

Together  
we enrich  
lives

# Asset Management Strategy 2019–2022

[choice-housing.org](http://choice-housing.org)





Choice Asset Management  
is linked to our Mission  
**‘to enrich lives through  
great homes and services’**



## Foreword

The past three years have seen the Choice Assets Team successfully deliver high profile redevelopment and remodelling projects, some of which to historic buildings which have greatly enhanced the surrounding areas.

These works directly link to our Mission ‘to enrich lives through great homes and services’ as we recognise the impact that living in a good quality home has on our tenant’s everyday lives.

Our previous strategy focussed on gaining a better understanding of our Assets and establishing a more consistent approach to stock condition, our new strategy aims to build on our previous successes to develop the services provided by the Assets Team, setting new challenging targets which impact across each of our four group strategic goals.

**Michael McDonnell**  
Group Chief Executive

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# Executive Summary

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Our previous Asset Management Strategy outlined how we were intending to gain a better understanding of our Assets, establish a more consistent approach to stock condition surveys, increase customer satisfaction and set standards across the department. Some of our achievements are shown below.

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## 38 million

Invested in our properties through the PMP from 2016-2019



## 90%

Level of customer satisfaction achieved



## 60%

Of the total housing stock has a current stock condition survey



## ISO9001

Quality management system has been implemented for all of the Assets Team activities

Figure 1

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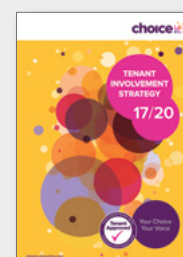
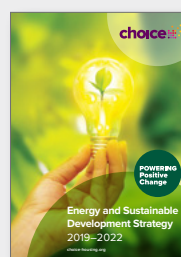
Our sector currently faces numerous economic, political, social and environmental challenges and this strategy will allow the Assets Team to build on the success of the previous strategy. Our aim is to develop a talented in-house team who can deliver our in-house planned maintenance programme and also provide building surveying services to external clients, generating income for Choice.

This strategy demonstrates our commitment to deliver projects of a high technical quality whilst balancing the needs of the customer. Since the previous strategy we have implemented quality standards and procedures which have given the Assets Team a solid foundation for continual improvement in a structured and meaningful way.

Over the two year life span of this strategy we aim to invest approximately £10million each year across our housing stock, linking with our detailed 30year financial plan.

Our Asset Management Strategy is clearly aligned to our Group Corporate Strategy, with targets categorised under the four Strategic Goals of Great Homes, Great Services, Value for Money and Digital Transformation. This Strategy also links to other areas of our business and aligns with strategies, which include the following:

- **Development Strategy 2018/19 – 2020/21**
- **Energy and Sustainable Development Strategy 2019/20 – 2020/21**
- **Tenant Involvement Strategy 2017 – 2020**
- **Financial Inclusion Strategy 2017 – 2020**



## Introduction

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Choice Housing Ireland Limited is an Industrial and Provident Society registered as a Housing Association and Charity by our regulators, the Department for Communities and the Charity Commission for Northern Ireland. The Association is a social enterprise, has a voluntary membership and all surpluses are reinvested to fulfil our charitable purpose.

Our charitable purpose for over 40 years is ‘to benefit the community’. We do this through the provision of social and affordable housing, through the provision of assistance to help house people, and through associated facilities, amenities and services for the ‘prevention or relief of poverty or for the relief of those in need’.



Figure 2

Our core values, as shown above in **Figure 2**, underpin all of the work we do, with our approach and objectives aligned to these values. For example, we demonstrate that we are trustworthy by investing in our assets using a priority managed methodology, which primarily prioritises on compliance and consultation from Property Services through project appraisals. We hold detailed records on the lifecycle of our assets and balance this with physical stock condition surveys to assess the requirement for replacement. We are customer focused in that we involve customers throughout improvement projects, providing choice in specifications and colours were appropriate and also seek feedback upon completion of work; this enables us to

improve our service. We are also dynamic; the in-house design team has been developed to offer an expanding range of services to external clients. This generates an income stream for the Association which can then be invested to benefit our customers.

