (Bromford.)

Do asset management and development work together as well as they could to produce a cost effective, desirable, efficient home that will provide a great living environment for the long term and be as low maintenance as possible?

The answer should of course be yes, but is it? At Bromford we have been working together for many years to ensure it is. The key is to understand the drivers for each of the teams and the outcomes required for the customer.

Asset management want to ensure that our homes are free from repairs, are efficient to run, are safe and provide the customers with the long term living environment they want and need; development want to achieve this as well, but have to ensure that the schemes they are developing meet planning, building regulations and other requirements such as the code for sustainable homes and also meets the financial parameters set by the organisation for affordability. These requirements can often lead to perceptions that what is being developed is not what is required. Materials, systems and technology can be installed that enable the scheme to achieve its requirements but add additional costs to maintenance and make servicing the properties more problematic.

At Bromford we have taken the two drivers to heart and made a number of decisions that have enabled all colleagues to work together for the development of great homes that will serve our customers well for the long term as well as minimising confusion or additional maintenance. These decisions were to:

- Form a group to oversee the technical specification for all new development and for planned and responsive maintenance so we only specify and fit materials, systems and technology we all agree on and that are proven over time
- Agree that wherever possible we will meet our efficiency requirements through passive means; we try to produce homes that meet our requirements without additional technology
- Developing every new scheme through a project team that includes colleagues from all parts of the business. This ensures that all teams drivers are met and/or compromises are made knowing the impact on the business
- Construct as many new schemes as possible utilising the skills and experience of our internal construction team BDL

“The key is to understand the drivers for each of the teams and the outcomes required for the customer”

- Review each scheme a year after it has been developed and again in the future to ensure that any lessons we can learn from the development are imbedded into future scheme or changes in the way we do maintenance

So what has all this achieved? Well, it has achieved cohesion between the teams and a broader understanding amongst the business of the things that drive each team to achieve the outcome of providing great homes for our customers. It has embedded new technical solutions and allowed us to look at what we build and maintain for the long term.

Compelling reasons for development and maintenance teams to work together

Alison Mathias, Manager (Existing stock) (HCA)

There are ever more compelling reasons for development and maintenance teams to work together. It is well known that social housing maintenance and asset management teams are a different species from providers' development teams. They have different operating environments; different challenges, and constraints; even quite different cultures; and often they do not share an office. Their objectives are however the same: to ensure that their tenants and residents are securely and comfortably housed. At the HCA's Construction Forum in February this year, we heard from the Spectrum Housing Group on how it integrates new build development with maintenance – see the 'Construction Forum 2014' news article on the HCA website.

Improving the energy efficiency of the housing stock is a key objective for asset management as well as for development personnel. The Department for Energy and Climate Change (DECC) published the Renewable Heat Incentive (RHI) scheme for domestic consumers on 9 April.

The scheme will be administered by Ofgem and there is useful information about RHI domestic scheme on the Ofgem website. Eligible heating systems include: Biomass only boilers; biomass pellet stoves with integrated boilers; air source heat pumps; ground source heat pumps; and solar thermal panels (flat plate or evacuated tube only). Registered social landlords are eligible to apply.

A number of social housing providers have already received payments under the RHI Premium Payments (RHIPP). Systems installed up

to two years ago will be eligible, with a phased approval of such 'legacy schemes'.

“Improving the energy efficiency of the housing stock is a key objective for asset management as well as for development personnel”

Finally, it may be useful to social landlords to know that landlords are eligible to claim Green Deal Cashback: see www.gdcashback.decc.gov.uk/. Amounts under this scheme include up to £270 for upgrading a boiler to a condensing boiler, or £650 for solid wall insulation. Other measures eligible for cash-back include upgrading from single glazing, or secondary glazing; floor insulation; and flat roof insulation. A Green Deal Assessment has to be carried out, and measures must be installed by a Green Deal Installer: but green deal finance does not have to be used, and the costs can be paid up front. Green Deal Cashback is subject to State Aid de minimis rules: it's limited to 200,000 euros (about £160,000) over three consecutive years.

Case study: Spectrum Housing Group

Alison Mathias

Spectrum Housing Group is running a pilot, testing the integration of new build development with maintenance. Spectrum has a development target of 2,500 homes by 2018. The Group maintains 45,000 homes as well as a number of commercial and public buildings. It undertakes price comparison between bulk volume tender for maintenance with their OJEU procured builders' merchants, and the new build framework contractors. The aim is to realise savings on building components. An extension to this arrangement is that Spectrum Property Care, a subsidiary of Spectrum Housing Group, has acted as a domestic subcontractor for its main new build contractor. Spectrum plans to evaluate the scalability of this business stream.



The team at Spectrum came together around the procurement of the new build framework so that it enabled, rather than stipulated, the opportunity to involve the people who maintain the homes in the installation of key maintenance elements (KME). The framework did however demonstrate the methodology for appraising the year one capital cost of the impact of poor

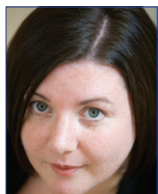
integration of the new build supply-chain with that of the maintenance supply chain.

The integration of development with maintenance teams spend, coordinated by our specialist procurement team, leads to the elimination of duplicate effort across the business, to increased productivity of the procurement process, and improved supplier management. Paul Read, Development Director at Spectrum, argues that whilst setting the financial impacts is still an art rather than a science, the practice of appraising all schemes as if they deliver the same maintenance output is a key barrier to ensuring value for money is achieved in our investment decisions.

Procurement clubs: an obvious solution?



Karen Thody, Director (Cameron Consulting)



On paper, it would seem that procurement clubs offer a myriad of benefits to buyers. There is evidence to suggest that 'buying collectively' does bring solutions that benefit the greater good. On the other hand, there is also evidence of what can happen when a 'procurement club' goes wrong. At the point of writing, there are 13 consortia/procurement clubs representing almost 200 landlords who belong to the Homes and Community Agency-run Procurement Efficiency Initiative, with an estimated 20 clubs under way across England in total.

What the HCA believe

The Homes and Communities Agency (HCA) believe that procurement clubs can work together for 'the greater good' to:

- Share best practice
- Identify common issues
- Develop inter-consortia working and alliances
- Provide systems for benchmarking and inter-consortia comparison

Considering a procurement framework

Practical priority 1: Ensure the measures between procurement clubs are aligned to demonstrate 'real' data and allow the clubs to demonstrate their effectiveness and buyers to review this before deciding the most appropriate route for their own procurement activity. What happens when things go well

- Time savings
- Compliance with UK and EU legislation

- Best practice
- Demonstrable value for money

Some cite the 'social value' that their clubs bring, whether it be a wealth of apprenticeships or re-investment into the local community. However, there is concern relating to how social value is actually being measured in line with the tender promise that suppliers are making in their submissions.

Practical priority 2: Ensure that social value requirements for individuals calling off from the framework have been taken into account during the procurement process. This should really require early engagement by named buyers to ensure that their individual requirements and that of their end users have been taken into account. The act certainly applies to framework agreements and must be taken into account – how this trickles down to individual organisations is somewhat less transparent than the initial consultation requirement.

Mine is bigger than yours

One of the largest areas of positivity around use of procurement clubs sits in supplier frameworks. For example, there are a number of supplier frameworks which look specifically at their 'bulk buy' ability for high usage items such as boilers. However, while good rates are being achieved as a result of supply frameworks, it is common to hear contractors advise that they can actually achieve better rates as a result of the sheer buying power they have.

Practical priority 3: Understand what it is you need to buy and develop your strategy appropriately. Yes, you may think using a framework is the 'simpler' option, but what if creating a supplier framework with existing contractor partners would lead to greater efficiencies; better guarantees; shorter lead in times?



Competing market forces

It should be remembered that procurement clubs are competing for your business. They all offer different methods of 'buying' from their framework solutions. Some are 'subscription based' while some are in essence 'free at the point of entry' and the supplier is charged a percentage of their total fee each and every time they are called off. Most procurement clubs have key account teams who advise the features and benefits of their individual club. What may be less obvious is how the potential buyer can make a direct comparison, or indeed ensure that they are compliant in use of the framework agreement.

Practical priority 4: Before selecting a procurement club to deliver a particular element of your service requirement, undertake a quick analysis of:

- Which procurement clubs offer the scope of service you actually require
- What the costs will be of making use of the framework
- Whether your organisation is actually able to make use of the framework (i.e. have you in some way been named within the original contract notice)
- Does it 'fit' with your organisation's procurement strategy and/or procurement standing orders

Leaseholders

So, you have gone through all of the practical priorities above and you think you are home and dry and ready to make use of a pre-arranged framework. One of the biggest problems for housing clients in accessing 'procurement clubs' is that these cannot be used where works/services/supplies are provided to leaseholder owned properties. This is because a framework agreement itself is not classed as a 'Qualifying Long Term Agreement' (QLTA) because there are no specific projects to consult on. Therefore, consultation can only take place on the 'call-off' contract.

In essence then, if a housing client accesses a framework via a 'procurement club' they would still need to consult on the specific project, which could mean that a leaseholder could nominate a non-framework contractor, through the nomination process. In theory, this would work where the value of the works/services/supplies are below EU thresholds. Where the value of the call-off contract exceeds EU thresholds and where the works/services/supplies apply to leaseholder properties, then a separate OJEU compliant tender must be undertaken and any framework accessed via a Procurement Club would not be appropriate.

Owing to limitations of these frameworks to ensure compliance with leaseholder consultation, housing clients would not be able to use them.

Finally, it is highly unlikely that leaseholders would have been consulted in the establishment of any framework in a procurement club for the reasons set out above.

Practical priority 5: If you have leaseholders, are you absolutely sure that the framework you are proposing to utilise has undertaken section 20 consultations in a manner that satisfies the requirements of the Landlord and Tenants Act (1985)? If not, then you should seek advice as to the most appropriate route for your organisation to procure the services required to remain as risk free as possible.

“There is not a ‘one size fits all’ model for construction frameworks, as local market conditions and regional economic influences will shape how a framework is procured and contractors are selected. However, there are fundamental characteristics of quality construction frameworks...”

Final thoughts

In summary, there are certainly benefits to using procurement clubs for less complex procurements and those not involving leaseholders. You can achieve quicker turnaround, limited procurement investment, reduced client input, benchmarked data is available and you will be in line with national agendas. However, if you have any concern relating to:

- Social Value Act (2012) consultation
- Leaseholder consultation
- Being a 'named' contracting authority on the original contract notice
- The scope of services aligning fully with your requirements

Then you should at least undertake a procurement strategy review to ensure that you have minimised your overall risk and capitalised on the potential benefits which may be available to you through the use of procurement clubs.

All change on the European front

Andrew Millross, Partner (Anthony Collins Solicitors)



Where are we now?

There is a quiet, fearful anticipation in the trenches. After a barrage of consultations from the Cabinet Office on how to implement the new

European procurement Directives in the UK, the consultation process has now fallen silent.

Given the Cabinet Office's "big push" to "fast track" UK implementation of the new Directives, the UK Regulations are imminent. Although the Directive allows up to two years for implementation, the Cabinet Office clearly wants to be fully EU updated "by next Spring".

We don't know exactly why the Cabinet Office wants to implement the UK Regulations so quickly (there are several rumours), but we do know it is in response to political pressure.

“In order to minimise the risk of challenge under the new Regulations, housing providers will therefore need to make drafts of all the procurement and contract documents available on their website before submitting the OJEU Notice”



Housing providers need to be aware of some key risks from the implementation of the new rules.

Procurement documents

There is one major change in the new rules that stands out above all others. Article 51 states that,

“Contracting authorities shall, by electronic means offer unrestricted, full and direct access free of charge to the procurement documents from the date of publication of the OJEU notice”

“Procurement documents” are defined in Article 2(15) as,

“any document produced or referred to by the contracting authority to describe or determine elements of the procurement or the procedure, including the OJEU notice, the technical specifications, the descriptive document, proposed conditions of contract, formats for the presentation of documents by bidders, information on generally applicable obligations and any additional documents”.

In order to minimise the risk of challenge under the new Regulations, housing providers will therefore need to make drafts of all the procurement and contract documents available on their website before submitting the OJEU notice. Preparation of these documents needs to start now for procurements later this year.

New financial prequalification rules

The Directive will limit the financial prequalification information that can be asked for. This is a major concern in relation to contractor solvency. Housing providers will no longer be able to use credit reference reports and a contractor's financial strength will

need to be assessed primarily from financial ratios in its annual accounts.

The Directive also limits the minimum turnover threshold to twice the annual contract value. This could mean the housing provider's work representing up to a third of the contractor's turnover.

