

Workshop 1F:

Developing skills in house

Speaker: Paul Isherwood (NIHE)
Chaired by: Karl Linder (Hanover)
Room: Surrey Room



NHMF Conference 2018 Workshop 1F
Developing skills in house – succession planning

ASSET MANAGEMENT GRADUATE TRAINEE PROGRAMME

PAUL ISHERWOOD

Director of Asset Management Northern Ireland Housing Executive

DAVID TRUESDALE

Asset Management Training & Development

Tuesday 23 January 2018 11.30am

Who we are

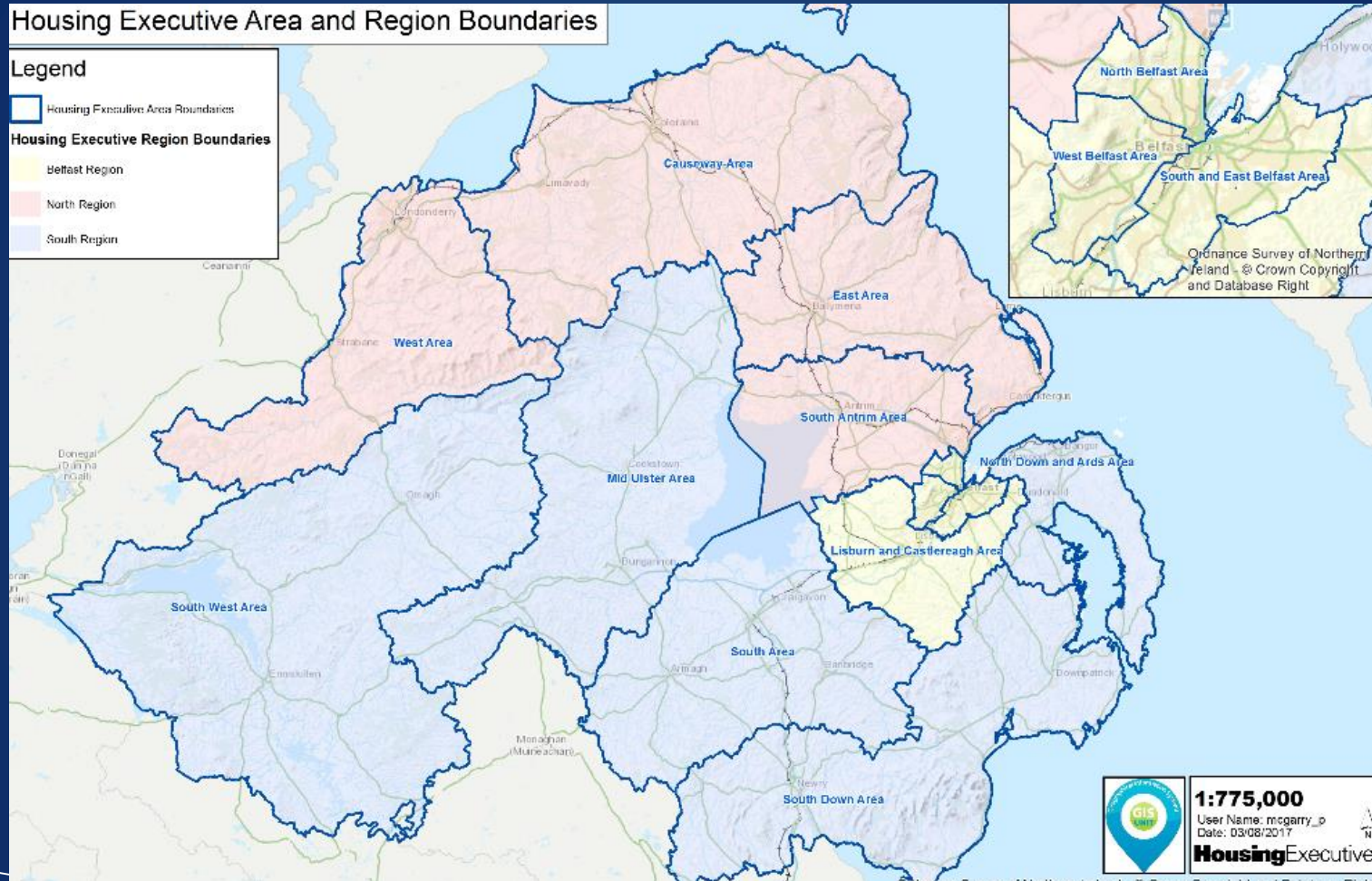
- Established by statute in 1971
- Functions of 65 local authorities/ housing bodies transferred to NIHE by 1973.
- Owned 202,000 homes at high point
- Comprehensive Regional Housing Authority with strategic functions across all housing tenures
- 119,503 house sales of NIHE Stock to date
- 1,250 hectares of undeveloped land
- 2nd largest landowner in NI
- Largest public sector landlord in UK with 87,000 homes across 800 estates