There is currently significant uncertainty in the sector in relation to legislation and future potential challenges, but Choice are committed to supporting relevant Government Departments and industry bodies. We will continue to demonstrate leadership in this area and engage with relevant stakeholders and partner organisations.

# Governance and Oversight

Figure 3 highlights the Governance which is in place in relation to the Asset Management Team, with the Asset Management Strategy managed by the Assets Manager under the responsibility of the Group Director of Development and Assets.

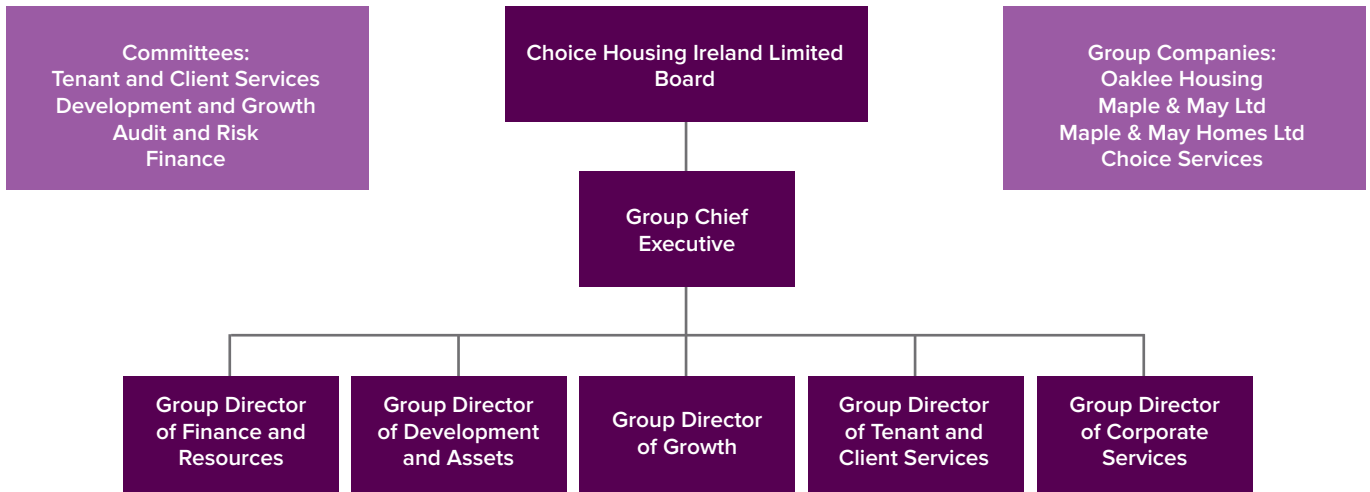


Figure 3

Three teams form the Development and Assets Directorate.

**Asset Management:** Responsible for the delivery of the planned and cyclical maintenance programme, stock condition surveys, life cycle analyses and costing, long term investment, major disabled adaptations and asbestos compliance.

**Development:** Responsible for the development and delivery of new homes. This includes identifying suitable sites, planning and development of scheme proposals, construction and project management. This is in line with the Social Housing Development Programme and is focused on achieving best value for money.

**Energy Management:** Responsible for reducing energy use, the cost of energy and our impact upon the environment. This team is also responsible for promoting a culture of energy efficiency within Choice and providing support and advice to our customers.

Figure 4 shows the current structure of the structure of the Asset Management Team.

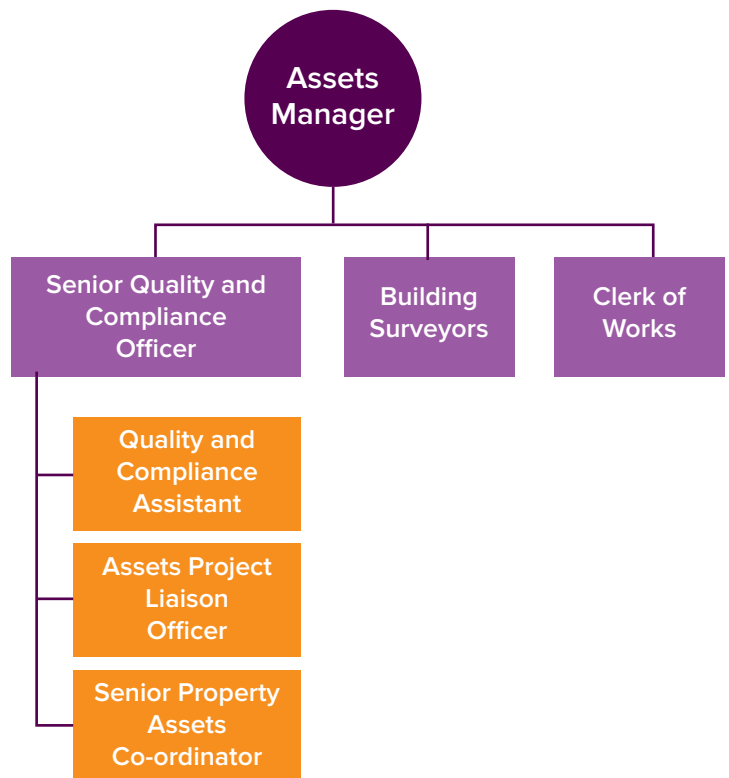


Figure 4

Asset Management is a Choice function and extends to group companies through agreed Service Level Agreements, which include Oaklee Housing and Maple and May. A separate Asset Management Strategy has been developed for Oaklee Housing with a common approach adopted.

The aim of the Asset Management Strategy is to shape the future direction of the property assets to ensure that they meet corporate objectives and customer expectations. Asset Management goes beyond investing in good repair and improvements. Asset management is about reviewing and changing the asset base to achieve the right accommodation in the right location supported by excellent flexible services for our customers. Excellent asset management considers quality and value for money, particularly the whole life of a home and how future running costs will impact the customer

By implementing this Asset Management Strategy to our 10,000 plus homes, the benefits will include:

- Assets aligned with corporate aspirations and customer needs
- Homes which will be more affordable to customers
- A clear understanding of maintenance needs
- Value for money delivered through smart procurement and targeted investment and the use of an in-house design team
- High levels of customer involvement and satisfaction
- Streamlined efficient services delivered through a quality management system, and
- Appropriate disposal of ageing assets, enabling investment in new homes and reinvestment in existing homes.

This Asset Management Strategy builds on the successes of the previous strategy setting out a strategic framework to provide excellent housing and support services, invest in our homes and neighbourhoods, grow the organisation sensibly and continuously improve our financial strength.



Over the past 3 years Choice have invested over £38million in its housing stock, to ensure that our housing meets the need of the customer



# Our Approach

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Our approach to Asset Management incorporates the four Group strategic goals to provide a holistic approach as shown in **figure 5**.



Figure 5





# Our Strategic Themes

# #1 Great Homes

## Strategic Theme:

### **Investing in our Assets**

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One of our Corporate Strategic Objectives is to provide 'Great Homes' and so the investment in our assets is key to the Assets Team. Each year the Assets Team formulate a planned maintenance programme based on stock condition data, which prioritises on compliance and consultation from Property Services through project appraisals.

Each year the Assets Team completes a 20% cycle stock condition survey of the entire housing stock. This information is used to produce long term reports that prioritise the planned maintenance projects based on lifecycles and the actual condition of our properties. This enables us to provide great homes that are consistently compliant with the decent homes standard.

Planned Maintenance Projects, include replacing components to modernise homes, such as doors and windows, kitchen and bathrooms and replacement of central heating systems.

The Assets Team will also carry out option appraisals to ascertain the viability of a building. Often this can result in a full remodelling project, such as changing the purpose of the building from shared student accommodation to self-contained flats.

Whilst planned maintenance projects are on site the Assets Team aim to provide an excellent service to both customers and the general public by aiming to achieve a minimum score of overall Very Good from the Considerate Constructors scheme.