Housing providers must therefore be much more wary over potential contractor insolvency. Planning for this could involve, for example, setting up framework agreements with “reserve” contractors, and making more use of performance bonds and retentions.

Prequalification self-declaration

The Directive envisages that contractors will self-declare that they have met the minimum prequalification requirements. This will not be checked until the end of the procurement. Whilst this may be helpful in terms of reducing administration, it is likely to increase the risk of challenges. A contractor that has tendered and “won” the contract is almost certain to challenge if they are deselected for failing to meet minimum prequalification requirements, despite having self-declared that they did meet them.

This is a particular concern where a contractor is excluded for “serious deficiencies” in performing prior public contracts. The risks here mean that it is going to be very difficult for a housing provider to exclude a contractor for poor prior performance other than in the most obvious of cases.

Inevitably there will be some casualties, in terms of both procurement challenges and contractor insolvencies, in the march towards the new regime. Housing providers should maximise their chances of surviving these through proper preparation.

The journey to Celtic Horizons

Procurement



Luke Mitchell, Head of Property (United Welsh)

United Welsh has developed a model which introduces new concepts including the “Complete Property Service”, a creative lean working approach to improving efficiency and maximising resources through:

- performance measurement through incentivised KPIs and feedback
- targeted recruitment and training
- flexible appointments utilising high levels of stakeholder engagement
- dedicated call centre
- follow-up calls within 30 minutes of completed visits
- independent verification by random 150 calls per month to customers

Many of the ideas arose from a report jointly developed with Bath University involving the United Welsh property team.

Background

United Welsh owns and manages around 5,000 residential properties across 11 local authorities in South Wales, directly employing 134 people, plus an additional 104 in our wholly-owned subsidiary, Celtic Horizons.

We went live in March 2013 which has already resulted in the delivery of a more efficient and effective asset management service.

United Welsh needed to address the amount of repair based visits made to their properties each year, while taking into account that the highest expenditure was on the operatives’ time and the fuel required to get to each visit.

This innovative approach addresses repairs at the same time as the annual gas service visit. Tenants are incentivised to hold non-urgent

repairs back until the complete property service visit. This approach has reduced the number of repairs visits, as well as ensuring that tenants understand that repairs of an urgent and emergency nature will be responded to within a two hour window.

Options for a framework for the new service provision format were agreed, then other relevant stakeholders’ views sought.

To enable bidders to distinguish their offers and engage in challenging discussions United Welsh adopted a lean competitive dialogue process.

Bidders offered a range of solutions and enabled United Welsh to refine and develop its requirements sufficient for bidders to return fully developed proposals in their best and final offers. The process delivered Mears as United Welsh’s partner.

The scoping involved the following outputs:

- **Benchmarking service:** a detailed analysis of the current levels of service and the cost of delivery
- **Resident engagement:** “Hearts and Minds” workshops were held to identify the strengths and weaknesses of the current service provision and also their aspirations for the service going forward
- **Internal stakeholder workshop:** workshops were held with representatives from all the internal stakeholder groups at United Welsh (asset management, finance, housing, IT) to identify the strengths and weaknesses of the current service provision, and their aspirations for the service going forward

Key Outcomes: On completion of these initial scoping events, a detailed improvement action plan was developed that captured all the service

“Tenants are incentivised to hold non-urgent repairs back until the complete property service visit”

improvements identified with a detailed process as to how they would be delivered through the procurements exercise.

Benefits: The procurement model has delivered the following benefits:

- **For United Welsh:** the PPP model will deliver more certainty around budgets on an annual basis and over a longer term
- **For the contractor:** the contractor has clear guidelines on items included and excluded from the model, which incentivises the contractor to achieve more right first time fixes and drives down voids turnaround times against agreed KPIs and variable fee targets
- **For the resident:** An enhanced service delivery from Operatives empowered to deal with repairs at one visit
- **Appointments:** all repairs will now have a repair offered at first call due to the provision of the call centre by the service provider
- **Call centre/Single point of contact:** this provides a single point of contact for all repairs and estate based related calls
- **Work opportunities:** three apprentice places for tenant’s family members, and both paid administrative and voluntary ground maintenance team opportunities for tenants

Year one of the project has gone so well that we are bringing the major repair programme into our subsidiary from April 2014 one year ahead of programme. This will offer a further 30 employment opportunities.



Understanding the Social Value Act

Peter Holbrook, Chief Executive (Social Enterprise UK)



In January 2013, the Public Services (Social Value) Act came into force. The law calls for public sector commissioners to try to weave in social and environmental benefit that is beyond the primary purpose of a contract. This means that public bodies, including housing associations and local authorities, can ask contract providers – whether they are private businesses, charities or social enterprises – to deliver services in a way that also creates added community value. An example of this would be creating local apprenticeships or jobs for disadvantaged people, such as those who are long term unemployed, living with a disability or have spent time in prison.

The Act is the result of a two-year long campaign by the social enterprise sector. As businesses trading for social value, the UK's 70,000 social enterprises inherently place social value at the heart of how they work. But support for the Act goes far beyond the social enterprise community. With less money from the public purse available to go round, the Act allows commissioners to get more bang for their buck. From the contractor building premises to the caterer who supplies the sandwiches for

meetings, the decisions public bodies make about the providers they do business with can have a huge knock-on effect.

Each and every pound of public money spent needs to be working as hard as it can for local communities across the country. That is why we are so pleased that private firms are embracing the Act alongside social enterprises and charities. Over the past twelve months, the team at Social Enterprise UK has noticed a marked increase in the number of private companies wanting to understand how they can take practical steps to create social value and report on their social impact. This is not surprising, as many private companies deliver contracts on behalf of public bodies. One of the UK's largest construction firms, Wates, with whom we are working, does 70% of its business with the public sector.

One way in which Wates is delivering social value is through its supply chain: the firm recently launched the industry's first Social Enterprise Brokerage Scheme. The aim is to get every one of its construction sites in the UK trading with social enterprises, and to spend £5 million with the sector by 2015. With our help, a 'one stop shop' of social enterprises has been created from which the company's teams of

“Each and every pound of public money spent needs to be working as hard as it can for local communities across the country”

construction workers can source services. The company is on track to meet its target and has so far traded around £4 million with the social enterprise sector.

Social value pioneers in the private sector are also taking steps to create employment opportunities and local economic growth, and reduce environmental damage. Landmarc Support Services, which manages the Ministry of Defence's national training estate, is investing £750,000 over the next two

years in rural communities through initiatives including; Landmarc 100, which will provide financial support and mentoring for 100 start-up enterprises; and The Rural Enterprise Hub, a free-of-charge touch-down office facility for rural entrepreneurs. And in 2013, the company diverted 94% of all waste from landfill, up from 70% in 2012.

Contractors, in both the private and social enterprise sectors, also have to measure their social impact – this helps them understand, manage and communicate the social value that their work creates in a clear and consistent way. Information about social impact provides substance and strength to contract bids, informing commissioners of the added or increased benefits. But measuring your social impact is also good for staff morale, and also when selling to other customers. People like to work and do business with organisations that are doing good things for the communities they work in. Creating social value has many advantages.

For more information and resources on the Act, visit www.socialenterprise.org.uk



Acronyms

We have tried, where possible, to ensure that acronyms are explained within articles. For those instances where this was not possible, however, here we have listed some commonly used acronyms.

Acronym	Explanation		
(ASHP)	Air Source Heat Pump	(LEAP)	Learning Employment and Achievement Programme
(CERT)	Carbon Emissions Reduction Target	(PPP)	Price per Property
(CESP)	Community Energy Saving Programme	(PV)	Photovoltaic
(CSR)	Corporate Social Responsibility	(QLTA)	Quality Long Term Agreement
(DECC)	Department of Energy and Climate Change	(RHI)	Renewable Heat Incentive
(DLO)	Direct Labour Organisation	(SAP)	Standard Assessment Procedure
(ECO)	Energy Company Obligation	(SHIFT)	Sustainable Homes Index For Tomorrow
(EU)	European Union	(SWI)	Solid Wall Insulation
(HCA)	Homes and Communities Agency	(TUPE)	Transfer of Undertakings (Protection of Employment)
(JV)	Joint Venture	(WOS)	Wholly Owned Subsidiary



“Repairs plus”

Shaun Aldis, Director of Property Services (Wolverhampton Homes)

You wouldn't think a text message booking a taxi would transform a housing repair service, but that is exactly how Wolverhampton Homes was inspired to improve its housing repair service.

It all started with a chance visit to a local taxi firm. The call handling was polite, courteous and to the point: name, where from, where to, what time, and how many? On its way! Then a text when the taxi is waiting outside.

The days are long gone when housing repairs were about fixing a leaking tap then being on our way. Our repairs service goes way beyond that; offering advice and signposting support on issues ranging from children and vulnerable people safeguarding to welfare reform and rent arrears.

Our Repairs Plus vision is taking housing repairs as an operational procedure and embedding it into the very heart of what our company stands for; quality service, better homes and making a real difference to our local community. That is the challenge our Repairs Plus vision is looking to meet.

More of our customers are using online services, and we know that thousands of local people are struggling with the new welfare reforms. The challenge for us was to design a repairs service which embraced technology and delivered a service which added value.

We looked at our customer profiling and asked how our “customer of the future” would want to interact with us; 50% of our tenants have access to the internet, 29% have Smart Phones and 66% of those use social networks. Nearly 3,000 tenants are now using our Do-it-Online service to pay their rent, manage their account and track and report their repairs.

Tenants receive texts to confirm appointments, a reminder the day before and a text message to say the trade operative is on their way.

By improving our online services and embracing text messaging technologies we expect the numbers of phone calls we take to fall over time, allowing contact centre staff to help and support our more vulnerable tenants.

“The days are long gone when housing repairs were about fixing a leaking tap then being on our way.”

In a city with high unemployment and higher than average levels of deprivation, shifting residents online potentially risks them becoming more isolated from the other services we offer.

Repairs have a big part to play in helping us overcome this. We carry out over 60,000 repairs a year; an opportunity not to be missed. When we visit we make it count – our trades colleagues can be the eyes and ears of front line services.

For many tenants, their only face-to-face contact with our staff will be when our repairs teams visit, so all trade colleagues have exactly the same customer service training as every other member of staff in the company.

But it is not just about fixing things. Our repairs teams are trained to identify, report and signpost

tenants on issues ranging from safeguarding, domestic violence, drug use, child protection and even combating extremism.

We've also been able to boost our repairs service through our multi-award winning Learning Employment and Achievement Programme (LEAP). This apprenticeship programme has given valuable skills and training to long-term unemployed tenants. Some go on to permanent roles and have been able to boost their skill-set and increase our capacity to provide a more reactive service.

Our on-demand service was introduced to meet increased customer expectation and to provide a better, more holistic service and something extra; something beyond what you would expect from a repairs service.

Repairs are not just about fixing things, it is about our service, it is about exceeding expectation – it is about our tenants!



The Contractor Forum was established for contractors working on social housing with the goal of creating greater alignment between contractors, clients and sub-contractors. It works closely with the National Housing Maintenance Forum (NHMF), in promoting good practice in the procurement and management of repairs. The NHMF has long had at least one representative on the Forum's committee, to ensure that the contractor's perspective is fully understood when developing the M3NHF Schedule of Rates and related products. The Forum has now met ten times, most recently in Wolverhampton at the end of April 2014.

Membership is open to any contractor providing maintenance services to managed housing. Current membership includes a good cross-section of large, medium and smaller sized contractors and specialist sub-contractors.

The many benefits of membership include the opportunity to participate in meetings of the Forum and to shape the development of products and services that are widely used in the sector. Members receive copies of the NHMF bulletin and are kept regularly updated on the development of products, services, seminars and conferences under the NHMF banner. Membership provides the opportunity to get involved in matters that are of particular interest.

Some of the topics that have been discussed at previous meetings are: the production of a procurement guide aimed at reducing some of the costs of tendering for both contractors and clients while promoting effective competition; the establishment of as industry standard for the handling of TUPE at contract handover; and, contributing to the continuing development of the M3NHF Schedule of Rates.



Further information on membership and forthcoming meetings can be found at www.nhmf.co.uk



Procurement in practice

Avoiding the pitfalls and getting the best result

A well-run procurement exercise can mean better outcomes for your housing association and your residents. It can help you achieve better value for money and get the results you want more efficiently.

This guide has been written specifically for people who do not have much experience of procurement, aiming to demystify procurement for housing associations, and focusing specifically on maintenance and repair contracts. The book covers:

- the procurement options available and the building blocks you should put in place
- the stages in a typical procurement process
- how and when to involve residents
- insight and views from housing associations and contractors giving you practical advice on how to get the most from your procurement process

For more information and to order visit

www.housing.org.uk/publications

or call

020 7067 1066

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What is CSR?