Regions – Belfast, North, South...

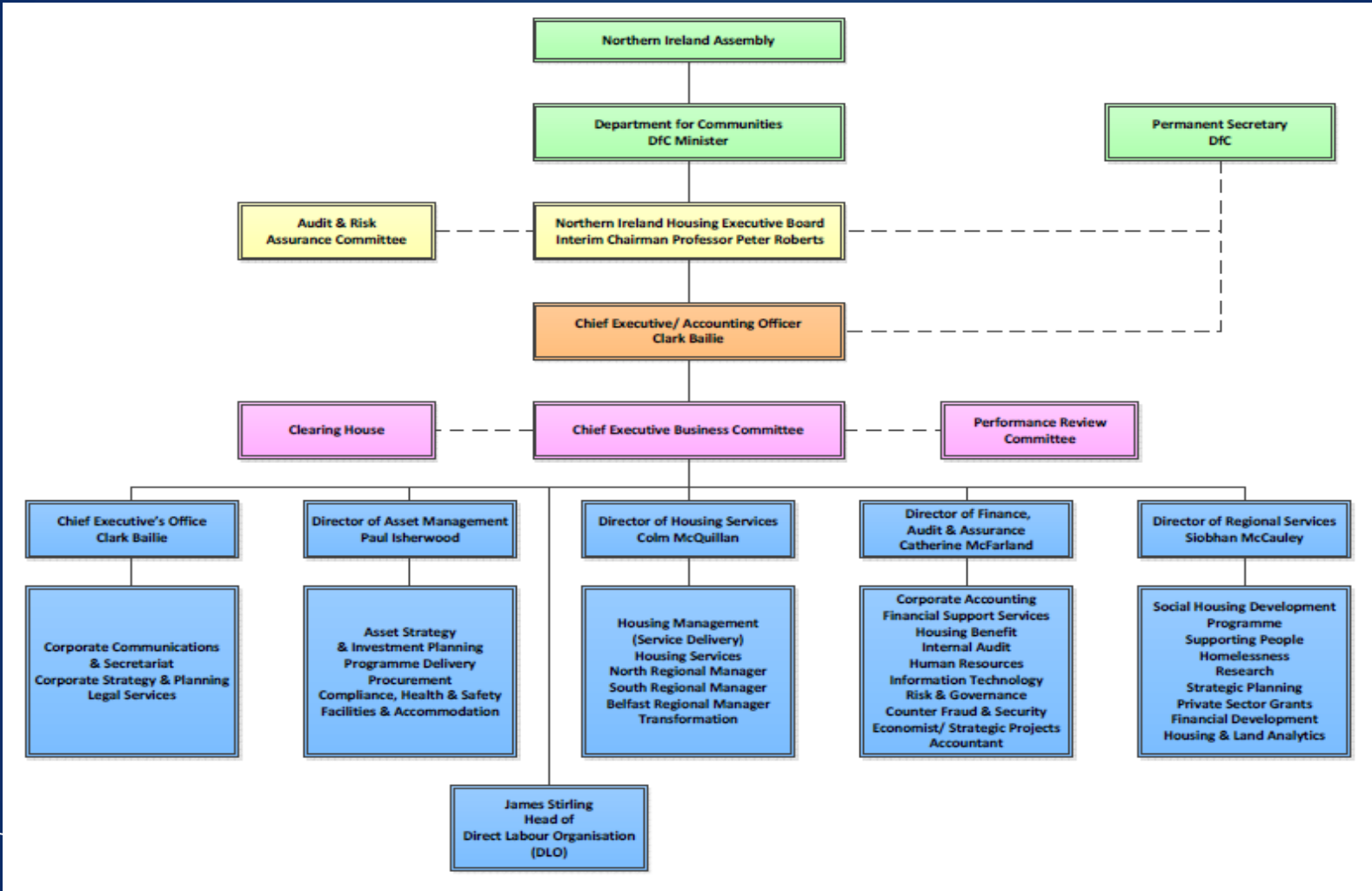
Housing Executive Area and Region Boundaries