The Asset Team will continue to deliver planned maintenance and remodelling projects to a high standard. Our aim is to achieve a minimum score of 'Very Good' from Considerate Constructors scheme

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We plan to improve our properties by investing £10million each year

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### **126 Strand Road, Derry~Londonderry**

£3m upgrade of 126 Strand Road, in Derry~Londonderry. The ambitious redevelopment of the scheme included the remodelling of its existing 86 apartments to an increase of 96 new modern self-contained units; the three largest each accommodate families of four. The renovation project included an overhaul of all electrics and plumbing within the building and the fitting of new kitchens and bathrooms throughout, as well as a number of other upgrades to the building.

The renovation, which started in November 2016 and finished August 2018, marked a new chapter for the scheme and for its residents bringing the very best standards into the historic building. It is one of the largest housing renovation and refurbishment projects undertaken in Derry~Londonderry and has radically enhanced the area.

# #1 Great Homes

## Strategic Theme: **Sustainability**

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The Assets Team are committed to working closely with the Energy Team to ensure that there is a joined up approach to sustainability. The Building Surveyors will consult the Energy Team at the design stage of the planned maintenance and stock remodelling projects to gain advice on incorporating energy efficiency measures in projects.

We are committed to ensuring all properties perform as well as possible in terms of environmental impact and that we offer affordable warmth to all tenants.

The principle of retrofitting existing properties and evaluating the benefits of new technology is supported by the Assets Team. Choice is clear that there is a need to develop a greater understanding of the range of technologies available and adopt a planned approach to ensure that technical and investment decisions deliver the right outcomes for our customers.

The Asset Team will work with the Energy Team on recommendations for new technologies which can demonstrate viable financial models

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### **Electric Heating**

When updating electric heating the Assets Team consulted the Energy Team for recommendations on the latest technology. The Energy Team recommended the installation of Quantum electric storage heaters.

The Quantum heaters provide a low-cost, low-carbon alternative to the traditional electric storage heater. With rising fuel costs finding a more energy efficient heating system for customers is a main priority. The Quantum heaters provide our customers with a modern low input electric storage heater with 24 hour control. Customers are in control of their heating day and night. Quantum heaters are the most economical storage heater on the UK market with low running costs saving our customers up to 27% on their electricity bills when compared to the running costs of the old heaters.



# #2 Great Services

## Strategic Theme:

### Customer Consultation

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We value our customer's opinion and understand that major works have a significant impact on the household and successful outcomes are delivered when Choice, tenants, consultants and contractors work together. Tenant consultation and liaison improves service delivery, quality and satisfaction.

We provide customers with the opportunity, where appropriate, for involvement to ensure their needs are met. Before a project begins the Assets Project Liaison Officer will find out if tenants have any special requirements and these requirements will be accommodated as much as possible. In June 2019 the Assets Team will be trained on how design impacts on individuals with dementia, focussing on dementia friendly design.

The Project Liaison Officer will consult with customers before the start of a project, providing information on what will happen and outlining expectations for customers, contractors and Choice. Customers will be provided with the opportunity to choose their preferred option, when appropriate, such as kitchen doors and worktops or colour of front door. During the project the Project Liaison Officer will be on hand for customer queries and after the project has completed the Project Liaison Officer will gather customer feedback to be used as learning outcomes to improve our service in future projects.

The Asset Team aims to maintain the current standard of 90% Customer Satisfaction levels

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### Elm Court Open Day

A multi element improvement project was completed at Elm Court in 2018. Customer consultation was vital at this scheme as kitchens, bathrooms, full communal refurbishment including flooring and fire door upgrade, roof works, external ground works, were all included.

The customers were given the opportunity to make the choices for their kitchens and make joint decision regarding the communal areas. Our Project Liaison Officer played a key role within this project, outlining how and when each element of the works would be completed.

