

FORTH HOUSING ASSOCIATION LIMITED

Asset Management Investment Plan

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| Guidance: | The Scottish Housing Quality Standard (SHQS) 2004 The Energy Efficiency Standard for Social Housing (EESH) 2013 The Right to Repair elements of the Housing Scotland Act 2001. The Procurement Reform (Scotland) Act 2014 |
| Regulatory Standards Of Governance and Financial Management | Standard 4 – 4.3 Standard 7 - 7.5 |



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Forth Housing Association Ltd.

Asset Management Investment Plan (AMIP) 2020-2025

ASSET MANAGEMENT INVESTMENT PLAN 2020-2025

Introduction

The purpose of Forth's Asset Management and Investment Plan (AMIP) is to provide a road map which details how we will maintain our properties to a high standard and includes all component replacements both internally/externally and ancillary. It allows the Association to optimise the life of its physical assets, which are its housing stock, whilst achieving desired service levels and mitigating risk. This ensures our properties are safe and compliant with the regulatory requirements of SHQS/ESSH.

As part of the Association's internal management planning process, the Asset Management Investment Plan represents a resource plan which identifies what is needed to allow strategic objectives to be translated into courses of action and the financial resources needed to implement these. As such, it forms an important tool for effective internal management planning along with other plans including the Strategy and Development Funding Plan, financial budgets, and the Scottish Housing Quality Standard Delivery Plan to allow the organisation to fulfil its objectives.

AMIP Strategy Development

This AMIP has been developed through consultation with the Management Committee and Management Team and considers customer feedback received through various satisfaction surveys including feedback from liaising with our tenants directly. The AMIP has incorporated aspects found within Forth Housing Association's Business Plan and the relevant Statutory Frameworks we work within to ensure we comply with the Scottish Government and Scottish Housing Regulators Standards for Asset Management and Investment. It also takes into account our Internal Management Plan and the associated Risk Registers which are directly aligned with strategic development. The AMIP has been developed based on the Associations component life cycles and current component condition.

Information System

The Housing Management System incorporates a planned maintenance module. This planned maintenance module has been extensively developed, allowing us to input data based on current component life cycle values and stock condition data. The outcome is that the Association is able to produce a 30-year planned maintenance investment plan on current stock. For the purposes of the AMIP, a five yearly investment plan will be developed which will be subject to verification by ways of surveys and external stock condition verification. Budget approval is sought in the preceding year from the Management Committee.

Statutory Framework

The AMIP has considered the following statutory compliance standards:

- The Scottish Housing Quality Standard (SHQS), which was introduced by the Scottish Government in February 2004 to establish a baseline standard for social housing.
- The Energy Efficiency Standard for Social Housing (EESH 1 and EESH 2), which evolved out of the Scottish Government's Sustainable Housing Strategy (2013).
- The Right to Repair elements of the Housing Scotland Act 2001
- The Procurement Reform (Scotland) Act 2014, which includes provision for Community Benefits

Stock condition

We have obtained significant knowledge of our stock through inspections and stock condition survey data. We have 871 properties, of which 6 are post war properties of traditional construction obtained by the Association through the Mortgage to Rent scheme. These properties were upgraded to the current standards on an individual basis as came into Forth's ownership. All of Forth's housing stock has been built since 1991 and has been regularly maintained on both a reactive and cyclical basis since then. The stock condition surveys which have been undertaken indicate that all of our new build stock currently complies with the Scottish Housing Quality Standard criteria.

The life cycle costing exercise provides 30 year elementary costed schedules for cyclical maintenance for each development based on the maintenance of current standards, to allow the Association to plan and budget for works required on a systematic basis. We recognise that as a minimum, all our properties require to meet the Scottish Housing Quality Standard and the Energy Efficiency Standard for Social Housing. This is associated with mandatory checks and certification relating to gas installations, fire safety and electrical safety.

We recognise it is possible to achieve these standards, but we will still have housing that's functionally out with the core areas. We also recognise the existing standards do not cover the external built environment, including fencing, streetscape and parking.

Taking all these factors into account, we will seek to upgrade our housing stock by using our default component life cycle where possible. However, some developments may need component replacements earlier due to the deterioration of components which are evidenced through stock condition data and real time inspections. As a counterbalance and to provide consistency with our financial planning, if components are found to be in good condition/fit for purpose, the Association may delay the replacement of certain non-essential components and instruct their replacement at a later date.

Strategic context and current position

Through the implementation of the AMIP, Forth will meet its primary aim “to provide good quality, well managed, barrier free, affordable housing for rent and shared ownership in the Stirling area, for those persons in greatest need”.

This Plan will also assist in meeting the Association’s following strategic objectives:

- To strive to continually meet the recognised regulatory requirements and Performance Standards for Social Landlords and to establish the necessary internal monitoring procedures.
- To provide sensitive management of properties to the highest possible standards.
- To facilitate tenant participation by ensuring tenants have the opportunity to influence decisions and take part in matters which affect the quality of their lives.
- To provide housing which focuses on tenant comfort and security, low running costs, high thermal insulation, low maintenance costs, barrier free environment and high environmental sustainability.
- To ensure financial viability by making the best use of resources in all the Association’s activities whilst ensuring risk management principals are adhered to.

Forth’s AMIP will strengthen the Association’s approach to Planned/Cyclical programmes of work and support the aims of the Maintenance Strategy.

The Association has carried out component life cycle exercises for all completed developments since 31 March 2005 and has continued to carry out surveys 3 yearly as required for the Scottish Housing Quality Standard Delivery Plan. These surveys will act as baseline data for the Asset Management Investment Plan. This will be reviewed and updated every five years with new developments being added after their defects liability period has expired.

Key Features of the Asset Management Plan

Developing a Strategy

The Association's Asset Management Investment Plan has the primary aims of:

- Developing and implementing a Cyclical Maintenance programme which protects and enhances the long-term condition of the property
- Developing and implementing a Planned Maintenance programme, which replaces or repairs an element/component, which has reached the end of its useful life
- Developing and implementing a programme of Planned Property Condition Surveys to monitor the Association's stock
- Involving residents in decisions regarding the repair, maintenance and improvement of their homes where relevant and appropriate
- Programming of cyclical and planned maintenance with regard to prudent financial planning and control and setting of budgets
- Regularly reviewing cyclical and planned maintenance policies and procedures to ensure that Forth is implementing best practice and fulfilling its statutory obligations as a Registered Social Landlord
- Complimenting other existing strategic plans of Forth Housing such as the SDFP, the Wider Action Strategy and the Resource Management Plan.
- To provide 30 year financial projections on element/component replacements.

Inventorying Assets

The initial key step in managing assets is determining their location and condition and this has been carried out by undertaking a minimum 10% stock condition survey every 3 years. Data is collected on construction materials, physical condition and remaining useful life. Cost data is then compiled on a scheme by scheme basis for individual building elements. It is proposed to enlarge this initial survey through time with further surveys.

Planning for Renewal and Replacement

The physical condition and cost data developed in the initial stock condition survey combined with the life cycle costing exercise will provide a basis for planning to carry out renewal or replacement. Decisions must be made on a life cycle basis so that the trade-off between maintenance cost and replacement cost can be maintained.

Monitor and review effectiveness of the Plan

In order to assess whether current practices are effective and programmes for proposed works require to be altered the Plan will be reviewed annually

Procedure

- The baseline data for the Cyclical and Planned Maintenance programmes has been obtained from Forth's 10% stock condition survey and regular void and reactive inspections. These exercises, coupled with current up to date contract costs including component replacement life cycles, allow the Association to update its planned maintenance module with current live information based on current data. This represents the Building Cost Information Service (BCIS) and provides realistic building cost information to meet the requirements for financial projections.
- Life cycle costing exercises will be reviewed annually, with budgets for five-year Cyclical and Planned Maintenance programmes being submitted annually to the Management Committee for approval.
- Methods of procurement including the potential for partnering and supply chain agreements with contractors, and contract conditions suited to maintenance works will ensure that the most effective systems are used to deliver the aims and objectives of the AMIP, through the Cyclical and Planned Maintenance programmes. The methods of both Planned and Cyclical works will be carried out in accordance with the Procurement Reform (Scotland) Act 2014. Dependant on the contract type and size, the procurement method can range from quick quotes, to route 1 and 2 journeys.
- Our tenants' involvement in Cyclical and Planned maintenance works will be facilitated through newsletters advising of planned works, tenants' meetings, liaison with the Property Services Department. Tenant's views on the delivery of the projects will be sought through surveys and we will take appropriate action to remedy problems or to amend policies and /or procedure identified by these processes.
- Regular reporting, covering expenditure, progress and performance will be produced to inform the Management Committee, staff and tenants. Where

appropriate, the Association will seek to compare its performance against similar organisations, with a view to benchmarking, reviewing and improving the service.

Components life cycle replacements and mandatory checks.

The table below shows our component list and life cycle expectancy.

| Component | Component life |
|-------------------------------|-------------------------|
| Bathroom replacement | 25 |
| Cloak room sanitary ware | 25 |
| Gutter clean close | 2 Yearly or as required |
| Gutter clean house | 2 Yearly or as required |
| Combi boiler | 18 |
| Radiators and pipework | 36 |
| Door entry rep | 30 |
| EICR Tenancy | 5 |
| EICR Close | 5 |
| Emergency lighting test | 1 |
| Ext Front door rep | 30 |
| Ext Rear door rep | 30 |
| Ext close front security door | 30 |
| Ext close rear security door | 30 |
| Painter work Int Close | 7 |
| Painter work House | 7 |
| Painter work Block | 7 |
| Fences Gates | 30 |
| Internal door rep | 40 |
| Kitchen replacement | 18 |
| Path replacement | 40 |
| Rewire property | 35 |
| Roof replacement | 45 |
| Roof replacement block | 45 |
| Wet room replacement | 25 |
| Roughcast property | 45 |
| Window rep House | 30 |
| Window rep close | 30 |

Forth Housing Asset Management Investment Plan 2020-2021

| PLANNED | STREET | NO OF PROPERTIES |
|------------------------|----------------------------|-------------------------|
| Bathrooms | Bruce View | |
| | Myles House | 29 |
| Window Replacement | Barn Rd (3-31) | 14 |
| Gas Boiler Replacement | 8 Chapelcroft (HMO) | 1 |
| | 37 Bruce Street (HMO) | 1 |
| | Cowane St | |
| | Cooperage Quay | |
| | Cask Crescent | |
| | Bruce Street | |
| | Abbey Row | 66 |
| Kitchen Replacement | Cooperage Quay | |
| | Cask Crescent | |
| | Abbey Road | 50 |
| | Bruce St | 4 |
| | 37 Bruce St | 1 |
| | 8 Chapelcroft | 3 |
| CYCLICAL | | |
| External Painting | Clayhills | 48 |
| | Baker St/Morris Terrace | 18 |
| | Riverside | 50 |
| | Colliers Rd/Hirst Crescent | 35 |
| | Chapelcroft | 3 |
| | Fleurs Park | 1 |
| EICR | | |
| Tenancy | Bruce St | 5 |
| | Chapelcroft | 3 |
| | Adamson Place | 16 |
| | Riverside | 56 |
| | Clayhills | 48 |
| | De Moray Court | 40 |
| | Gillespie Place | 3 |
| | Vorlich Crescent | 1 |
| | Myles House | 10 |
| GAS SERVICING | | 89 |

Forth Housing Asset Management Investment Plan 2021-2022

| PLANNED | STREET | NO OF PROPERTIES |
|-----------------------------|---------------------------|-------------------------|
| Bathrooms | Colliers Road/Hirst Court | 35 |
| | Gillespie Terrace | 26 |
| Close door and entry system | Colquhoun St/Barn Rd | 6 Blocks |
| Close Windows | Colquhoun St | 3 |
| Windows Tenancy | Colquhoun St | 12 |
| Boiler | Waulker Ave | |
| | Huntly Cres | |
| | Cordiner Close | |
| | Auld School Wynd | 47 |
| External Doors | Colquhoun St/Barn Rd | 26 |
| Kitchens | Waulker Avenue | |
| | Huntley Crescent | |
| | Cordiner Close | |
| | Auld School Wynd | 47 |
| | | |
| CYCLICAL | | |
| Painting Block | Clement Loan | |
| | Muirend Road | |
| | Flint Crescent | |
| | De Moray Court | 1 |
| Painting Close | 17-23 Milton Brae | |
| | 3-15 Milton Brae | |
| | Cowane St | |
| | 33-39 Barn Road | 8 closes |
| Painting Houses | Old Doune Rd | 15 |
| | Gillespie Place | 3 |
| | Vorlich Place | 1 |
| | Wallace Gardens | 1 |
| | Flint Crescent | 1 |
| EICR Closes | Colquhoun St | 3 |
| | Barn Road | 3 |
| | Clayhills Drive | 3 |
| | Cowane St | 1 |
| EICR Property | Flint Crescent | 32 |
| | Cowane St | 8 |
| | Wordie Road | 12 |
| | Gateside Road | 11 |
| | Fisher Row | 15 |
| | Drip Road | 6 |

| | | |
|---------------|------------------|-----|
| | Gordon Square | 10 |
| | Winchell Place | 19 |
| | Milnepark Road | 10 |
| | Bogend road | 3 |
| | Bogside Road | 8 |
| | Earlsburn Avenue | 8 |
| | Hilton Cowie | 1 |
| | Tannery Lane | 20 |
| | Queen Street | 4 |
| | Colquhoun Street | 12 |
| | Bryden Road | 12 |
| GAS SERVICING | | 849 |

Forth Housing Asset Management Investment Plan 2022-2023

| PLANNED | STREET | NO OF PROPERTIES |
|----------------------|------------------------------------|-------------------------|
| Bathrooms | Flint Crescent | 30 |
| CYCLICAL | | |
| Painting | Adamson Place | 16 |
| | Tannery Lane | 24 |
| | Queen St | 24 |
| | King Robert Court | 18 |
| | Auld School Wynd | 17 |
| | Stirling Road Fallin | 1 |
| EICR Close | Wordie Road/Gateside Road | 2 Blocks |
| EICR Tenant | Flint Crescent | 32 |
| | Cowane St | 8 |
| | