



Pre Mobilisation Workshop for Procurement of Integrated Asset Management Model

For

East Devon District Council with Ian Williams

1st November 2018

At

Exmouth Town Hall, St Andrews Road, Exmouth EX8 1AW



Prepared by:

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1 Executive Summary

- 1.1.1 This workshop acted as an initial start-up event for the mobilisation of the Integrated Asset Management Model contract which will commence in the next few weeks.
- 1.1.2 As well as starting to look into the processes available for the mobilisation process , this workshop also helped to identify the aspirations of both internal and external stakeholders of East Devon and Ian Williams in the delivery of the Integrated Asset Management contract.
- 1.1.3 All the objectives of the workshop were met, and it was felt by all that the workshop provided a good starting point for the mobilisation process.



2 Workshop Report

2.1 Introduction to the Day

2.1.1 Mathew Baxter gave an introduction to the event summarised as follows:

- Mathew explained how important the mobilisation stages are. Despite this, he emphasised that today's purpose was an introduction and more of an insight into what the future holds, rather than formal role allocation. Also running through the day's agenda explaining the purpose of each part of the day.
- Mathew also explained that this workshop was in place to start the long-term mobilisation and that there would be more of these going forward, where people would be invited to their respective meetings dependant on their roles.

2.1.2 John Golding, Strategic Lead from EDDC, gave his formal introduction summarised as follows:

- John described the day as a good opportunity to start integrating with the Ian Williams team whilst getting to know each other. John outlined that EDDC looked at alternative options and processes, but he felt this procurement process has allowed them to be bespoke and look at the finer details.
- John emphasised that his team are aiming for a smooth transition, but also that this must be practical and fair for the tenants, which they don't want to lose sight of. In conclusion to his introduction, John added that he wanted today to set the tone of the process going forward, adding that he was confident in the resources within his team and those of Ian Williams and Echelon.

2.2 Participant Introductions

2.2.1 Mathew Baxter encouraged everyone to fully participate in today's workshop, put forward their specific views and challenge anything they didn't agree with. The solutions devised today will help shape the mobilisation in the future.

2.2.2 The delegates introduced themselves to the workshop as follows:

- Who are you?
- What is your role?
- What do you want to achieve today?

2.2.3 A list of workshop participants and their contact details are attached in **Appendix A**

2.2.4 Personal objectives for the day identified by the delegates included the following:

- Meet the Ian Williams team and get a feel for how they start to work in partnership;
- Work out how Ian Williams work and what they strive for;
- Gain clarity on the mobilisation period ;
- Get a feel for collaborative working and start as they mean to go on;
- Gain understanding of East Devon District Council's cultures and values and see how Ian Williams can buy into them;
- Make sure everyone shows the focus required into TUPE & IT, as they are regarded as big risks;
- Get an idea of how EDDC need to set up and how the allocations team need to set themselves up for the voids process;
- Understand the contract in more detail – in particular the KPI's;
- Put names to faces, build relationships and start to understand how EDDC's IT works; and
- Create the basics of collaborative working going forward, in particular look into IT as this can be fundamental to the mobilisation period as well as the contract as a whole.

2.2.5 The feedback of the workshop regarding people's personal objectives will be attached in the Appendices section in **Appendix B**

2.2.6 Following on from outlining objectives, the whole group participated in the 'boat rescue' team building exercise

2.3 Workshop Objectives

2.3.1 The aims of the workshop were to engage the EDDC and Ian Williams team in:

- Meet and establish a mobilisation team
- Establish roles and responsibilities for the mobilisation and the future & review mobilisation tools
- Review and summary of the procurement process
- Review key components of the successful Service Providers Offer
- Develop mutual objectives
- Agree future Core Group and sub-group structures
- Develop mobilisation action plan and timelines
- Risk review – identify key risks and mitigating actions

2.3.2 These objectives, and those identified by the delegates, were reviewed at the end of the workshop and it was agreed that they had been met. Feedback can be viewed in **Appendix B**.

2.4 Case Study and Previous Work

2.4.1 Mathew referred to a previous case study of BPHA & Ian Williams which Echelon procured a few years ago. There was a presentation on the mobilisation stages and Mathew drew comparisons and similarities between that project and the current collective work between EDDC and Ian Williams. **The presentation is also attached in the email.**

2.4.2 The comparisons and analysis were surrounding Bedford's Asset Management Services, their success factors and their areas to consider for improvement.