## #2 Great Services

### Strategic Theme:

## Statutory Compliance and Best Practice

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### Asbestos

The Assets Team now have responsibility for asbestos compliance across Choice assets. The Assets Team have established an Asbestos Management Plan and have worked with an asbestos consultant to put into place an active database for asbestos surveys. Staff from across the organisation have received training on how to use the database and download reports. The comprehensive database ensures that Choice is fully compliant with asbestos legislation and enhances duty of care for staff and customers. Within the Assets Team one member of staff has completed the BOHS P405 Management of Asbestos in Buildings, providing in-house expertise on asbestos compliance.

The Assets Team has rolled out communication on asbestos to staff and tenants through training sessions and a tenant leaflet.

### Adaptation Work

The Assets Team will continue to manage major adaptation work to properties to comply with the Disability Discrimination Act. When an Occupational Therapist identifies the need for a major adaptation a Building Surveyor from the Assets Team is appointed as the project manager to deliver the required adaptations within the performance targets outlined by the Development Programme Group (DPG) for timescales and funding.

### Health and Safety

All Asset projects are delivered considering Health and Safety standards and requirements. For each project The Construction (Design and Management) Regulations (NI) 2016 (CDM) are enforced with requirements for competent workers, a construction phase plan and the preparation of health and safety files. To ensure Health and Safety compliance the Clerk of Works within the Assets Team will carry out Health and Safety audits whilst projects are on site, reporting any non-conformances and recommending corrective actions to the relevant Building Surveyor.

### Integrated Management Systems

The Assets Team have the aspiration to manage all risk through ISO management systems, building upon their existing quality Management System and achieving a fully integrated system of ISO9001 for Quality, ISO45001 for Health and Safety and ISO14001 for Environmental management. This will achieve robust systems to ensure statutory compliance and best practice. Having ISO45001 in place for all operational Health and Safety aspects will ensure the safety of our tenants through established processes which will be rigorously audited both internal and externally.



### Fairview Court, Newtownabbey

After a request from an Occupational Therapist, an extension was built at Fairview Court, Newtownabbey to accommodate a ground floor bathroom, as a requirement for a family with a disabled child.



100% of asbestos  
condition surveys will  
be completed annually

# #2 Great Services

## Strategic Theme: Quality Management

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A Quality Management System (QMS) has been implemented to include all the activities carried out by the Assets Team. The purpose of the QMS is to streamline procedures and processes to increase efficiencies, identify and improve risk management, maintain high levels of customer satisfaction and continually improve the service provided by the Assets Team. This is achieved by identifying risks and setting objectives and targets. By following a programme of internal audits non-conformances are identified and improvement measures are put into place.

The current QMS has been accredited to ISO9001 and we aim to keep this standard in place, building to develop a fully integrated system. Following the ISO ethos of Plan, Do, Check, Act, ensures the continual improvement of our services, resulting in the creation of a self-auditing compliance culture within the Assets Department.



**Assets Team attain  
IOS9001 accreditation**

The Assets Team aspire to implementing a fully integrated Management System to included ISO9001 for Quality, ISO14001 for Environmental and ISO45001 for Health and Safety management

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## #2 Great Services

### Strategic Theme: **Staff Development**

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Having a quality management system in place has enabled the Assets Team to identify required training areas for staff. The Building Surveyors will work towards either RICS or CIOB Chartered status. A programme of CPD events will be arranged and attended by the team each year. The Assets Manager has achieved the status of Assigned Certifier for the Society of Chartered Surveyors Ireland.

Having Chartered Building Surveyors will develop the in-house design team expertise and put us in a strong position to tender for contractors from external clients.



#### **Church Road, Hollywood**

The in-house design team have been working in partnership with Abbeyfield and Wesley acting as principle designer and project manager to remodel Church Road, Hollywood.

The property was made up of 9 bedsit flats with use of a communal bathroom. The Assets in-house design team remodelled and upgraded the property to include an extension to accommodate 9 bedsit flats with en-suite bathrooms and upgraded the heating and electrical systems.



# #3 Value for Money

## Strategic Theme: Efficiency Savings

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The Building Surveyors within the Assets Team are producing option appraisals to support the business case for the best long term use of assets. This provides options for properties that are difficult to let, such as the option for remodelling, refurbishing or disposal. This is an important in-house service to ensure that Choice are maximising their assets. This service provides the Choice Senior Management Team with invaluable information for decision making.