One definition used by business for social responsibility is: *operating a business in a manner that meets or exceeds the ethical, legal, commercial and public expectations that society has of business*. Another definition is that CSR is about how companies manage the business processes to produce an overall positive impact on society. However you define it, Corporate Social Responsibility (CSR) is a voluntary initiative of businesses, primarily corporate and multi-national companies.

It has grown in importance as companies recognise that they will no longer be allowed to maintain the status quo of solely pursuing large profits and increasing a year-on-year return for shareholders. There is now a complete CSR industry, companies invest in communities and care for the environment. The general public and government practices are demanding that businesses consider ethical, governance, social and environmental issues as business issues.



At a fundamental level, CSR involves going beyond looking solely at how to make the most money, to include a wider commitment to building a better society. This can either be through their actual business practices, or through “extracurricular” activities such as charitable donations, or staff volunteering projects. CSR is often a reflection of

the shared values of an organisation and may be driven by public pressure, employee interest or strategic decision-making by the board. Whatever the motives, CSR has become an invaluable part of marketing and public relations. The challenge for many organisations and their managers is how to have CSR brought into their business at no extra cost and not to appear superficial and calculating.

“At a fundamental level, CSR involves going beyond looking solely at how to make the most money to include a wider commitment to building a better society.”

When it became law on 8 March 2012. The Public Services (Social Value) Act 2012 put a focus on social value and embedding CSR policies through public sector procurement. From 31 January 2013 the Act was ‘live’ and commissioners and procurers must adhere to it. <http://www.legislation.gov.uk/ukpga/2012/3/enacted>. The Social Value Act means that when a public body chooses to award a contract, it looks at what the collective benefit is to a community. The aim of the Act is to rebalance a marketplace that currently favours large organisations with the need to put a value on the knowledge, expertise and local connections of smaller, community-based social enterprises.

The Social Value Act provides an opportunity for organisations to consider how they deliver and embed social value and their CSR strategy. Housing associations are looking for more and



Helen Scurr, (Partner Ark People & Communities)

more of their services to be delivered through social enterprises. In 2014 it is anticipated that we will see more collective and collaborative working, comprehensive reviews of service requirements as well as clearer performance, monitoring and assessment. The big growth area is that of social enterprise opportunities, and through these the creation of greater local partnership working, community growth, career opportunities and savings on service delivery.

Ark People and Communities have supported a number of businesses in the creation of their own social enterprise models, which include a handy person service, training and apprenticeships, grounds maintenance service and a community cafe to mention just a few. The social enterprise model enhances opportunities to maximise training and employment for tenants and residents, and in some instances leaving a legacy of their hard work and commitment at the end of a contract. Social enterprises are supported by various different investment and joint venture models, and there is a variety of funding streams accessible to social enterprise organisations including ESF, Big Lottery and Big Issue, all which support the creation of skills and employment.

<http://www.arkcommunities.co.uk/news/2013-09-18/money-isnt-everything>

Measuring social value

Stephen Russell, Research Manager (Midland Heart)



Background

There is increasing interest in measuring the social value housing associations create. Is this something the maintenance department should concern itself with, or is it an obscure activity that has no place alongside the work of looking after properties?

What does social value mean?

There are many definitions, and terms such as social value, social impact and social return are often used.

For me, the term social value is about ensuring that we can identify and value all of the benefits that might accrue from our activities.

It covers any outcome that may bring value to an organisation, our customers and potentially other stakeholders.

To maintain

We often talk about the **cost** of repairs and rarely about the **value** of this activity. Many performance targets cover reducing cost and the need to be top quartile performers.

We know that repairs are always the most significant factor affecting customer satisfaction and the biggest budgetary spend. In addition to protecting the asset value and the income stream from our properties, maintenance can also bring additional social value to our customers.

For example, the energy efficiency of our homes can impact on fuel poverty, and where houses are not maintained effectively it can have a negative impact on customers' health and general wellbeing.

Some evidence to back this up

Last year HACT published ground-breaking research in this area, looking at housing factors that impact negatively on life satisfaction for people living in these homes.

The research showed that the dominating factor is clearly neighbour noise. Of all the housing problems, neighbour noise has the largest negative effect on both life satisfaction and happiness. Other detrimental factors included damp, poor lighting, not having a garden.

Another interesting finding was that the reasons people give for wanting to move house do not necessarily match with the housing factors that actually affect our life satisfaction. In other words,

“Social value is about ensuring that we can identify and value all of the benefits that might accrue from our activities.”

we are not very good at predicting what will actually affect our experiences of living in a home.

The research goes one step further in using the latest statistical techniques to place a monetary value on these housing problems in terms of their impact on wellbeing (i.e. the social value). This tells us that it would take £1,068 each year to compensate the average person for living with neighbour noise or damp.

So what can we do with this?

Social value measurement is still an emerging field, but significant progress is being made. If we can begin to put figures on the social impact of our maintenance activity, we can also begin to use this for decision making in several ways:

- Compare and prioritise options for different programmes of works. For example, we can compare the impact of a programme to reduce neighbour noise against one that is expected to address damp issues
- Check if the benefits of a programme outweigh the costs
- Ultimately, we will be able to communicate and recognise the value of maintaining properties over and above the protection of asset value and income stream

To finish

The maintenance of properties is more than repairing them in the most efficient way. The home has a big impact on people's wellbeing and therefore maintenance programmes should consider the social value of their activity.

As described here the data and techniques to help with this are now becoming available and we can start to move the debate on, from how to measure social value to how best we create social value.



Japanese knotweed

Phil Cox, Sales and Business Development (PBA Solutions)

You have to feel for them. They call us having been up half the night with worry; you sense they're on the verge of cracking up. They can't think straight, they can hardly string a coherent sentence together. But even though the noises coming down the wire are a tangled mess of half-uttered curses and whimpers, we know exactly what to say...

"So you have Japanese knotweed and you want to sell your house but the bank has said no?"

"Uh um, n..... yes".

"No problem, let's get you sorted out."

"Uh uh r, r, really?"

"Yes, really."

Japanese knotweed is, for some people, the work of the devil. It can, and will, reduce the value of a property, send potential buyers running and even provoke trained chartered surveyors into making statements such as, "Yes Mr Smith, there's knotweed in the rear garden - I wouldn't go near this one if I was you." Helpful.

The thing is, despite its fearsome reputation, Japanese knotweed can be dealt with, controlled and even eradicated. And even though the devil may have been involved somewhere along the line, we don't use holy water, just herbicides.

Some facts.

Japanese knotweed is not a notifiable weed. It is however, when dug up, classed as controlled waste, along with the soils surrounding it up to (by the letter of the law) seven metres from any visible growth.

Japanese knotweed can cause structural damage to built structures, including the homes we live in, the paths we walk, the roads we drive, the car parks we... you get the picture. Walls can be pushed over by knotweed crown growth. Foundations can be ripped apart. Sheds, conservatories and fences can literally be pulled down to the ground. Tarmac car parks? Mincemeat.

However, all of these mini-dramas are very uncommon. Knotweed will, like any plant, take the line of least resistance when seeking out water and nutrients. It doesn't want to tear your house down.

Identification is relatively easy - I'm not giving you a written description and photofit of the perp here; you have Google for that.

Japanese knotweed is not a fussy eater (pretty much any soil type will do). Its root system is extensive (think icebergs) and it is relentless. It must also suffer growing pains; 10 cm of vertical growth a day is not unheard of.

Last fact; young Japanese knotweed is edible (come on let's all get together and chew it out of existence).

"They call us having been up half the night with worry; you sense they're on the verge of cracking up."

Knotweed can be excavated and removed (at a price) when it's really necessary, or controlled and remediated through a properly structured management plan using herbicide treatments. These two methods are often used in parallel. Additionally, expert installation of a decent root-barrier can add that final nail in the coffin for the knotweed.

Perhaps the most important element in a planned assault on Japanese knotweed is time, or rather, a timely response. The longer knotweed is left to its own devices, the higher the cost of treatment, removal and repairs to damaged property. The chance of receiving a 'business-like' solicitor's letter from an aggrieved neighbour also rises while you delay decision making. Recent studies by the world's leading brains have lead to this being expressed thus;

$$£ = n(JKm^2 \times T^3)$$

where 'n' = number of properties/owners affected and 'T' = time. This is known as the General Theory of Knotweed Relativity.

Bringing in some experience and expertise at the right time can save you a packet in the long run, help maintain good relationships with other property owners and prevent loss of asset value.

So, if you're ever worried by the thought of knotweed wrecking your budget, you know what to do.

(Optional) Eat the knotweed, or, if you don't like the taste / you tried 1. and you are now full, 2. call in a PCA accredited specialist without delay.



M3NHF SCHEDULE

M3NHF Schedule of Rates Version 6.2

David Miller, Director (Rand Associates)



During the past year Rand Associates has been working on a major upgrade of all of the M3NHF Schedules of Rates, including the 22 specialist modules and the NHF Form of Contract 2011.

The nature of the upgrade is that all modules have to be reviewed at the same time, owing to the interdependency particularly of the Forms of Contract, the Invitations to Tender and the Technical Specifications.

The upgrade has arisen as a result of:

- Changes in legislation
- Additional contract clauses and preliminary items arising from procurement requirements
- Implications of e-tendering
- Changes in evaluation procedures
- Requests for additional SOR items
- Additional measurement rules
- Clarification on measurement rules
- New specification of workmanship and materials sections

The Facilities Management Schedule which utilises TPC 2005 as its contract, is also included in the version 6.2 upgrade.

David Miller's presentation slides on version 6.2 entitled "Further moves into the 21st Century - What's new in the M3NHF Schedule of Rates version 6.2" are available at www.nhmf.co.uk for further background information.

New documentation for 2014

TPC2005

It has become clear that in a number of different situations subscribers to the M3NHF Schedule of Rates would find it helpful to have a TPC 2005 "Front End" bespoke M3NHF SOR Document with versions for each of the main groups of modules. This was originally proposed by David

Mosey of Trowers & Hamlin LLP, the author of the TPC form of contract.

In conjunction with the Steering Board of the ACA TPC 2005, Rand Associates are developing this version of the M3NHF Schedule of Rates documentation for release later in 2014.

The Steering Board has been commissioned by the UK Government to undertake a number of reviews of different partnering contracts, their use in contracts and the potential for savings by collaborative working, and they have already reported on four projects, using NEC3, TPC 2005 and PPC2000.

The Steering Board consists of representatives of Trowers & Hamlin, Shane Hughes of Savills representing consultants and Anthony Silk, Group Property Services Director for Amicus Horizon representing the clients.

TPC 2005 is a very brief form of partnering agreement, requiring the addition of a number of additional contract clauses and documentation. Rand Associates has experience of incorporating TPC 2005 into procurement documentation, and it has been accepted by the Steering Board, that the M3NHF Form of Contract is much more comprehensive than TPC.

The intention is that a version of the M3NHF Documentation be replicated in the TPC Format, e.g. Invitation to Tender, Preliminaries etc become part of the Term Brief, certain contract clauses of the M3NHF form of Contract will become standard additional clauses, and others optional/variable additional clauses dependent upon the type of procurement being undertaken.

Price per property

The National Housing Maintenance Forum (NHMF) and the NHMF Contractor Forum have requested that Rand Associates Consultancy Services, in conjunction with Anthony Collins Solicitors LLP as the legal advisers to the NHMF, prepare a version of the NHF Form of

Contract and The Invitation to Tender Document to cater for the procurement and management of contracts to be let on a price per property and price per void basis.

The documentation will be based on the NHF Form of Contract 2011 (Revision 2:2013) and Volume 1a of the M3NHF Schedule of Rates (Responsive Maintenance and Void Property Works) Version 6.2.

The concept of PPP/PPV has been around for several years, being based on the historical use of 3 star all inclusive contracts for Gas Servicing and Maintenance, and is currently a popular form of contract with both clients and contractors.

"During the past year Rand Associates has been working on a major upgrade of all of the M3NHF Schedules of Rates, including the 22 specialist modules and the NHF Form of Contract 2011."

The documentation will be available through M3 in the early part of 2014.



NHMF Study Tour 2014 - Jersey

Study tours have become an established part of the NHMF's annual programme, and in recent years have been successfully made to Liverpool, Belfast, Amsterdam, and in 2012, to Rotterdam in the Netherlands. Each has been valuable in providing opportunities to discuss different ideas for, and the implementation of, a variety of housing projects with those directly involved in their delivery. With the same aim in mind, the 2013 tour visited the Channel Island of Jersey.

