

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 in-sourcing – 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



- 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?
- Selected consultant may dictate this?
- 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.
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Scenarios and Options Appraisals



- 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).
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Scenarios and Options Appraisals



- 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



- 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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