Providing this service in-house reduces the dependence on external building consultancy and the associated costs.

The Association has aspirations to develop and grow the in-house design team to include building surveying service delivery for external clients. This will be done by developing a business plan on the expansion of the service. Offering external services will generate an external income stream for Choice.



### Claremont House - Option appraisal for re-modelling

Claremont House was originally constructed by SHAC in the mid-1990s, providing purpose-built shared student accommodation. Over the years expectations changed resulting in increased voids at this site.

Based upon an in-depth appraisal, the Assets Team developed an investment strategy to address the issues that had adversely affected Claremont House.

Remodelling proposals were agreed that would deliver a mix of 'new' housing at Claremont House:

- 15nr 2-person 1-bedroom self-contained apartments
- 2nr 1-person 1-bedroom self-contained apartments

On completion, the new units became available for general needs allocation.

The implementation of this project has made a significant contribution to meeting the Housing need within the West Bank of the City and has ensured sustainable delivery of high-quality homes, for both existing and prospective customers.



# #3 Value for Money

## Strategic Theme:

### External Services and Working in Partnership

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The Assets Team offer external services to other Housing Associations and agencies, such as Hail Housing and Abbeyfield and Wesley. Offering Building Surveying services through Service Level Agreements (SLA) and agreed contracts, this provides the Association with an income stream and raises the profile of Choice across the industry. This is an area that the Assets Team will build on with the development and growth of our in-house design team.

The Assets Team actively work in partnership with internal departments, such as the Supported Housing Team, to offer Building Surveyor services to Joint Managed Partners (JMP) providing options appraisals for re-modelling opportunities for supported housing, to enable JMPs to continue to provide excellent services from suitable buildings.

The Assets Team has developed strong working relationships across all departments within Choice. We will continue to work closely with colleagues in Property Services, Tenant and Client Services and Development to develop the housing database of property information which enables all teams to provide an excellent service to our customers. Having good data enables the Assets Team to plan improvements appropriately ensuring attribute lifecycles are maximised and projects are planned to ensure value for money.



#### **Bloomfield Road, Bangor**

The in-house design team have been working in partnership with Abbeyfield and Wesley acting as principle designer and project manager to remodel Bloomfield Road, Bangor.

The property was made up of 8 bedsit flats with use of a communal bathroom. The Assets in-house design team remodelled and upgraded the property to include 8 bedsit flats with en-suite bathrooms, replace windows and doors and carry out internal redecoration works.



# #4 Digital Transformation

## Strategic Theme:

### Data Management

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#### TEAMS

When the Assets Team took on the responsibility for asbestos compliance for Choice, the TEAMS online portal was launched. The TEAMS portal is a facility that all Choice staff and key contractors can access to obtain asbestos management surveys. Before any repair or work is carried out at a property or scheme the asbestos management report should be consulted for Health and Safety information.

The TEAMS portal is a live resource which is updated with new information as and when asbestos condition surveys are completed. The TEAMS portal is an advanced resource which moves away from keeping static reports on file which outdate quickly.

Staff from across the organisation and key staff from approved contractors have received training on how to use the system and have been provided with log in and passwords.

The TEAMS portal is managed centrally by the Assets Team, although staff throughout Choice are responsible for accessing the information that they require. The Assets Team will continue to develop this resource and promote the use of the portal to staff and contractors.

#### AutoCAD

The Building Surveyor's within the Assets Team have all been trained in the use of AutoCAD; in order to develop and grow the in-house design team, the technology within the office will need to be upgraded to facilitate the requirements of this software.

#### Active H

Active H mobile surveyor has been tested by the Building Surveyors, it is hoped that this technology can be further developed in partnership with the Choice ICT department to form a useful tool for onsite surveying and stock condition surveys. This would eradicate the need for manually recording stock condition surveys on templates then manually entering of data into Active H.