There were two main reasons for choosing Jersey as a study tour destination. The first was the work that the States of Jersey Housing Department had done in engaging SMEs during their recent maintenance service procurement; the second was that the States of Jersey are currently undergoing a significant reform of its social housing to facilitate a significant programme of stock reinvestment. A key part of every study tour has been its site visits, and this one was no exception. The States of Jersey Housing Department has a particular problem as a result of the harsh coastal conditions that cause problems for building exteriors. As the island is small, we were able to make a significant number of site visits over the two days, and they all provided a valuable opportunity for knowledge exchange between delegates from the mainland and the local professionals.

The expectations of the trip were that it should provide a chance for the committee members, and other delegates joining the tour, to discuss current topics outside of their official meeting. It was also hoped that it would allow for an exchange of information, knowledge and first-hand experience relating to the challenges facing property services directors in terms of service delivery and asset management. Finally, it was seen as a good opportunity to establish new contacts for future knowledge exchange.

At the beginning of the tour, the group received a number of introductory briefings. Deputy Andrew Green, States of Jersey Housing Minister, accompanied by Mike Porter, States of Jersey Housing Operations Director, gave an

introduction to social housing in Jersey. They detailed the journey that had been made from recognising under investment in the existing stock and the need for more properties, to the present position as well as the strategy for the future.

Bob Staddon, Head of Property Maintenance, States of Jersey Housing Department, told the group that there was a requirement to use local labour on the island and that the only contractors operating on Jersey were SMEs. As part of the tendering process to reprocure the maintenance service contract in 2010, Bob did a great deal of work to make the work streams accessible to the widest possible range of bidders. He provided an interesting insight to this work, and to the subsequent management of the contract.

Stewart Petrie, Safe and Healthy Homes detailed a new approach to gaining access to homes for gas safety inspections that reduced costs and time. Finally, Shaun Aldis, Wolverhampton Homes, outlined the importance of delivering services online, described some recent initiatives to encourage digital inclusion and engage residents through social media.

Towards the end of day one, the group had a tour of the World War II tunnels, which provided a memorable insight into the history of the island and life under German occupation.

The following day, the group undertook several site visits. First stop was to see the refurbishment of the La Collette Flats in St Helier. This is a 15 storey tower block close to the sea. The project set out to improve housing standards for 56 tenants. It was originally planned that tenants would remain in their homes during the refurbishment, however, once the building was scaffolded and windows started to be removed it became apparent that the concrete degradation was worse than originally envisaged. The extent of the necessary concrete repairs meant that residents would now have to be moved out. This decant needed to be carried out swiftly to ensure delays to the original contract were

“This was a busy, invigorating and successful trip which fully met its objectives. Overall it was interesting to see the advantages and challenges of providing social housing in a different environmental context.”



Special feature

negated but it also had to be done sensitively. A decant programme was drawn up and it was decided to increase the scope of works to totally refurbish the flats up to decent homes standard, it also enabled licensed asbestos products to be removed whilst the flats were empty.

The improvements included new double glazed thermally broken powder coated aluminium windows, new balconies and railings, each flat is being fully modernised: rewired with new consumer repositioned to a more accessible location, kitchen and bathrooms replaced, heating upgrades, replacement hot water cylinders and water storage, new front doors, and redecorated throughout.

Externally: new roof coverings, new mains services, and the complete over insulation of the building with: 100mm polystyrene batts fixed to the substrate, coated with a base coat render with a polypropylene reinforcing mesh, an acrylic primer and adhesive applied to attach the acrylic brick slips, the facing to match the finish of the original bricks as the building is listed. On completion of these works tenants will benefit from homes which are warmer, drier, and cheaper to heat. The improvements in glazing, roof coverings and insulation will improve the buildings energy efficiency.

Another problem being cured is the spalling of the concrete frame, due to the corrosion of the internal steel reinforcement. This appeared to be fairly localised, mainly to the corners of the frames sections. The affected corners are removed for a length of around 600mm to 800mm the corroded section of reinforcement bar is cut out and a new section bonded in and resin coated, before the new composite mortar mix is applied to resection the frame. The project started in September 2012, with a contract duration of 72 weeks and a value of £4 million.

Next the group visited Pomme D'or Farm which was constructed in 1974 and 1977, providing 86 accommodation units on the outskirts of St Helier. The refurbishment was to a low CO2 producing building, and the non-economic factors of the lower environmental impact of refurbishment versus new build, as well as the social impact were considered to support the project as a sustainable option. The buildings are now fully occupied and the residents are enjoying the benefits of the refurbishment. This refurbishment received a sustainability award from the Jersey Construction Council.

The group then saw a WWII bunker built between May 1943 and March 1944 at Noirmont Point on the Atlantic Wall, and enjoyed a private tour and talk by Ian Chatterley, a local historian.

A visit to La Marais High rise, a project delivered by the Planned Maintenance Team, allowed the group to see a refurbishment attended to

the degradation of the exterior cladding, which had become discoloured, not least because of pigeon and seagull guano. The scheme included improvements in bird deterrents, as well as a complete overhaul of all windows and the encapsulation of external bin shutles. The exterior decoration used a nano quartz technology in a high silica paint system.

Finally, the group visited a new build at Le Squez in St Clements. This was an attractive new project on the site of a collection of 1960s low rise blocks. The aim was to provide better quality homes, and create a strong community on the housing estate, by making some significant social and environmental improvements. More than 100 old houses are being replaced with 137 new ones. This is the first phase of the project which, if planning permission is granted, will be extended to the replacement of the remaining 1960s properties with their inherent faults. It has so far proved popular and the new homes were quickly let.



This was a busy, invigorating and successful trip which fully met its objectives. Overall it was interesting to see the advantages and challenges of providing social housing in a different environmental context, and to discover how different that context is despite being so geographically close to the UK.

Taking control of specification

Dave Woods, Homes and Investment Director (First Choice Homes Oldham)



First Choice Homes Oldham is a stock transfer organisation that took control of just under 12,000 properties from Oldham Borough Council in February 2011. We have an investment programme which will see £149 million invested in our homes up to 2016 with no Government funding, which puts more pressure on how far we can stretch our pound. The customers want the best possible products for their homes, and I challenge my team to consider innovative ways of meeting our customers' aspirations, learning from all industries, not just the housing sector.

The challenge faced by social landlords when specifying products and suppliers has always been a balancing act between cost and quality. The turbulent financial times we have all faced during recent years have brought both challenges and opportunity. The ability to improve the quality of product without it costing the earth is what we strive for on a daily basis to ensure we achieve value for money. As an industry we have an excellent track record of sharing best practice, and take great pride in sharing success stories with our peers. However, we must remember that the financial climate has had an impact on all aspects of the construction and maintenance industry, both supply and delivery, and not just in this country but right across Europe. This has created an opportunity to consider new markets that suppliers may not normally service, and that consumers may have not seen as an option in the past.

As a social landlord, investing in our assets to meet our customers' needs, and then protecting that investment, is a perpetual merry-go-round. Our product is providing good quality

affordable housing, and our assets (customers' homes) need to be maintained and updated. Therefore unlike other industries that may be in position to stop spending in difficult times, we do not have that luxury because our stock then deteriorates and we find our customers look for other housing options. We will look to reduce our expenditure, extend the life of existing products where possible, and ultimately stretch our pound that little bit further, but turning off the tap to invest and protect is never an option.

When times are difficult, suppliers look to broaden their markets, so surely we should do the same? If we consider other industries

“While as an industry we have well established supply chains and many high quality products, the more we challenge our supply chains and look outside our own industry the greater the opportunities for innovation and improved value for money.”

such as hotels and leisure, their products and services need to look their best to keep their customers; isn't that what we want? The products they use in their buildings need to be hard wearing and of a good quality; isn't this what we need? However, we would often consider these products as expensive or unsuitable for our requirements; but is that really the case?

While as an industry we have well established supply chains and many high quality products, the more we challenge our supply chains and look outside our own industry the greater the opportunities for innovation and improved value for money. Life cycle costing and the ability to reduce maintenance costs are paramount to improving our value for money, and suppliers will often strive to help us achieve this key requirement. The only word of caution here is that we must never forget that we are the client in this transaction and our business is as important to our suppliers, as our tenants are to us. Our challenges will set the standard, and considering how others gain value for money will benefit us, our customers, our supply chain and other industries, who in the past may not have considered the link between the product we provide and theirs.

As an industry we spend billions of pounds every year on maintenance and improvements, and as a sector value for money has never been higher on the agenda. So while this may all be common sense to you, and your organisation may already be considering what you can gain from other industries or indeed them from you. If we all consider the opportunities outside our industry and continue on our collaborative approach across our sector, this will surely bring opportunities and benefits to us all?

Asset management: the magic answer

James Sparrow, Executive Director (Savills)



Having committed to give a talk at the NHMF Maintenance Conference entitled 'The magic answer to asset management' I realised that I had better look for the magic answer myself.

It proved an interesting challenge and demonstrated just how varied people's approach to asset management is. In the 'old world' pre-credit crunch, when we lived in the land of plenty, there was no real imperative for a true asset management strategy for many organisations. There was a major focus on meeting Decent Homes, often at the expense of really understanding whether the investment was appropriate. In the new world things have changed. There is less funding available, grant for new build is limited, Decent Homes is largely history and for these and many other reasons there is now a major imperative to have an active asset management strategy.

To manage your assets effectively it is necessary to understand how they are performing and what it is you are trying to achieve. The answer will have more than one element but will certainly include the corporate objectives of the organisation, the sustainability/energy agenda, value for money, maintain existing versus build new, business plan affordability, tenants aspirations and life after Decent Homes.

In terms of understanding the performance of the assets, stock investment data is a key driver in any asset modelling and to understanding fully the short and long term repairs and investment requirements of properties. Robust stock condition survey data is critical in this regard. Other key drivers relate to management costs, void property information and rents. Disaggregation of management information to understand how different property groups are performing within a portfolio is often more difficult than envisaged.

Assuming all this information can be brought together, it is then possible to undertake various modelling to understand how properties will perform in the longer term in a cashflow sense. From this the organisation will be able to identify which properties will be cashflow positive and which will be cashflow negative.

Following this initial financial modelling other factors can be overlaid to give a more holistic approach to asset management. Modelling measures such as income deprivation, popularity of an area, management issues, health, employment and educational achievement are all key factors. Energy and sustainability factors can also be added to the equation.

Once this modelling is complete an asset management strategy can be developed.

“To manage your assets effectively it is necessary to understand how they are performing and what it is you are trying to achieve.”

Options can be considered for properties that are no longer viable. Many housing associations have been looking at this over the last five years and there has been a huge programme of stock rationalisation. This has been a great success for the organisations concerned and they have recognised that working on the basis of retaining all properties for ever is clearly not sensible.

So in conclusion, there is of course no silver bullet solution or magic answer to asset management – the reference to magic answer was fraudulent on that basis, but there is a way through the mist if the basic steps set out in this article are followed, and you take time out from the day job really to think it through. In the meantime I shall think of my title for next year's talk and will try and avoid any reference to magic answers!

Leaseholder challenges: demonstrating value in service charges



Jonathan Cox, Partner (Anthony Collins Solicitors)



Most landlords are familiar with the demands of consulting leaseholders as contained in section 20 Landlord & Tenant Act 1985 (the Act). However, even if a landlord complies, it does not mean landlords are free from challenge. In my Conference Workshop I looked at how leaseholders can challenge landlords, especially on the reasonableness of service charges, and considered what landlords can do best to protect themselves from those challenges proving successful.

The first thing to identify is who, in theory, can bring challenges. These are all shared owners and leaseholders (and many tenants) who pay variable service charges¹. The second thing, is which service charges those customers can make challenges about; this is wider than is commonly thought. The challenges can be about service charges that have already been paid, service charges for which payment is being requested now, and service charges that will be paid in the future.

When any complaint is received there are a few initial checks that must be made since they affect whether a customer can bring a challenge to the First Tier Tribunal (tribunal): -

- Any tribunal will check that there is a **chargeable service**, which means that the lease or tenancy agreement identifies clearly what the service is, has an agreement from the landlord to provide that service (sometimes that might be in legislation) and an agreement from the customer to pay for the service. If there is no chargeable service the customer has no liability to pay. This does not mean that if the customer does not benefit from the service s/he doesn't have to pay - hence the importance of checking what the agreement sets out.
- Whether the customer **has agreed or admitted the item in question** (payment isn't admitting anything). For example a customer might have requested (in writing and agreed by the landlord) a higher standard of work than would usually be the case (say triple-glazed windows to replace single glazed windows). That customer cannot complain afterwards about that decision and anything else that was agreed as part of it (for example a fixed (higher) price).