Legend

- Housing Executive Area Boundaries
- Housing Executive Region Boundaries**
- Belfast Region
- North Region
- South Region



Management Structure



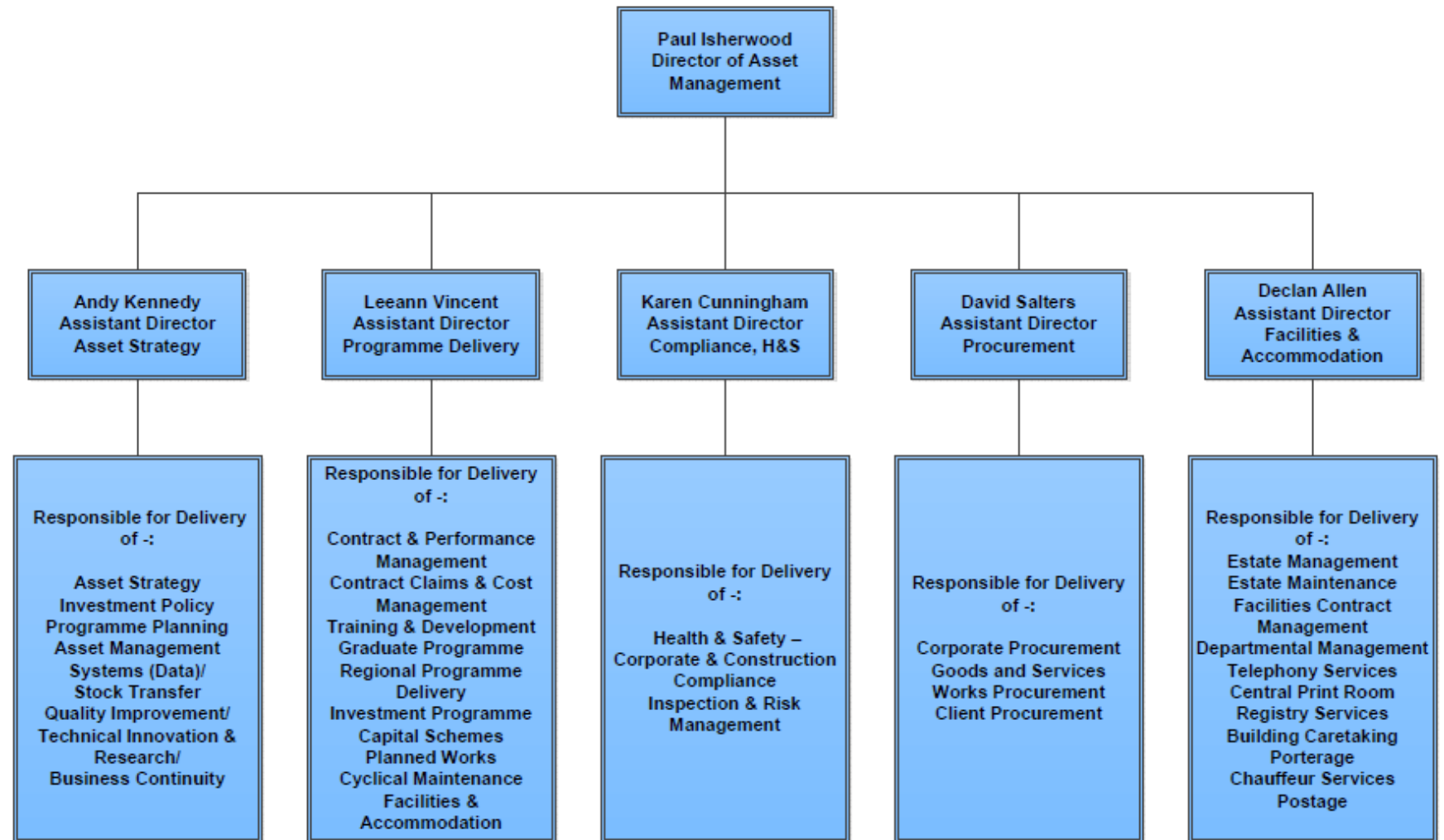
Need for Asset Management Division...