# Our Targets

# Our Targets

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We have identified 25 targets which we aim to achieve under this strategy, with these targets highlighted below and aligned with our Corporate Strategic Goals.

GREAT HOMES			
TARGET		YEAR 1	YEAR 2
1	Annual Stock Investment.	£10m	£10m
2	PMP projects taken on by the in house design team	£150k	£150k
3	Produce a Design Guide, standard details and specifications		✓
4	Carry out 20% review of all Stock Condition within the year.	✓	✓
5	Produce a plan to work towards achieving 100% of all pre2000 housing stock surveyed for asbestos.	✓	✓
6	Achieve at least a score of 35 (indicating a level of Very Good) from Considerate Constructors for all relevant PMP projects	✓	✓



GREAT SERVICES			
TARGET		YEAR 1	YEAR 2
7	In house design team will offer a range of Building Surveying services to external clients	✓	✓
8	Maintain the Quality Management System to ISO9001.	✓	✓
9	Achieve all of the targets we have set within the Quality Management System.	✓	✓
10	Develop a fully integrated Quality, Health, Safety and Environmental Management System (QSHE) Accredited to ISO9001, ISO14001 and ISO45001		✓
11	Achieve 100% of asbestos condition surveys annually.	✓	✓
12	All Building Surveyors will work towards either RICS or COIB membership. Achieving the required CPD hours annually.	✓	✓
13	Ensure all tenants are appropriately consulted at the various stages of any planned works.	✓	✓
14	Maintain 90% tenant satisfaction at the end of the year.	✓	✓
15	Achieve all major adaptations within DPG performance targets.	✓	✓
16	Complete option appraisals to support the business cases for the best long term use of Supported Housing units.	✓	✓
17	Assets Team to attend Intersection of Dementia and Design training.	✓	

VALUE FOR MONEY			
TARGET		YEAR 1	YEAR 2
18	Comprehensive project cost control guidelines developed and implemented.	✓	✓
19	In-house design team will carried out options appraisals.	✓	✓
20	Develop a business plan for the service delivery of the in-house design team.	✓	

DIGITAL TRANSFORMATION			
TARGET		YEAR 1	YEAR 2
21	Embed the use of the TEAMS portal for asbestos management surveys, across all relevant departments.	✓	✓
22	Carry out a full review of attributes within the Planned Maintenance module of Active H	✓	✓
23	Upgrade All Building Surveyors computers to a capacity to process AutoCAD.	✓	
24	Review our intranet content to ensure relevant assets information is available to staff	✓	✓
25	Review our website content and ensure that the success of projects is shared with our existing and potential customers	✓	✓

## How we will deliver our Strategy

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### Monitoring of Performance

Regular reviews will be carried out as part of our Quality Management System. Reports will be provided to the Group Director of Development and Assets, the Senior Management Team, the Development and Growth Committee, and our Board as appropriate. This Strategy has been formulated to align with our Corporate Strategy and other Strategies within the Association, and will be reviewed annually to ensure it continues to be aligned in this manner. Whilst specific targets have been set, this Strategy also acts as a framework and we will seek to examine other potential opportunities to deliver benefits to Choice and our customers.



### Resources

The Group Director of Development and Assets is responsible for the delivery of this strategy, with the Assets Manager responsible for implementing this strategy along with the support from the Assets Team and other staff throughout the organisation. Choice maintain a commitment to ensure that adequate resources are in place within the Asset Management Team, and across the organisation, to achieve the targets outlined in this strategy.



### Equality and Diversity

We have undertaken an Equality Impact Assessment to consider how this Asset Management Strategy will impact our tenants, service users and staff. This is particularly relevant to our diverse stakeholder base. The assessment considered the effects this strategy may have on people falling into the Northern Ireland Equality Commission's nine groupings.



### Funding

The targets and initiatives of the Asset Management Strategy will be funded in the main through the Association's reserves and rents. Where appropriate, we will seek grant funding and all opportunities to obtain external funding will be explored and recommendations proposed to management. In particular, options for investment where there is a financial payback will be explored along with alternative financial models.

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