“When any complaint is received there are a few initial checks that must be made since they affect whether a customer can bring a challenge to the First Tier Tribunal.”

The particular challenges we considered come under the heading of “reasonableness” challenges. To be reasonable, the item must have been reasonably incurred, delivered to a reasonable standard, and any

advance payment must be reasonable. Clearly the most frequent areas of challenge are whether the item has been **reasonably incurred** and whether the item is of a **reasonable standard**.

Whether an item has been **reasonably incurred** is a test in two parts: first, was the action taken by the landlord reasonable; and, second were the costs reasonably incurred. So, in a case about whether it was reasonable to charge legal fees, the first question is whether it was justifiable to take legal advice, and then whether the cost of that legal advice was reasonable. What the test is not about is getting the cheapest service. What is particularly important for social landlords to remind any tribunal is that the landlord will almost always be bearing part of the cost of the item (e.g. in a mixed tenure block where the roof is replaced the landlord will bear the share of the cost attributable to tenanted properties).

The kind of questions landlords should be challenging themselves on not just when challenged by customers but to prevent challenges in the future are:

- | | |
|--|--|
| <input type="checkbox"/> Are (or were) the works necessary? | <input type="checkbox"/> Are the works required at all? |
| <input type="checkbox"/> Are the works sufficient to remedy the problem? | <input type="checkbox"/> Are the works over-extensive? |
| <input type="checkbox"/> Was the original specification adequate? | <input type="checkbox"/> Did the specification allow for additional repairs revealed as the job went on? |
| <input type="checkbox"/> How adequate was the supervision on site? | <input type="checkbox"/> How robust was the contract management in the back office? |

Whether an item is to a **reasonable standard** is a question of fact; here landlords need to be able to demonstrate a process, as standards will vary according to the perceptions and viewpoint of the parties. Landlords may want items which can last for a longer time than a customer considers reasonable; so landlords need to have a process to justify them taking that view which might well include an expert opinion.

It is also worth bearing in mind that if, for example, a landlord has a particularly difficult prospective repair, it can make an application itself to the tribunal to have it confirm its actions will be reasonable, before incurring the expense (and risk). This would prevent a subsequent challenge. This kind of application is especially helpful for large-scale repairs with multiple leaseholders.

In summary, to prevent complaints a landlord has to put him/herself in the customers' shoes. If a landlord then has a complaint it should put itself in the lawyer's shoes presenting a case in the tribunal. And don't forget a landlord can also go to the tribunal.

¹A variable service charge is defined in section 18 of the Act

De-risking retrofit

Dr Peter Rickaby, Director (Rickaby Thompson Associates)



It may seem that low carbon housing retrofit has dropped down the political agenda. However, the work must be done if we are to meet the challenge of climate change. As David Orr said at the NHMF conference this year, it was suggested that Decent Homes was unaffordable, but the industry rose to the £19 billion challenge, reconfigured itself, and delivered the improvements. Decent Homes was just a dress rehearsal for low carbon retrofit, which is more like a £100 billion challenge to the industry, and equally critical.

Retrofit is risky, and housing organisations are notoriously risk-averse. Most recent experimental demonstration retrofit projects have failed to deliver promised fuel cost and emissions savings, and many have encountered technical problems, but some have performed well. Lessons have been learned, and the new discipline of 'retrofit forensics' is collating knowledge from post construction testing, post occupancy evaluation, post construction reviews, monitoring and evaluation, and the '360 analysis' that bring these investigations together. Completed investigations by several agencies and housing organisations allow us to begin to generalise about where retrofit goes wrong, and how to ensure that it goes well.

Retrofit is not rocket science, but it is complex. Retrofit goes wrong:

- At the corners, junctions and edges where building elements meet, and around openings; this is where thermal bridging and air leakage occur
- At the interfaces between building fabric and building services, where systems have to be matched to heat loss and air permeability
- At the interfaces between building systems and people – when designing, installing, commissioning, handing over, using and maintaining retrofitted homes

Currently, the weakest aspect of retrofit is ventilation. This weakness embraces strategies, designs, products, installation, operation and maintenance. More robust retrofit ventilation products and processes are required.

Retrofit defects are like building leaks: consequences appear in unexpected places, often distant from the source, and there are impacts on building fabric, building services, occupants and building performance. We can manage the risks, but unfortunately the quality assurance system developed to underpin the Green Deal and ECO (PAS 2030 and the certification schemes it embraces) is a false start, because it focuses not on corners, junctions, edges and interfaces but on individual elements and systems, thus preserving an inappropriate, fragmented retrofit process.

The report of the Rushenden retrofit project, by the Institute for Sustainability for the Homes and Communities Agency, is the first of several publications to address these issues. The final report on the *Retrofit for the Future* projects, by the Technology Strategy Board and Energy Saving Trust, will identify many retrofit risks and their linkages. The second edition of the Construction Products Association's guide *An Introduction to Low Carbon Domestic Refurbishment* (an RIBA co-publication) provides 'watch points' for each aspect of retrofit.

“Retrofit defects are like building leaks: consequences appear in unexpected places, often distant from the source, and there are impacts on building fabric, building services, occupants and building performance.”

Overall, we are beginning to understand how to de-risk the basic scale retrofit process (Figure 1) by including self-learning risk management (Figure 2). The improved process involves:

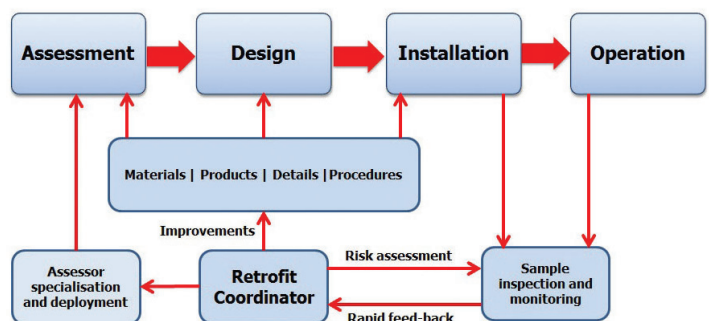
- The deployment of assessors with specialist skills to suit the buildings involved and the measures required
- The continuous improvement of a library of standard materials and products, details and installation procedures. We need materials, products and details developed for retrofit, not adaptations from the new-build sector
- Risk-based targeting of sample inspections and testing, with rapid feed-back to improve materials, products, details and processes
- Continuous liaison between assessors, designers, installers and occupants

Figure 1: Retrofit Process



Figure 2: Retrofit Process

With integrated self-learning risk management



Of these processes, liaison with occupants is by far the most critical. Together, these processes define the role of the 'Retrofit Coordinator', an expert retrofit project manager and occupant liaison officer for whom formal training is now being provided at the Centre of Refurbishment Excellence (CoRE – see www.core-skills.com).

The financial case for adapting to climate change

Preparing for climate change

“UK housing is projected to experience increased flooding, water stress and overheating as a result of climate change.”

Richard Lupo, Sustainability Consultant (Sustainable Homes)



The floods in January this year were a timely reminder to the sector to take climate change seriously. We must adapt our homes to minimise the damage that the worst effects of climate change can cause. This article will explain

some of the adaptations that can be made, the benefits they bring and explores potential funding avenues.

A useful reference source is a leaflet we produced for the London Climate Change Partnership and is based on a real life case study, where 200 flats were adapted for climate change during a Decent Homes programme¹.

UK housing is projected to experience increased flooding, water stress and overheating as a result of climate change. What are landlords doing to adapt their homes to these changes? SHIFT² data shows that around 20% of landlords had positively identified their stock as being in low flood risk areas. Around 8% had done the same for overheating risk. Average water usage was higher than the Environment Agency recommends, which means that there is a risk of water stress. In areas of severe water stress this means hose-pipe bans and standpipes for residents. Also ecological damage to waterways and reduced irrigation for crops could be affected. All this means that there is still some way to go before our homes are protected.

So what can be done and where can asset managers get funding for works?

The easiest change to make is to install water meters and water efficient fittings in bathrooms and kitchens. With forethought this costs nothing, but will save considerable amounts of water. Installing showers is popular with residents, and hot water saving devices can save a huge amount on energy bills too.

The good news is that the necessary water efficiency can be achieved without resorting to narrow or shallow baths which are unpopular. No specific funding is available for this but water companies have an obligation to reduce water usage so they are often willing partners.

Saving hot water also makes significant reductions in carbon emissions. Treasury attaches a monetary value to carbon emissions reductions. This means there is some scope to make a case for carbon reduction funding.

Flood risk reduction and reducing damage from flooding events are a little trickier to fund. Again, a little forethought can lead to low cost interventions at the right time. For instance during re-wiring ensure that electricity meters are above design flood levels for homes in medium or high risk flood zones.

Maintenance of existing drains is often required. The work could be paid for on a whole life costing basis, taking into account the risk of a flood event happening each year. The costs to a landlord of not adapting to flooding would be significant repair and replacement and temporary housing costs whilst drying out takes place.

The most effective ways to combat overheating are adequate ventilation and external shading.

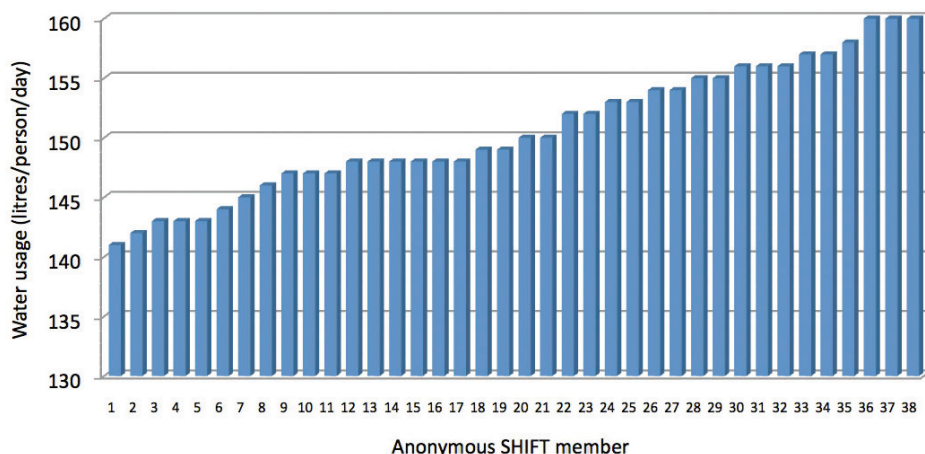
During heatwaves, which are projected to become more frequent, vulnerable people can suffer resulting in hospital admissions. By preventing these admissions, NHS costs are reduced which may lead to an avenue to explore for funding this type of project.

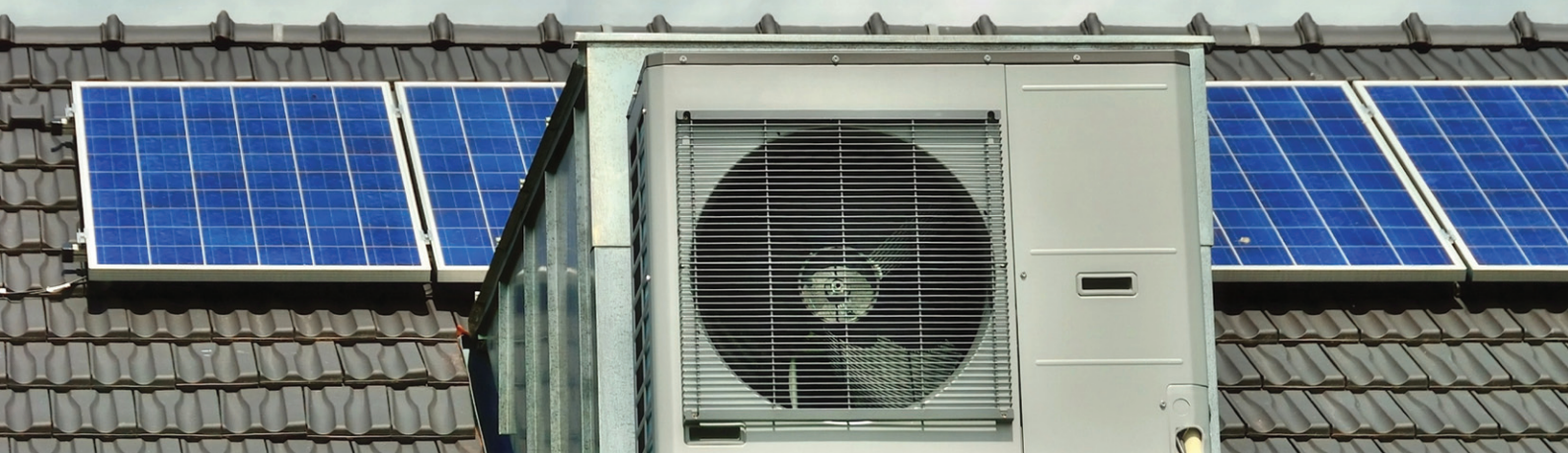
External cladding of walls can also lead to reduced overheating, but not by nearly as much as ventilation and external shading. However, external cladding also leads to affordable warmth during cold periods, as well as reduced carbon emissions and so is a prime candidate for Government funding. Keeping homes warm can also lead to reduced hospital admissions and hence highlight another potential funding source.