- **Dedicated to manage asset base of organisation following findings from Asset Commission**
- Condition, performance and management of NIHE's property portfolio examined – also informed SHRP
- Savills appointed delivering series of reports
- Stock Condition Survey Report confirmed – well built stock historically benefiting from significant ongoing investment
- As stock gets older – increased investment required
- 30 year stock investment estimated to be £6.7bn
- Significant investment of £1.5bn required in first 5 years

Asset Management Division Established in 2015

- Director appointed June 2015
- Managing 87,000 stock across Northern Ireland
- Through Five Key Divisional Departments:
 - Asset Strategy & Investment Planning
 - Programme Delivery
 - Compliance, Health & Safety
 - Procurement
 - and from December 2017 – Facilities Services & Accommodation
- New contracts procured – MIS Contract 2016, Heating, Planned
- Delivering Planned Maintenance through 3 Regional Offices – Belfast/ North/ South

Asset Management Structure



Programme Spend – FY 2016/17...

Planned Works

£108 Million

Response Maintenance

(Includes Grounds Maintenance, Ground Improvement work, MAPD, COT, Voids, Void Security)

£42 Million

TOTAL SPEND

£150 Million



New Service Delivery Models...

- More streamlined approach and process
- Reduction in number of Contracts
- One form of contract used across work categories
- One Central point of Delivery/ Contact – Project Manager
- New staff required to support delivery of new contracts

Why a Graduate Trainee Programme?...

- Age profile of Technical grades in the Division –
 - In 2015 almost **40%** were aged **55 years or older**
- **Staff** in age bracket **retiring** – through various methods
 - hence...accelerated staff turnover
- Staff retire– Knowledge/ experience lost – vacuum left behind
- Lack of qualified & skilled technical staff available in market place
- Difficulty recruiting staff to key business areas –
 - ...Contract Claims, Procurement, H&S

What we need...

*...is the **right people**...*

*...with the **right skills**...*

*...in the **right job**...*

Our answer – The Graduate Trainee Programme

“Growing Our Own Talent in-house from Grass Roots”

...Recruit

Train

Retain...

The Detail

- **Last Technical Graduate intake to NIHE was 1991**
- **In 2014 Asset Management staff compliment was 406**
 - 398 substantive positions
 - 8 temporary contracts
 - Significant additional number of agency staff
- **Analysis of substantive post holders age profile indicated that within Professional/Technical staffing compliment:**
 - **44%** of TL2 Grade Technical Officers are 55 years +
 - **47%** of TL3 Grade Technical Officers are 55 years +
 - **65%** of TL7 Grade Technical Officers are 55 years +
 - Overall 149 staff of TL2, TL3 & TL7 Grades out of 398 substantive posts – 38% are 55+
 - **HENCE... staff over 55 retire resulting in accelerated turnover in this age bracket...thus staff shortage at all levels**

DAVID TRUESDALE
Asset Management Training & Development
Northern Ireland Housing Executive

The Solution...

- Asset Management Graduate Trainee Programme
- A succession planning model recruiting to technical posts
- Key programme driver – age profile of technical grades

So...

- With a focus on Project Management moving forward
 - We partnered with Ulster University for delivery of PG Diploma in Construction Business & Project Management
- NIHE with Ulster University developed bespoke module on 'Built Asset Management' delivered as part of course
 - PG Diploma underpins 2yr programme supported by NIHE
 - Trainees use NIHE work informing their study
- Part time course – with block release accommodates work/ study balance

The Timeline ...

- **Initial approval** granted in **2014** to recruit **2 tranches** of **12 Trainees**
 - Tranche 1 commenced 2015
 - Tranche 2 commenced 2016
- **Due to success...further approval** granted in **2016/17** to recruit
 - 9 Graduate Trainees
 - 6 School Leavers

The Purpose...

- Ensures better succession planning
- With staff who have the right skills to deliver the job
 - Results in less dependency on agency staff

...and to date...

29 Graduates recruited of 42 Approved

- **11** in 2015
- **10** in 2016
- **8** in 2017

The Aim...

- *To ensure all trainees gain an understanding of the role of the NIHE in social housing in Northern Ireland.*
- *To gain operational experience of the services delivered by the NIHE Asset Management Division.*

- ***Achieved through...***

- **Meeting Key Generic Competencies & Specialist Asset Management Competencies set out in Manual/ Log Book**

- ***Facilitated through...***

- Comprehensive 4 Day Induction Programme

- **In Tranche 1 (2015)**

- Rotational Placement between the 4 Divisional depts.
 - With option to work on Special Projects...

- **In Tranche 2 (2016)**

- Rotational Placement (as above) in Yr1 of programme
 - In Yr2 – job specific roles in Centre & Regions

- ***Facilitated through...***

- **In Tranche 3 (2017)**

- Recruitment to job specific roles meeting business need
 - In Contract Claims
 - In Regional Programme Delivery

- **In Tranche 4 (2018)**

- 13 Graduate Trainees remain to be recruited
 - To job roles where it has remained difficult to recruit
 - Meeting business need

The Structure...

- Structured Trainee Manual / Log Book & Competency Assessment covers all placements in the programme...
- **Asset Strategy**
- **Programme Delivery**
- **Compliance, Health & Safety**
- **Procurement**

Manual / Log Book...

Assessment of Competence

+

Unit 2 – Asset Management – Planned Works – Regional Programme Delivery Post	Demonstration of competence – applying the knowledge	Y/N	Training & Development Manager comments
1. Understand the role of Planned Works – Regional Property Services and the function it delivers in Planned Schemes.			
2. Understand the requirement for schemes to be delivered on Time , to agreed Cost and required Quality in line with the NEC3 Form of Contract.			
3. Understand the role of Regional Programme and Planning.			
4. Meeting all the key competencies/Activities as set out in the Planned Works section of the Training Manual & Log Book.			

Unit 2 – Planned Works – Regional Programme Delivery Post: overall demonstration of competence (An overall score of 'Y' can only be achieved where this has been awarded in all of the competency areas above) Y/N

Trainee signature: _____ Mentor/ Line Manager signature: _____ Comments: _____

Date: _____ Date: _____

Training & Development Manager signature: _____ Date: _____

Manual / Log Book...

Assessment of Competence

Unit 3 – UU Post Graduate Diploma in Construction Business & Leadership	Demonstration of competence – applying the knowledge	Y/N	Training & Development Manager comments
1. Attendance at the course on the scheduled days in Year 1 and in Year 2.			
2. Successful completion of all of the assignments in Year 1 and Year 2 issued as part of the course.			
3. Successful completion of all exams in Year 1 and Year 2.			
4. Successful completion and award of the Post Graduate Diploma in Construction Business and Leadership.			

Unit 3 – UU Post Graduate Diploma in Construction Business & Leadership: overall demonstration of competence Y/N__
(An overall score of 'Y' can only be achieved where this has been awarded in all of the competency areas above)

Trainee signature: _____ Mentor/ Line Manager signature: _____ Comments: _____

Date: _____ Date: _____

Training & Development Manager signature: _____ Date: _____

- Competence Assessment – UU Post Graduate Diploma

Manual / Log Book...

Asset Management	Asset Management	Asset Management	Asset Management	Asset Management	Asset Management Graduate Trainee Programme
REGIONAL PROGRAMME	Regional Programme	Regional Programme	REGIONAL PROGRAMME	Regional Programme	Regional Programme
<p>Purpose / Aim:</p> <p>Plan Regional Programme under management</p> <p>Trainee Project operational budget management process role to be</p> <p>There are 3 Regional Works, Belfast Regional Offices are based in Londonderry and South</p> <p>Each trainee should</p> <ol style="list-style-type: none"> 1. Knowledge 2. Practical Experience 3. Managerial Experience 	<p>Trainees are to, where possible, with high include time work</p> <ul style="list-style-type: none"> • Revenue External (Upgrades). • Window Refurbishment LRDG Schemes • Major Adaptation • Major Housing • Adaptation • Multi-Element • Major Capital • Other Miscellaneous <p>With time spent on Senior Project</p> <p>Each trainee will have Area Programme within NIHE including Safety and Protection Central Finance.</p> <p>Trainees should have an agreed budget NEC contract with</p> <p>Trainees should</p> <ul style="list-style-type: none"> • on Time (i) • to agreed accurate in • to require Specific 	<p>Trainees should</p> <ul style="list-style-type: none"> • Inception • Economic • Briefing • Outlining • Regional • Regional • Month • Risk, Estimate • Month • Annual • Schemes • Dwelling • Dwelling • Contracts • Additional Management <p>Key Skills are</p> <p>The listed skills expanded as Delivery Manager meeting them not been met so the trainee Programme is discussed with Manager.</p>	REGIONAL PROGRAMME	<p>Activities (Es)</p> <p>Involvement in</p> <ul style="list-style-type: none"> • Schemes must be fit agreed budget contract • Schemes with the cost paid for the brief, Quality Specific • Initially start following: <ol style="list-style-type: none"> (a) Revenue Replacement Low/Medium Priority brief (b) Window Double (c) Major (d) Major (e) Multi-Element (f) Major (g) Other • Shadow/responsible on schemes • Shadow/Manager • Shadow/closing firm • Attendance 	<p>Trainee Reflections / Notes:</p> <p>Trainee Signature & Date:</p> <p>Key Skills:</p> <ul style="list-style-type: none"> • Managing the delivery of physical schemes to the NIHE housing stock • Assessing and monitoring information • Interpreting policy • Problem solving • Contract Management • Financial cost control • Working within set timescales <p>Comments from Regional Programme Delivery Manager/ Line Manager:</p> <p>Regional Programme Delivery Manager/ Line Manager Signature & Date:</p> <p>Comments from Training & Development Manager:</p> <p>Training & Development Manager Signature & Date:</p>

Manual / Log Book...

Asset Management Graduate Trainee Programme

Section 1:

The following Internal / External Training Courses are to be completed by the Asset Management Graduate Trainee:

No:	Course Provider	Course Start Date	Course End Date
1	UUJ Post Graduate Diploma in Construction Business & Project Management	2017	2018
2	HR Induction E-Learning Pack	2017	2018
3	L&D Code of Conduct	2017	2018
4	L&D An Introduction to Working Safely	2017	2018
5	L&D Data Protection Training	2017	2018
6	L&D Fraud Awareness Training	2017	2018
7	L&D Minute Taking (L&D Team)	2017	2018
8	L&D Effective Presentation and Communication Skills (L&D – 2 day course)	2017	2018

Section 2:

The following Internal Training courses are delivered through the Trainee Forum and are to be completed by the Asset Management Graduate Trainee:

No:	Course Provider	Course Start Date	Course End Date
	Monthly Group Trainee Forum – Topics		
1	NIHE Standing Orders/ Annual Declaration (David Truesdale)	Sept 2017	2018
2	Principles of Contract Management (David Truesdale)	October 2017	2018
3	L&D Effective Presentation & Communication Skills (Tommy Murray)	Nov 2017	2018
4	NEC3 ECSC Contract Training & ECSC Workshop Scenarios (David Truesdale)	Dec 2017	2018
5	NEC3 ECSC Contract NIHE Amendments & ECSC Workshop Scenarios APD Contract Workshop Homework (David Truesdale)	Dec 2017	2018
6	NIHE APD Contract Scenario Workshop (David Truesdale/ Pamela Vasey)	Jan 2018	2018
7	NEC3 TSSC Contract Training & TSSC Workshop Scenarios (David Truesdale)	Jan 2018	2018

Section 3:

The following tab training that may be completed by the Asset Management Graduate Trainee:

(Note: Each request must be approved by the Assistant Director Programme Delivery)

Name:-
Year:

Generic/ Specialised Internal/External

Course Name & Date of request:

Trainee _____

Assistant Director _____

Asset Management Graduate Trainee Training Programme Overall Sign Off

Trainee Reflections / Notes on Overall Training Programme:

Trainee Signature & Date:

Comments from Training & Development Manager:

Training & Development Manager Signature & Date:

Comments from Assistant Director Programme Delivery:

Assistant Director Programme Delivery Signature & Date:

Programme to date...

- In June 2017 Tranche 1 successfully completed 2 Year PG Dip in Construction Business & Project Management
 - All embedded in the business
- Tranche 2 have all successfully completed Yr1 of PG Dip
 - All are due to complete the programme in June 2018
 - All embedded in the business as trainees in job roles
- Tranche 3 have commenced Yr1 of PG Dip in Sept 2018
- All have successfully completed Yr1 Semester 1 of PG Dip
 - All embedded in the business as trainees in job roles

“Lets hear about the programme from our trainees”...

Housing
Executive

Housing
Executive

Personal Benefits of Programme – What the trainees gained...

- Structured Programme Manual & Placement Plan/
Monthly Group Meetings & Training
- Increased Self Confidence/ Teamwork/ Professionalism/
Earning Valuable Experience
 - Development of technical & interpersonal skills
- Linkage with university study & relating it to on-the-job training/ experience
- Ability to rotate & experience different sections of the division/ organisation
 - Better career opportunities across the various facets of the division

Organisational Benefits of Programme...

- Good Succession Planning Model for the division & organisation
 - Trainees Mentored throughout Programme
 - On-the-job trained/ skilled employees
 - Flexibility of Trainees to be placed across the division depending on business need
 - Business critical work completed in less than 12 months
- NIHE has fully detailed/ developed Tower Block EA documents
 - applied to other stock
- Development of Central EA team – important asset to NIHE

“Lets hear again from our new recruits about their job roles”...

Housing
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Housing
Executive



Asset Management Graduate Trainee Programme
CIH Housing Awards 2017

Winner

Excellence in developing skills and capacity

Moving Forward...

- Tranche 4 Graduate Trainees – 13 to be recruited
- Tranche 1 School Leavers scheme – 6 to be recruited
- QS Student Sponsorship – 5 to be recruited
- Establishment of a NIHE Construction Academy for NI
Addressing the skills shortage – Creating a skills pool

Our Team...

Our Future...

We build on ambition...yours

Thank You
Questions?