2.4.3 Following on from that the group looked at the journey so far during the procurement of East Devon District Council's Asset Management. In Summary:

- OJEU Issued 19th February 2018
- 7 SQ's Received (Selection Questionnaires)
- All Shortlisted to ISDS (Invitation to Submit Detailed Solution)
- 3 Bidders taken through to CPN process
- ISFT Issued and Evaluated (Invitation to Submit Final Tender)
- Ian Williams scored 92.13% (52.92% Quality/ Cost 39.21%)
- Cost differential less than 2% between all 3 bidders
- Leaseholder and Standstill Periods complete
- Contract Award not yet place

2.4.4 Mathew then reviewed some of the key points that were analysed 15 months ago at the Hearts & Minds workshop.

No.	Service Improvement	No. Dots
1	One-Stop Shop for Customer	5
2	Want an 'outstanding' delivery model	4
3	Ensure robust interface with Open Housing IT Platform	4
4	Ensure Health & Safety compliance – professional / appropriate	3
5	KPIs to be indisputable	3
6	Multi Skilled Operatives – task trained	2
7	Adopt Systems Thinking	2
8	Focus on 1 st time fix	2
9	Relationship based on trust	1
10	Real time data	1
11	High Levels of Customer Satisfaction	1
12	Transparency on both sides	1
13	Self-police quality control / post inspections	1
14	Early warning on safe-guarding	1
15	Educate Tenants of use of Home (i.e. Damp)	1

2.4.5 The group also looked at what the residents prioritised at the time of the workshop.

No.	Service Improvement
1	Flexible appointments to be offered at first point of contact
2	Flexible communications with online reporting
3	Introduction of Freephone number
4	Encourage feedback on service
5	Introduce reminders and call-a heads
6	Joint branding of service provider
7	Develop a proactive service
8	Utilise a multi-skilled workforce
9	Better supervision of operatives
10	More post inspections/quality control

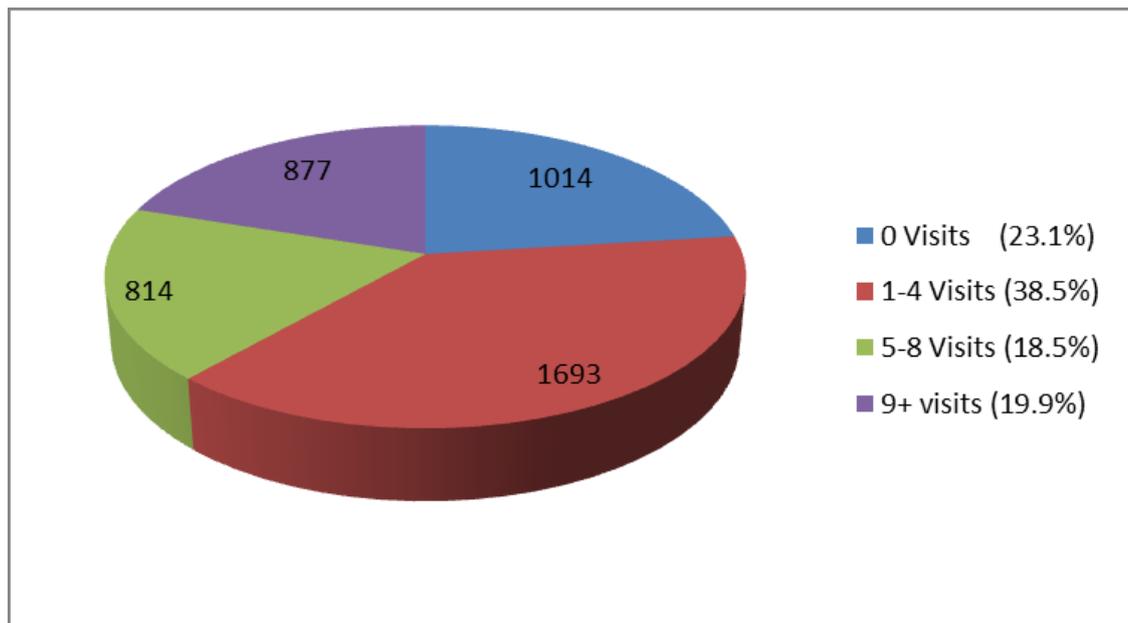


2.5 Reshaping Asset Management

2.5.1 Mathew presented the follow points surrounding asset management:

- Understanding the needs of the stock and the customers
- How much does each visit cost?
- Is there such a thing as an 'average' property?
- Use of Complete Property Service approach?
- Linking reactive and planned maintenance
- Why does the sector spend so much on voids?
- Incentivising Service Provider to drive down cost?
- Only real way to drive down cost and increase satisfaction is to reduce number of visits – Proactive thinking rather than Reactive thinking

2.5.2 Sample provided (from United Welsh)



2.6 Individual group work

2.6.1 For this part of the session Mathew asked the attendees to split into Ian Williams and East Devon District council and come up with 10-15 'refresh and review' ideas for each group:

2.6.2 The 10 ideas that Ian Williams came up with and then further elaborated on were:

1. Happy client
2. Happy customer
3. Collaborative working
4. Engaged employees
5. 'Invisible' IT
6. Cost efficiency over lifetime
7. Innovation and Passion shown throughout the contract
8. Model contract
9. Profitable
10. Paid on time

2.6.3 When expanding on their points they explained what the criteria for a happy working relationship was. This was things such as honesty and clarity when addressing issues. Being time efficient throughout the process and meeting the expectations of EDDC. Ian Williams expressed their desire for collaborative working on every level, from top to bottom of the tired structure. They want to be TUPE considerate of any new members of staff and educate them on Ian Williams' culture and values. Ian Williams expressed their views on looking into various commercial models, as they want open dialogue with EDDC throughout the contract.



Ian Williams Team

2.6.4 The 14 ideas that East Devon District Council came up with and then further elaborated on were:

- High customer service and satisfaction
- Communication and inter team
- That Ian Williams are trustworthy, honest and open
- Integrated working and learning about each other – EDDC, IW and residents
- Flexibility, lessons learnt from feedback (data/reviews/input)
- Collaboration and colocation – 1 team
- Clear structures
- ICT systems interface
- Compliance
- Consistency and resilience when dealing with good or bad news (all parties)
- Change management expectations
- Personal development opportunities
- Value for money and cost efficiency
- Maintain or improve standards together

2.6.5 EDDC expressed their desire for happy residents, as happy residents will make them happy. Communication is key to EDDC, they want honesty and clarity throughout the entire hierarchy. They want honesty and integrity when mistakes are made, with reactive responses to problems, whether it be on their behalf or Ian Williams’.

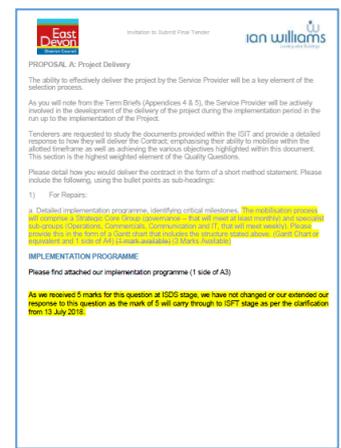
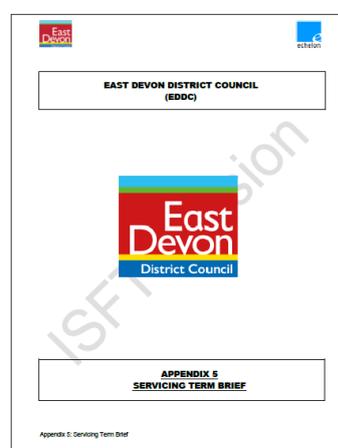
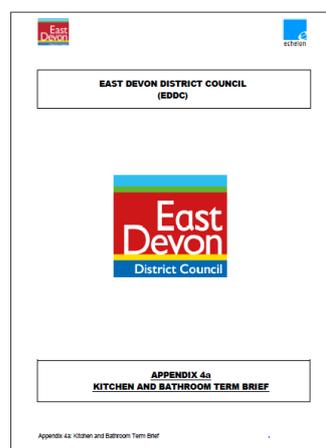
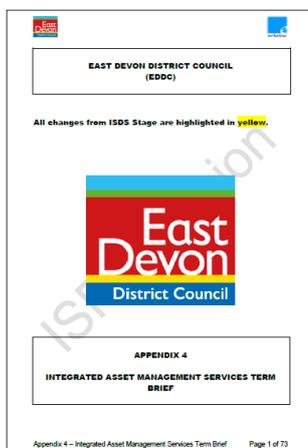
2.6.6 Interactive working comes with learning from an EDDC perspective, they want to learn as much as possible about Ian Williams and vice versa. A ‘1 working team’ image is their goal, they would also like to gain a clear understanding of who works with who in all roles across the project.



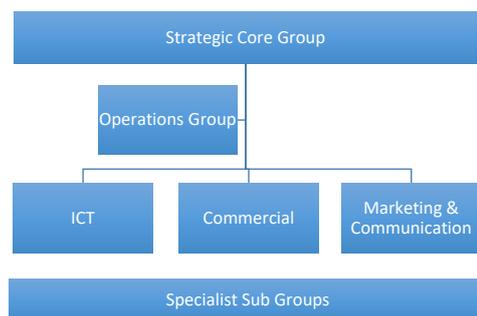
The EDDC Team

2.7 Review of key documents

- 2.7.1 Mathew ran the group through some key documents and what they will consist of. These will be reviewed further in the future in more detail with the correct group.
- 2.7.2 The group looked at the potential structure chart and collectively came up with some potential sub groups for when the contract is up and running.



2.7.3 Proposed mobilisation structure (initial)



- 2.7.4 It was agreed that the structure would broadly follow the structure but with the addition of Steering Group that will sit between SCG and Operations, made up of the chairs of each group and also a operational delivery group under the operations group.

2.8 First draft of groups followed by brief group activity

- 2.8.1 After lunch the group gave some thought to the possible groups going forward, allocating people into their appropriate teams, even though none of these suggestions remain official as of yet, just guidelines.
- 2.8.2 Chairs for each group are identified with a ©.

Operations:

East Devon District Council	Ian Williams
Alex	Craig (S)
Denise	© Claire Harris
Amy	Stephen
Sue	TBC
Graham	TBC
Kerry	
Peter (T)	
Tracy	
Tim	

ICT:

© Kerry	Stephen
Simon	Mike
Natalie	
Rob	

Commercial:

Rob	Craig
Amy	Paul
Alex	+QS
Natalie	+Branch Manager
© Denise	
Graham	

Social Value:

Tenant Rep	Craig
Sue	Claire
Community Development Rep	Ian Williams Academy
Jim Elson	Ian Williams Foundation
Denise	
Management Support Officer	



Commercial Group

Delivery Group:

Denise	Craig
Tracy	Claire
© Alex	Business Manager
Repairs Advisor	TUPE?
Repairs Surveyor	TBC
Michelle	
Graham	
MSO	
Tenant Rep	

Communication:

Comms team rep	Craig
© Denise	Claire
Tenant rep	TBC
Amy	TBC
Mobile Support Office	TBC
Repairs Advisor	
Maintenance Supervisor	
Councillor Stott	

- 2.8.3 Given that some people that were included in the provisional groups were not in attendance at the workshop, the group split into their small groups where possible. Each group looked at what the mobilisation period would consist of from their perspective, as well as how they could address any potential problems moving forward and just general areas of discussion

Commercial group 'The Deal':

1. The contract – Summary & Distribution as well as spreading understanding for the model – insert training where required
2. Areas of risk and how they can be countered
3. Invoicing and Accounting – Definition of prompt payment, review of cost efficiency, process for clarifications – variations
4. KPI's – develop definition and understanding, loom at evaluation and review of KPI's, link to payment process
5. MI – Define repairs needed for processes, open book review, provisions of info to teams, issues around where data sits and how to access it, stock condition data components, adaptations maximising collection, informed decisions.

IT :

1. Interface layout / mapping / definition
2. Who raises job / web services
3. Flow map process
4. Common Terminology
5. Variations
6. Pricing
7. Location / Tenant export
8. Clear directive from operations
9. Skype meetings
10. IT down – Action Plan
11. GDPR
12. Implementing new process onto current OH and testing it
13. Testing time?
14. Working in parallel with OCD and new process on OH
15. Audit

Operational Delivery:

1. Process Mapping
2. Recalls
3. Repairs
4. Mutual Exchange
5. Scheme for days sheltered accommodation
6. Voids
7. Variations – Inclusions / Exclusions – PPP > SOR – PPV > SOR
8. Multiple Repairs
9. Recharges
10. Contingency planning – vulnerable residents
11. Communications
12. Property MOTS – components replacement
13. Compliance – Health & Safety / Smoke alarms
14. Clarification of training / Expectation of roles – Surveyor
15. Customer Calls – Scheduling
16. Handypersons



3 Risk identification and Objective Review

3.1.1 The group identified potential risks that they could be exposed to throughout the mobilisation period. They were as follows:

- Reliance on IT working as envisaged
- Resourcing – business as usual must carry on
- Clarity on roles and responsibilities through mobilisation
- Tenant demand on new service
- Ian Williams struggle to recruit
- Timescales
- Disruption from incumbent contractors
- Ian Williams premises not ready on time
- Contract not officially signed
- Ian Williams not having fleet supplied and branded
- TUPE information and transition in general – consultation with staff
- Cultural and value alignment (TUPE staff too)
- Contractor could suffer from commercial difficulties in a general perspective, not solely to the contract with EDDC
- Communication and behaviours

3.1.2 The workshop concluded after the risk analysis. The group gave a summary of their individual experiences of the day and they were as summarised in **Appendix B**.



Appendices

Appendix A: Workshop Participants

Name	Role	Org.	Telephone	E-Mail
Mathew Baxter	Managing Director	Echelon	01707 339800	mathew@echelonconsultancy.co.uk
Ellis Hanks	Finance Assistant	Echelon	01707 339800	ellis@echelonconsultancy.co.uk
Stephen Lye	IT Project Manager	IW		Stephen.lye@ianwilliams.co.uk
Amy Gilbert-Jeans	Acting Housing Service Lead	EDDC		Agilbert-jeans@eastdevon.gov.uk
Michelle Davidson	Compliance Surveyor	EDDC		mdavidson@eastdevon.gov.uk
Kerry Spittle	Housing Systems Manager	EDDC		Kspittle@eastdevon.gov.uk
Tim Laurence-Othen	Project Officer	EDDC		Tlaurence-often@eastdevon.gov.uk
Natalie Brown	Information Officer	EDDC		Nabrown@eastdevon.gov.uk
Mike Dunstan	IT Manager	IW		Mike.Dunstan@ianwilliams.co.uk
Simon Landfear	Strata	Strata		Simon-landfear@strata.solutions
Steve Mcnaughton	Mobile Support Officer	EDDC	01395 227 884	smcnaughton@eastdevon.gov.uk
Paul Manning	Maintenance Surveyor	EDDC	07813 343 829	pmanning@eastdevon.gov.uk
Della Kelly	Housing Repairs Advisors	EDDC	07817 394 991	dkelly@eastdevon.gov.uk
Colin Rowland	Surveyor	EDDC	07875 284 847	crowland@eastdevon.gov.uk
Kate Green	General Manager	IW	07736 728 545	Kate.green@ianwilliams.co.uk
Denise Reeves	Property Asset Manager	EDDC	07817 394 991	dreeves@eastdevon.gov.uk
Andrew Mitchell	Housing Needs & Strategy Manager	EDDC	01395 517 469	Amitchell@eastdevon.gov.uk
Tracy Humphrey	Allocations	EDDC	01395 511 469	thumphrey@eastdevon.gov.uk
Craig Jones	General Manager	IW	07738 502 326	Craig.jones@ianwilliams.co.uk
Sue Bewes	Landlord Services Manager	EDDC	01395 514 551	sbewes@eastdevon.gov.uk
Jim Elson	Cabinet Member	EDDC	01385 264 731	jelson@eastdevon.gov.uk
Peter Sullivan	EDDC Tenant Rep	EDDC	01395 515 033	pasully@outlook.com
Alex Slattery	Senior Technical Officer	EDDC	07813 343 844	aslattery@eastdevon.gov.uk
Rob Ward	Accountant	EDDC	07963 778 945	rob.ward@eastdevon.gov.uk
John Golding	Strategic Lead	EDDC	01395 343 844	jgolding@eastdevon.gov.uk
Jayne Cox	AM Operations Director	IW	07979 548 403	Jayne.m.cox@ianwilliams.co.uk
Pauline Stott	Councillor		0797 465 847	paulinestott@btinternet.co.uk
Graham Baker	Senior Technical Officer	EDDC	07875 638 919	gbaker@eastdevon.gov.uk

Appendix B: Workshop Feedback

Feedback provided regarding the workshop was as follows:

- Got to know Ian Williams and East Devon District Council more and objectives were met
- Enjoyable and interactive day, good balance of group work and mixed work
- Multiple members of the group felt that they had got everything out of the session that they wanted
- Knowledgeable day – learnt a lot about mobilisation process – time management proves key going forward
- Very informative and educational day
- Refreshing and reassuring to see the amount of enthusiasm shown as well as the positive approach to change.