Our advice to asset managers is to start assessing the risks that climate change presents to your stock and then make the necessary adaptations to those homes most at risk. The measures pay for themselves, but landlords will have to be creative in seeking the necessary funding.

¹ The Business Case: Incorporating adaptation measures in retrofits, <http://climatelondon.org.uk/wp-content/uploads/2014/02/The-Business-Case.pdf>

² Sustainable Homes Index For Tomorrow, <http://www.sustainablehomes.co.uk/shift/>





Renewable heating in social housing

Mike Trant, Asset Management & Policy Manager (Dumfries & Galloway Housing Partnership)



I am sure you may have heard stories about social housing organisations across the UK that have had bad experiences of all types of heat pumps; Biomass, ASHP and GSHP – *good news travels down the street but bad news spreads all over the town*. The ending is normally the same in that these new “green” systems had to be taken out, or only a small number installed, with little harm done.

Thankfully, Dumfries & Galloway Housing Partnership (DGHP) did not listen to these stories but learnt from our own experiences, and as they say from small acorns forests grow. DGHP now has over 1,187 Daikin ASHP, 17 GSHP and five biomass boilers installed in our rural off gas grid homes across Dumfries & Galloway supplied by the manufacturer Daikin. The main contractor, British Gas (PH Jones), together with a local “green” MSC accredited sub-contractor Coolheat Energy Systems provided a professional, local team supported by our own in-house project team. We were fully committed to providing tenants with affordable warmth and to treating each home as an individual entity as well as providing at the same time low cost energy measures, energy advice and benefit health check.



“How would you and your organisation feel when a tenant tells you that their home feels warm for the first time in over seven years?”

YES is the answer, it was the right project, at the right time as all the people and organisations involved were committed to the project’s success. Success was measured not just in numbers installed, (tenants did have a choice) but satisfaction with the installation and tenants feeling the benefits no matter what their age.

Two small anecdotes; how would you and your organisation feel when a tenant tells you that their home feels warm for the first time in over seven years? Is that not an indictment on us all? A second tenant told me that they felt ashamed to invite family and friends back to their home as it was cold. Now that has all changed and that family feels re-born.

In contrast, more of our rural tenants tell us that their fuel bills have reduced (or have not increased despite increases in fuel charges), and that homes are warmer and drier. The Renewable Heat Incentive (RHI) will give social landlords income (over seven years) for qualifying renewable heating systems, **perhaps now is the time** for rural social landlords across the UK to install affordable renewable heating systems; tomorrow will be too late.

Remember that in Scotland you will need to talk to your local planners as ASHP requires planning approval – oh for one day a joined up Scottish Government – wanting to achieve carbon reduction, less dependent on fossil fuels, greener jobs, affordable warmth and the high hurdle of planning overcome!



To be or not to be... resilient?

Briony Turner, Doctoral Researcher (King's College London)



After far too wet a winter period, finally spring has arrived.

Some of you reading this article may be adding to that list the issues of structural damage, the costs associated with reinstatement, loss of rental income, rehousing/ temporarily housing residents and increases in insurance premiums.

For others, this is thankfully someone else's problem, not yours. However, in the future it might well be, and if it is, how resilient is your stock to climatic events and changes? (See Figure 1).

As social housing providers, you have a stock portfolio. You need to keep the maintenance of it as minimal as possible. You do not want voids or your tenants to have an excuse not to pay their rent. The majority of you, one way or another, also borrow against the value of your stock. So there are many incentives to make sure stock is kept in a condition that maintains its value, albeit with, no doubt, substantial capital restrictions on being able to do so.

The weather is changing. Our stock and the way people expect to live are not resilient to extremes in the external environment. The recent flooding is a case in point.

So, if you will excuse the pun, let us take a stock check on this:

We have a difficult portfolio to deal with - every house is individual, especially when taking into consideration the residents and the ways in which each home is used.

We have climate projections, so we know roughly what is due to happen, and in the past 50 years the Met Office haven't got it that far out so there is no reason to believe they are talking nonsense now.

We also have relevant data - the Environment Agency has recently published surface water, as well as fluvial flood risk maps and in London there is the detailed surface water flood risk data via the Drain London project available directly from the London borough councils. In the UK we also have climate projections that are the envy of many other countries. Not only that, but the likes of the Technology Strategy

Board (TSB) and the Environment Agency have been hard at work to help make these datasets useable by the built environment sector and to illustrate the benefits of doing so (see Box 1).

We have technical information about what can be done - huge amounts of learning recently published from the TSB competition Design for Future Climate, as well as by the National Housing Federation, National House Building Council, recent research findings from the Adaptation and Climatic Resilience Research Network and of course information provided by the professional bodies. These collectively provide the cost-free, the small and the larger measures that can be integrated into stock management strategies, or at the very least, stock risk assessment and cost benefit exercises for consideration of adaptive action, so why is hardly anyone doing it?

Is being reactive really cost effective and cost efficient? As a sector we need to start not just asking, but addressing the question, "What is our ability to cope with, and how can we ensure

we do cope well with sudden, undesirable, and unpredictable, stressful events?"

David Pencheon, Director of the NHS Sustainable Development Unit (England) has in the past, said that, "Extreme events should not automatically be disasters. Deaths from extreme events (such as heatwaves) are not necessarily unavoidable. They should be treated as failures of preparation, planning and partnership until proved otherwise."

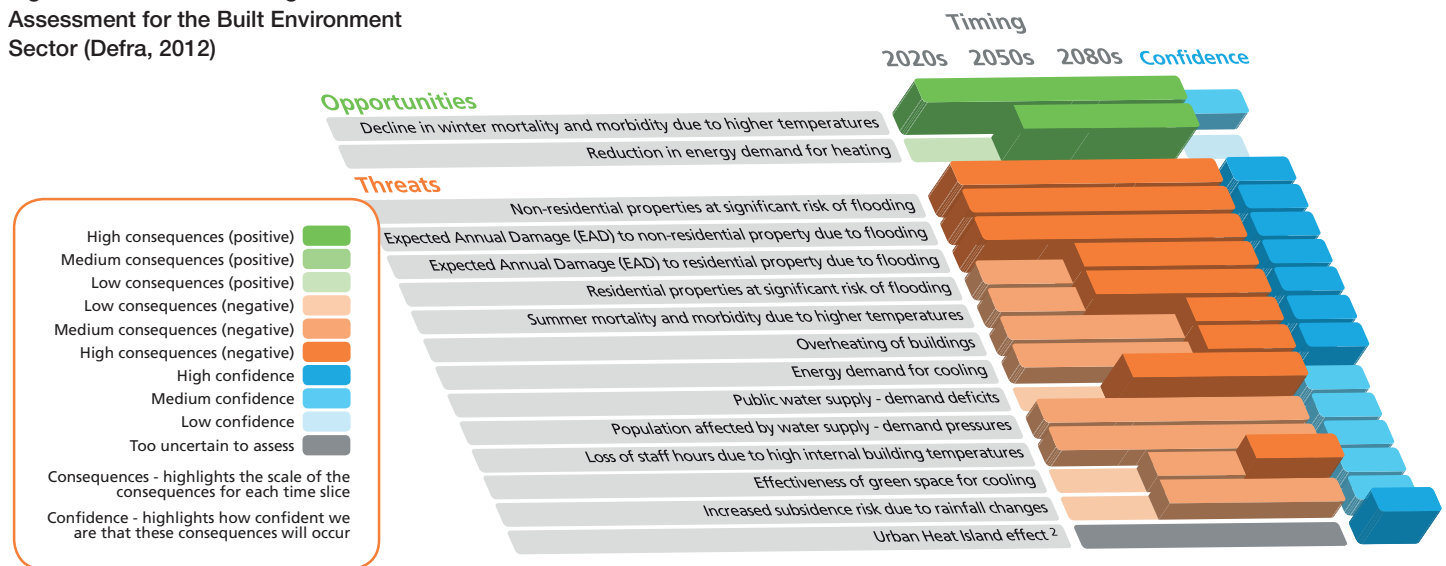
As concluded by Winston Williams, who chaired the NHMF workshop session on building in stock resilience to extreme weather events, "traditionally asset management strategies have been linked to very different outcomes, and now the world has moved on and we need to perhaps go back and revisit our plans for the future in a slightly different way, in a time where climate is going to have a real impact on what we do, how we do and potentially even the value of our stock in the future."

Box 1: The Environment Agency's eight good reasons why you should consider climate change in your management and business planning

- 1. Ability to deliver services irrespective of the weather** - good for reputation and business continuity
- 2. Planned change is more cost effective and less expensive than last minute, reactive actions** - some actions e.g. policy/procedural change don't require capital.
- 3. Competitive advantage** - identify new opportunities and challenges, don't be at a disadvantage compared to others in your field.
- 4. Decision-making on the basis of historic climate is no longer advisable** - average conditions are changing as well as the frequency of extreme weather events, so if you are using historic data you are likely to **be caught out**
- 5. A degree of climate change is now unavoidable** - no matter how successful we are in reducing greenhouse gas emissions
- 6. Improve your coping capacity** - making changes now helps you to cope with current extreme weather events as well as future changes in the climate
- 7. Anticipate the decision-making requirement** - insurers, investors and Government increasingly require that climate change be taken into account in decision-making
- 8. Future-proof your business decisions** - for example, consider where you locate new premises to reduce the risk of flooding, and construct them to cope with higher temperatures. If you are dealing with a weather related emergency, you need your staff to be able to do their jobs.

Adapted from the Environment Agency's Climate Ready website

Figure 1. UK Climate Change Risk Assessment for the Built Environment Sector (Defra, 2012)



A fuller version of this article with useful links and references can be found at www.nhmf.co.uk

Top tips for integrating resilience planning into asset management strategies

- **Use the free “Business Resilience Health Check” tool developed by Climate UK and the Environment Agency** - it takes about 15 minutes to complete and is useful just for checking basic regulatory compliance
- **Don’t start from the assumption your stock needs improvement** - Make sure you have good baseline data; stock condition data and local microclimatic data
- **Consider the ‘inertia of the built environment’*** - Building stock can have long lifecycles and during that timeframe climatic and lifestyle changes may well already be known/projected. So test the likely response of your stock portfolio in its current state of repair to future scenarios. You may well need to commission environmentally responsive and climatically resilient design (check your new build design has been modelled against summer as well as winter temperatures) and check that energy usage and waste energy from appliance usage assumptions are reasonable.
- **Consider changes necessary to Business As Usual** - Think through your BAU implementation and look at what processes will need to change and the knowledge requirements/changes associated.
- **Consider what the adaptive capacity is of each organisation that will need to be involved and what support you need and can provide**
- **What RSLs can do in addition to modifying/adapting homes:**
 - Know where your most vulnerable residents are
 - Think about your housing strategy
 - Identify stock at highest risk of overheating, avoid housing vulnerable populations in it
 - Make sure you have a defined communication process you can quickly implement when a severe weather event, be it excessive cold, a storm, flooding, or a heatwave is predicted and in progress.

“The weather is changing. Our stock and the way people expect to live are not resilient to extremes in the external environment.”

Helpful resources:

Adaptation and Resilience in the Context of Climate Change Network <http://www.arcc-network.org.uk>

Business Resilience Health Check Tool <http://www.businessresiliencehealthcheck.co.uk>

Climate Ready Guidance on adapting to climate change using a business continuity management system. <http://www.bsigroup.com/en-GB/forms/Adapting-to-Climate-Change-using-your-Business-Continuity-Management-System/>

CREW research project produced a useful tool to look up home type, floor level and find the best package of measures that work for adapting to expected warmer temperatures and heatwaves as well as help reduce energy usage during winter months. <http://www.iesd.dmu.ac.uk/crew>

NBS articles on climate change adaptation in buildings

<http://www.thenbs.com/topics/environment/articles/Climate-change-adaptation-in-buildings.asp>

NHF Managing your Assets guide that contains advice on building in climate change mitigation and adaptation into refurbishment programmes

NHMF best practice award winners 2014

Project of the year

Winner: United Welsh, Celtic Horizons and Mears Group

united
welsh

celtic
horizons

MEARS

Making People *Smile*

Complete property service

United Welsh, working with its partners, developed a model that reduces the tenants' journey, improves service delivery and introduces new concepts including the Complete Property Service, a creative lean working approach to improve efficiency and maximise resources by:

- Performance measurement through KPIs and feedback
- Innovative price per property/price per void model
- Targeted recruitment and training
- Priority classification
- Flexible appointments
- Dedicated call centre



Judges comment

This was an excellent submission. Liked the fact that they contacted residents within 30 minutes to confirm the job was completed satisfactorily.

Best client

Winner: Golden Gates Housing Trust

Communities together

Golden Gates Housing Trust (GGHT) is the largest provider of social housing in Warrington, Cheshire.

Following its transfer in 2010, the trust has invested heavily in growing its services and developing the skills of its workforce. For example giving accreditation to carry out solar PV installations.

The trust has used its expansion to create a wide range of new employment opportunities, all targeted at its customers and local communities. In total they have recruited an additional 30 operatives, ten apprentices and 34 trainee posts.

Judges comment

Great employment opportunities for residents and good use of investment.



Best small client

Winner: Golden Lane Housing

A new approach to asset management

Established by Mencap in 1998, Golden Lane Housing was formed to provide quality housing and support for vulnerable people. Golden Lane Housing has a responsibility to look after over 560 properties across the UK. It has embarked on changing its approach for asset management.

Golden Lane Housing says, "our repairs service is not like other people and is unique in that every repair is treated in its entirety, we base our decisions on what is best for the tenant."

Golden Lane Housing has partnered suppliers, contractors and IT specialists to develop this for their customers. It bases its service on customers and staff are selected for their passion for this work area.

Judges comment

Great that it has got to grips with the service while continuing to look at each property and client.



Golden Lane Housing

working in partnership with **mencap**



Best contract

Winner: East Kent Housing



Super ALMO provides a super contract

Canterbury, Dover, Shepway and Thanet Councils collectively considered how they could deliver a streamlined cost effective maintenance service.

They took tenants of 17,500 homes, over 200 staff, and a diverse political background with them, into the first Super ALMO, that is East Kent Housing.



Judges comment

Liked the use of the communities plan that was developed with the contractor, the sharing of services showed considerable savings for the four councils and the project demonstrates continuous improvement.

Best in-house maintenance service provider

Winner: Viridian Housing



In-house planned maintenance

Viridian Housing has developed an innovative, cost effective in-house solution to deliver its planned maintenance programme. This solution provides the following benefits for their customers and Viridian:

- High levels of customer satisfaction
- Some of the lowest costs for planned maintenance in the sector, benchmarked independently
- It creates and offers work to local people living in the areas served, 50% of its technicians come from these neighbourhoods



Judges comment

Really liked this entry, innovative approach with good results and well evidenced.

Most improved asset management service

Winner: Bournville Village Trust



A window to the future

Bournville Village Trust is a housing association established in 1900. Throughout its history the trust has continued to build and extend the reach of its estate. As a result, its stock profile is diverse. A proportion of its estate is listed or subject to Local Authority Conservation Department regulation. This makes changes to external aesthetics a complex process. It has developed strategies to deal with these challenges to ensure its customers live in quality homes.



Judges comment

Provided an excellent approach involving the customer throughout the process resulting in high satisfaction with the end product.

**AWARDS
2015**

NHMF BEST PRACTICE AWARDS 2015

Proud of yourself? Entering for the awards is a great way of focusing attention on what you do best. It is good for the morale of your maintenance teams, and promotes the work of your organisation. Sharing your projects contributes to the knowledge base created by the NHMF.

Applications for the NHMF awards 2015 are now open and a shortlist will be published on the website in January

www.nhmf.co.uk/awards

Affordable water for affordable housing



First Wessex

Neil Sephton AIEMA, Green Living Senior Advisor (First Wessex)



Setting the scene

First Wessex's estate of over 20,000 homes, predominantly in Hampshire, has been in an area of water stress since 2007. Supply of this essential resource is often taken for granted, and its conservation clearly important. Excluding our commercial use, residents consume approximately seven million litres per day, and there is a need to reduce this consumption and save this precious resource.

Environmental

Supply is vulnerable; a difficult claim after the wettest winter on record. Climate change is likely to see temperatures rise 2C-3.5C by 2080 with rainfall in South East England reducing by up to half. Droughts like those in 2004-2006 are likely to be more common. Rainfall recharging aquifers which provide 70% of our supply are less predictable and licensed abstraction is increasing.

DEFRA's target is to reduce water use per capita to 130 litres per day by 2030. To achieve this demand management and efficient water use is required.

Social

Meter installation for new builds were introduced from 1990 and compulsory retrofits are here:

- Southern Water (commenced 2010 = 40%, 487K meters by 2015 = 92%)
- South East Water (commenced 2001; 200K meters by 2015 = 70%, 2020 = 90%)
- Portsmouth Water (under certain conditions, target of 5K per year)

Metering reduces consumption 10% but links between consumption and bills is often weak.

Economic

Switching to metered charges often doubles bills; challenging during welfare reform. Larger

households are typically more water efficient per head, but a financial squeeze on households over two or three persons is common. Average metered bills per household £390 per annum. based on five people using 504 l/p/d could be £670 per annum. by 2030. NAO predicted above inflation cost increases for utilities for 17 years (2013-2030).

Green Living advisor service

Free visits to residents provide water, energy and money saving advice and devices:

- Flush bags: reduce flush by one litre plus, selected according to cistern volume
- Aerators: reduce tap flow to five litres per minute; saving energy if hot water
- Shower heads: efficient below eight litres per minute, flow dependent on shower type; combined with timer huge savings possible

'Baby steps' toward savings are better than no steps, whilst linking choices to bills. Signposting provided for water debt and other assistance.

Energy-water saving case study

Typically, 25% of a domestic energy bill is for sanitary hot water (Energy Saving Trust).

A Hampshire family of four saved £1.90 and 385 litres per day through behavioural change. The 9.5kW electric shower was water efficient at four litres per minute, although total shower times were 150 minutes per day. Reducing total shower times to 70 minutes per day saved 107m3 water (£342 at £3.20/m3) and 4,219 kWh (£632 at 15p/kWh) on occupancy of 333 days per year.

The customer lacked understanding of how energy intensive showers are. A five minute shower timer was refused, so potential for further large savings remain.

Rainwater harvesting

Low viability for retrofit at £3.5-4K per home, but code requirements to reduce consumption require options. Supply substitution permits

greater flow rates, but can be 40% more carbon intensive to install than mains water. A Hampshire case study showed reduced potable water use of 35%.

Grey water recycling

With Southern Water we are piloting ten Reaqua systems, to be monitored over two years. Basic set-ups reuse bathing water for toilet flushing, with optional heat recovery. Piloting coincides with bathroom replacement, targeting larger homes.

Office audit and adaptation

Our Eastleigh Office has 115 staff and uses 800 m3 water per year. A water audit was undertaken with Southern Water and cost-effective measures are to be retrofitted. Monitoring of savings and staff satisfaction is crucial. We'll produce a commercial water saving case study encouraging other businesses to replicate and save. South East Water and Portsmouth Water have expressed interest in similar projects.

“Supply is vulnerable; a difficult claim after the wettest winter on record.”

Summary: the choice

Simply put, we all have a choice. This is the name of the First Wessex sustainability strategy, showing our commitment to a more sustainable future. The underpinning action plan sets out how we will do this, both internally and with our customers. What ever the resource, be it water, energy or materials, drop-by-drop every little helps.

Developing a winning strategy for safety

Health and safety

“Unless you have an integrated and fully resourced health and safety management system in place the small stuff will get you.”

Roslyn Perkins, Assistant Director, Facilities and Safety (Peabody Trust)



How do you weave health and safety into your strategic thinking?

A guide produced for directors and board members by the Institute of Directors in alliance with the HSE is a good starting point.

If you read the guidance and implement some of the excellent ideas into your business, you will get results. The guidance poses some strategic questions and identifies a step by step process to implement a safe system of management. This, in simple terms, forms the process of plan, do, check and act.

Plan

- Integrate safety into the main corporate governance structure – risk and audit committees etc.
- Make health and safety a standing agenda board item
- Appoint a board member as director or lead director for health and safety
- Set clear targets for organisation and for directors (can be linked to bonus system!)
- Utilise non exec directors as scrutineers

Do

- Ensure adequate resources and management systems are in place
- Ensure there is competent advice (preferably internally based unless very small operation)
- Ensure risk assessments are completed, up to date and disseminated to relevant employees/contractors
- Ensure good procurement standards are in place as well as ongoing contract management

- Implement health and safety training for board members – use someone suitable for their level

Check

- Periodic audits of the management structure and risk controls
- Consider impacts of changes e.g. potential mergers and acquisitions, new contracts etc.
- Monitoring data – leading and lagging data for example a scorecard for safety
- Benchmarking – look at best practice in the sector and beyond

Act

- Ensure the health and safety policy reflects current business plan priorities and objectives
- Ensure there is effective reporting to the board – annual reports, quarterly or six monthly reports
- Ensure board members are present on the ‘shop floor’ from time to time

What are the critical issues for directors of asset management in social housing?

The ‘big five’ risks that you should have clear, implemented and resourced policies on are:

- fire
- asbestos
- contractor management including CDM
- maintenance
- staff, volunteer and resident safety

But of course unless you have an integrated and fully resourced health and safety management system in place the small stuff will get you; remember that the majority of accidents are in the very banal category of slips, trips and falls!

Can you sleep at night?

Ask yourself as senior manager, directors and board members the following questions and if you can answer positively them sleep well! These questions were devised by the HSE.

1. Do I know when the last fatality, life altering injury or catastrophic event occurred in my organisation and the names of the victim(s)?
2. Do any of my behaviours as a leader suggest, even unintentionally, that fatalities or injuries are acceptable and part of doing our business?
3. Do any of our systems or processes suggest, even unintentionally, that fatalities or injuries are an acceptable part of doing business?
4. Do our systems and processes help us comply with the spirit of the law to protect the health and safety of our people or are they there simply to demonstrate compliance with the letter of the law?
5. Can I list and describe the main sources of potential or previous harm or damage?
6. What leading metrics do we track to ensure that our injury prevention mechanisms are robust?
7. How do we know whether we are building strong safety leadership at all levels and creating a good safety culture?
8. Does the company maintain a sense of vulnerability to accidents or is it becoming complacent?

Where does the fire safety buck stop in your organisation?

Jan Taranczuk, Vice Chair (CIH London Board)



It is 12 months since the Rule 43 letters were issued after the Lakanal House and Shirley Towers inquests. A Rule 43 letter is issued by a coroner in order to highlight issues raised during an inquest and to prevent future deaths in similar circumstances. Unusually, the Southwark Coroner issued four letters to various parties including the London Borough of Southwark. The Coroner for the Shirley Towers Inquest issued a Rule 43 letter and quoted a previous Rule 43 letter that was issued in Stevenage following an Inquest into the deaths of two firefighters in 2005.

“Where does the fire safety buck stop?”

The recommendations from the coroners are summarised here:

- Show new tenants the fire safety features of their dwelling and of the building generally
- Provide residents with clear guidance as to how to react if there is a fire in the building
- Ensure that signs in common parts of high rise residential buildings are sufficiently prominent and provide useful information
- Provide clear information to residents to enable them to find escape routes
- Liaise with the London Fire Brigade regarding use of premises information plates and boxes

- Review policies and procedures concerning fire risk assessments of high rise residential buildings
- Consider the skills and experience needed to undertake an assessment of higher risk residential buildings
- Consider the training required for members of staff considered to be competent to carry out assessments
- Identify when individual flats or maisonettes should be inspected and how these should be selected for inspection
- Ensure that assessors have access to relevant information about the design and construction of high rise residential buildings and refurbishment works carried out to enable the assessor to consider whether compartmentation is sufficient or might have been breached
- Consider the training needs of personnel who will be involved in procuring or supervising work to existing high rise residential buildings – whether maintenance, refurbishment or rebuilding of parts of buildings
- Liaise with emergency services to consider access for emergency vehicles to high rise residential buildings, having particular regard to obstructions such as vehicle parking in locations which emergency services might need to use
- Consider the question of retro fitting of sprinkler systems in high rise residential buildings
- Remove all surface mounted plastic trunking/conduit used to protect and support the fire alarm and automatic fire detection system in the common areas of all premises

Has your Board or SMT considered these recommendations, together with a gap analysis that identifies what still needs to be done? Have you shared that information with your residents' scrutiny group?

We should all know by now, that the “Responsible Person” has considerable responsibilities under the Fire Safety Order. In order to discharge those responsibilities properly, each social landlord should have a health and safety policy that clearly states how fire safety is embedded and managed. The use of a fire safety management system, such as PAS 7, is one way of ensuring this can happen.

So, where does the fire safety buck stop? In reality, for fire safety to be taken seriously in an organisation, it is also important to know where fire safety begins.

It begins with residents, (tenants and leaseholders) understanding the importance of fire safety within their homes and knowing their fireplan in the event of a fire. The Chartered Institute of Housing has published a briefing “How to communicate with tenants about fire safety” that provides useful information.

Employees and contractors need to know their role and understand any impact their work may have on the fire safety of the property. Passive fire safety training should be provided as part of the fire safety management system.

Fire safety, fire risk assessments, and information to residents are not “one off” events, they are part of an ongoing process that must be carefully managed.

'All that glitters is not gold; many a man his life has sold'

The Merchant of Venice ...William Shakespeare.

Julian Ransom, Associate (Ridge Property and Construction Consultants)



Faberge ...correctly regarded as the height of jewellery excellence ...exquisitely replicated flower and foliage designs crafted in precious metals and gems. However beware 'all that glitters'.

The dandelion illustrated, made for Russian imperial nobility (exhibited 1902), was ironically created to represent 'a symbol of the impermanence of life'. Made of gold with diamonds and jade leaves, unfortunately the delicacy of the seed head fronds was achieved by shredding pure mineral asbestos therefore continually releasing invisible, potentially deadly asbestos fibres.



Asbestos remained a very useful building material through the 20th century and is estimated to be contained within 2.4 million domestic premises in the UK. If disturbed in an uncontrolled manner, the potential to cause death following inhalation of these invisible particles sets a sober context for the management of this material by property owners and managers.

It was therefore again a privilege to co-present with Doctor Martin J Gibson, a seminar regarding asbestos compliance at the National Housing Maintenance Forum (NHMF) Maintenance Conference. As asbestos portfolio holder for the Health and Safety Executive (HSE), Martin has been responsible for asbestos related HSE

guidance over the last ten years. Nothing like hearing it 'straight from the horse's mouth' (apologies Martin).

The timing of the conference was particularly useful this year, given the publication on the 19th December 2013 of the new HSE Approved Code of Practice ACOPL143 '*Managing and Working with Asbestos*'. This is a significant publication as it represents the first comprehensive guidance interpreting the Control of Asbestos Regulations (CAR) 2012 and is particularly relevant to 'duty holders' responsible for managing domestic (and corporate) housing portfolios and commissioning work. This includes housing associations, arm's length management organisations (ALMOs), councils and the like.

The guidance sets out to help clarify and simplify the duties and obligations as well as detailing suggested approaches toward robust practical compliance. Primary regulation (CAR2012) remains unchanged, but ACOPL143 replaces and combines previous ACOPL143 and ACOPL127 and re-iterates and amplifies duties within HSG264 'Asbestos: the Survey Guide' and HSG227 'A Comprehensive Guide to Managing Asbestos in Premises'.

Not an exhaustive list; some key aspects of managing asbestos set out in the new guidance include:

- Cooperation: sharing of asbestos information and checking to ensure it has been understood
- Making a written (specific) management plan and then applying it
- Applying correct controls, including monitoring of condition (ACM re-inspection)
- Annual re-inspection to communal areas is no longer prescriptive
- 'Strong recommendation' only to use accredited surveyors (UKAS sole UK accredited body)
- Occupants of premises do not need asbestos awareness training, but they do need to be informed of the location of ACMs where appropriate (so that the ACM will not be disturbed during normal occupant activity)

While there has been detailed emphasis paid to the regulation of licensed removal contractors and the associated procedures, it is becoming increasingly clear that given

the number of deaths arising from asbestos exposure amongst general builders, plumbers, electricians and the like, projects involving 'non-licensed' or notifiable non-licensed' work while of lower individual risk, still demand a similar focus for good management and compliance.

As 'informed' clients, technical representatives (surveyors, project and asset managers) for housing associations, councils, and ALMOs, there is a clear and equal responsibility to set up, monitor and audit asbestos compliance approaches employed for the 'lower risk' activity typical of responsive repairs, void works and smaller scale on-going maintenance. It is simply not sufficient to presume that by virtue of appointing a larger management contractor, or direct labour organisation (DLO), compliant procedures will in fact be robust or practically applied. ACOPL143 requires going further in terms of checking that training is in place, and is regular and appropriate, that proper procedures have been devised, and the asbestos information provided (survey data) is fit for purpose and actually understood by those using it.

"If disturbed in an uncontrolled manner, the potential to cause death following inhalation of these invisible particles sets a sober context for the management of this material by property owners and managers."

Having personally conducted compliance audits and assistance for over 30 registered landlords, many of these aspects are frequently found to be inadequate and it is rare to be recommending less than 50 compliance improvements as a result.

ACOPL143 requires that asbestos management plans are reviewed at least every 12 months. If it is longer since this was carried out and reported to your board, take this opportunity to undertake or commission a robust, informed and comprehensive review to identify any gaps in your compliance regime.

For further information, or to download ACOPL143 (free), visit the HSE website: www.hse.gov.uk/asbestos, or contact me directly to interpret or help highlight any areas of potential concern.



Health and safety

Lift codes: being prepared for change

“With improved safety requirements is likely to come higher cost, and it is an unfortunate reality that the capital costs of new and replacement lifts are likely to rise.”

Jon Speck, Project Director, Lerch Bates



2017 will see the most sweeping changes to lift codes for many years. We are familiar with EN81 part 1 and 2, which has represented the standard for lift installations, and has been the best point of reference for housing development and maintenance professionals to ensure that lift equipment is appropriate and safe for their residents.

In three years' time, we will see the implementation of EN81-20 and 50 as the new standards covering lifts, so what can we expect from these new codes?

Certainly these documents will be no less exacting in terms of the safety requirements that are set for lifts. In fact the safety of lifts will continue to be of the highest priority, ensuring the wellbeing of residents and maintenance personnel alike.

However with improved safety requirements is likely to come higher cost, and it is an unfortunate reality that the capital costs of new and replacement lifts are likely to rise. This will almost certainly be an additional burden for landlords and maintenance professionals unless suitable strategies are put in place.

Modernise or replace

Whenever lifts reach the end of their serviceable life, there is a decision to be made – do we modernise or replace?

Modernisation has always represented the lesser impact on residents. Machines and vital safety equipment can be replaced, often at a reduced impact to residents if smart sequencing is used, but it has often proved the more expensive option.

A full replacement with a new lift, although it's implementation is less desirable for residents, has often proved the more cost effective option.

But now, with the impending code changes in mind, we will need to address this assumption and look again at what is right in each circumstance. A strategy for lift assets will be required to ensure expenditure is correctly applied to maximise the life and serviceability of the whole of our lift portfolio.

Strategy based understanding

Lifts are inspected all the time: by landlords; by insurance companies; by maintenance engineers. Why is it then that so few organisations hold registers of the vital data that is needed to make appropriate decisions on efficient lift expenditure?

Our portfolio may have a particular rogue unit, one that is constantly out of service and the residents have come to expect poor service, but does this mean it should continue to be the focus of periodic expenditure or should we bite the bullet and have it replaced?

Elsewhere we may have a handful of lifts that are older, but running reliably. However, residents are complaining about accessibility and there is a question as to DDA suitability.

In another location within our portfolio we may have a number of lifts that are not standing up to the challenges of their environment and we are starting to question whether they need a more robust vandal resistant fit out.

In all of these cases we can only make the correct choice if the information is available to inform our decision. An appropriate audit of a lift portfolio will examine existing equipment and its maintenance standards along with vital aspects such as existing modifications or DDA

compliance. Once this asset register is available it will help in the planning and implementation of a lift strategy for 2017 and beyond. It will aid in the prioritisation of works and help to target expenditure to where it will improve resident satisfaction and reduce future costs.

So the question remains – why do so few organisations currently have this asset register? The changes of 2017 will certainly be navigated best by those who are prepared.



Access for heating servicing: can we be more efficient?

Stewart Petrie, Director, (Safe and Healthy Homes Ltd)



With a proportion of recalcitrant tenants always likely to cause problems in allowing access for the servicing and/or safety checks on heating systems, we have witnessed a variety of procedures springing up

to ensure social landlords hit that magic 100% score. Some of these are very labour intensive, some of them appear heavy-handed and some of them may not be Human Rights Act compliant. Others succeed by bringing forward the start of the service programme to 11, ten or even a nine month cycle. This may result in achieving a 100% score, but at what cost? Is there a more cost effective method of gaining access? Is it time to take our 100% score and replicate it at lower cost year on year?

The necessity of bringing forward the servicing cycle to 11, ten or even nine months is driven by a few tenants who fail to allow access to carry out necessary safety checks and services. The subsequent "no-access" procedures take time, and it is this that has shortened the maintenance cycle and at some considerable expense. If an annual service/safety check is required it is wasteful to start the process after ten months. The cooperative tenants will be on a ten month cycle and consequently the service will be costing significantly more.

If it was possible to predict those tenants who were likely to be problematic a more nuanced programme could be devised. Indeed, some social landlords have applied procedures where previous offenders are programmed on a shorter cycle to take account of potential reoffenders. However good we get at making such predictions, there will always be those whose lives are so disordered that allowing access for maintenance is the last thing on their minds.

Perhaps we need to look at the problem differently. If we shorten the time from initiating the "no-access" procedure, it is still possible to work on a ten -or even an 11- month cycle and still hit our targets.

Instead of the slow and often unpredictable civil courts we need to use other existing laws in a more imaginative way. The Environmental Protection Act 1990 (EPA) provides a fast, cost effective method of gaining access through warrants issued by Justices of the Peace. Such

"Instead of the slow and often unpredictable civil courts we need to use other existing laws in a more imaginative way."

warrants can be, and have been, obtained to allow access within 48 hours in routine cases and "forthwith" in emergency situations. They can be obtained before the annual cycle has elapsed where tenants have refused access or failed to make arrangements for access. They can be used for solid fuel and oil systems if necessary. They do however require the cooperation of the local authority in which the property or properties concerned are located.

There should be another way to gain access for gas safety checks. The Gas Act has provision to allow the gas transporters to authorise people to act on their behalf where gas safety is an issue. Such an authorised person would again apply to a Justice of the Peace for a warrant. Indeed the whole process would be very similar to the tried and tested EPA route, save the necessity for local authority cooperation. Having been granted such a warrant the individual is bound by law to act in accordance with the wishes of the court and that brings some safeguards for the tenant.

There are also huge potential advantages for the social landlord with cross boundary estates. The same procedure can apply across its entire estate bringing obvious economies of scale and procedural simplicity. The swift results ensure there is minimal need to shorten the maintenance cycle. The legal costs are a fraction of those involved in civil action.

For the reasons of efficiency, cost effectiveness and tenant safety, we should look again at our access procedures and use all the available legislation, better to give us the result we need.

NHMF Training Days

Each training day involves a mix of plenary sessions and interactive workshops, and you are welcome whether you are currently in contract or preparing to re-tender.



The next date is:

How do you achieve clarity and simplicity in fixed Price Per Property (PPP)?

24 September 2014:

Mary Ward House, London

Speakers include:

- David Miller (Rand Associates)
- Andrew Milross (Anthony Collins)
- Paul Reader (MITIE Property Management)

**To find out more, visit
www.nhmf.co.uk/training
Buy 2 places & get 3rd free!**

Useful publications

The NHMF has sponsored a number of very useful guides which are published by the NHF. They include Contract Management, Housing Investment Appraisal and the new Practical Guide to Procurement to be published in July 2013. See the NHMF website for full details.





NHMF Maintenance Conference 2015

20-21 January 2015
Holiday Inn,
Stratford upon Avon

Book your place
www.nhmf.co.uk/conference

The annual NHMF conference is devoted to housing maintenance and run by maintenance professionals. It covers strategic issues, practical solutions to current challenges and provides a focus for networking and promoting best practice. The next conference will be held in Stratford upon Avon on Tuesday 20 & Wednesday 21 January 2015.

Speakers include experts from a wide range of relevant specialist fields from finance to fire safety, Government departments, National Housing Federation (NHF), Chartered Institute of Housing (CIH), resident providers, contractors, experienced consultants and professionals.

To book delegate places, for all enquiries, suggestions, exhibitor and sponsorship opportunities please see the website: www.nhmf.co.uk

The conference has been oversubscribed for the last three years, so don't miss out and book now for 2015.

A number of sponsorship opportunities are available.
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