#### **NHMF Maintenance Conference 2013**



# Achieving Effective, Relevant and Long lasting Stock Condition Surveys 22nd January 2013

Chaired by: Paul Isherwood

#### Introduction



#### **Graham Sidaway**

- About my background.
- 25 years in housing mainly repairs and asset management.
- 8 years in housing consultancy.
- Why consultancy?
- Many years of commissioning.
- Blend of excellence and pragmatic working.
- Conference session why me?

#### **About This Session**



#### It's not about:

- Making a business case.
- The technicalities of a stock condition survey will leave this to the usual suspects!
- Procurement of a survey different subject entirely.
- Choice of software and databases.
- Methods of measurement and financial costings.
- Wider Asset Management Strategies.
- Ark can help you with all of the above!

#### **About This Session**



#### But it is about:

- Billed as the choice between out-sourcing or insourcing – more to discuss?
- Clients perspective don't end up with an expensive white elephant!
- Asset management strategies, box ticked, on the shelf gathering dust?
- Approach and considerations.
- Tool to shape the viability of your organisation.
- You know your business and intentions how to get the best result.

### We Need a Stock Condition Survey!



- · Without proper management don't bother!
- What are you going to use it for?
- Whose going to do it?
- We didn't use the last one!
- What about all the other priorities?
- Can you make a business case?
- Why can't you make do with RPI +3%.
- Early engagement with the accountants!

#### The Key Drivers



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- · Alignment of the Business Case must address these?
- · Use audit to apply leverage.
- National and Local Government.
- Housing Regulators (KLOE?!).
- · Resident priorities.
- Housing strategies.
- Grant funding subsidies.
- Available internal funding.
- Organisational change.
- Appetite for development.
- · Viability of the organisation.
- Due diligence.



#### **Scope and Outcomes Required**



- Key word outcome.
- Don't rely on a crystal ball?
- Global financial planning?
- Investment programmes?
- Detailed Asset Management strategic planning?
- Beware of silo strategies.
- Overarching throughout the organisation.
- Don't make the financial model unrealistic and undeliverable.

## **Approach and Resource Management**



#### **Engagement and Consultation**

- Secure input of customers (hardest thing?).
- Involvement of non-technical stakeholders (know history/properties).
- Don't forsake your own people?
- Senior management and Board.
- Use PR to promote the profile of the department.

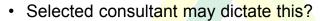


### Approach and Resource Management



#### **Information Technology**

- Enlist I.T. department, but retain project lead.
- Database solutions bespoke or mainstream?



- Consider other modules?
- Consider in-house capability.
- Don't give up on handheld technology but don't use PDA's!
- Need a database expert to manipulate data.

### **Approach and Resource Management**



#### Surveying Approach - In-House or Out-Source?

- Comprehensive briefing and supervision.
- Depends on complexity of stock.
- Caution about fully in-house.
- Conflicts with other operational priorities.
- Achieves internal buy-in.
- Consistency of approach.



## **Approach and Resource Management**



### Surveying Approach – In-house or Out Source? (Continued).

- Surveyors count in 5's?
- · Saves money?
- Major project not to be underestimated?
- Organisational attitude to performance management.
- Ideal blend outsource initial survey, own and manage data integrity.
- Strong leadership and management to succeed.

### Approach and Resource Management



#### **Surveying Approach - Methodology**

- Consider validity of existing data?
- Ensure correct property hierarchy in housing management system.
- Survey design comprehensive but realistic.
- Balance between planned maintenance and reality.
- Data audits do them early to highlight anomalies.
- Percentage sample depends on outcomes required.

## **Approach and Resource Management**



#### **Surveying Approach – Methodology (Continued)**

- Choice between cloning or extrapolation?
- Use intelligent cloning establish bespoke archetypes.
- Beware of software driven smoothing use desktop studies and workshops.
- Think about timing and opportunities.
- Allow plenty of time for post survey validation and refinement.
- Converging with parallel strategies.

### **Approach and Resource Management**



#### **Data Management**

- Be prepared for cultural change.
- Clear strategy for ongoing upkeep of data integrity.
- Data integrity checks in budgetary planning calendar.
- Independent audits ensure credibility.
- Staff performance management.
- Set key performance indicators.
- Create resource capacity.
- Involve HR to avoid pitfalls.

## Approach and Resource Management



#### **Training and Software Implementation**

- Key principles and scenarios during surveying.
- Don't underestimate timescales for mobilisation and testing.
- Ensure software provider on strict SLA.
- Focus on core functions and day to day tasks.
- Tailor the training to the user's role.
- Develop in-house Champions.
- Regular refresher training.
- Adequate budget for external support.

#### Scenarios and Options Appraisals 🚣



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- Look at silo strategies.
- Consider softer strategies.
- Apply stock viability tests.
- Categorise stock within agreed criteria.
- Many software applications offer solution.
- Outcomes ensure maximum stock viability.
- Stock condition survey is just the beginning?
- Quick and dirty first trawl (having set the desired outcomes).

### Scenarios and Options Appraisals And housing consultancy



- Use Interactive SQL for queries and data manipulation.
- Different approach for retained stock compared with more radical options.
- Look carefully at non traditional construction.
- Factor in stock improvements and other initiatives.
- Consider development opportunities.
- Identify the Crown Jewels.

#### To Conclude



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- Thanks for time and attention.
- No obligation health check.
- Visit Ark's exhibition stand (Stand 11)
- Consultancy opportunities?
- Above all, be professional in all that you do?

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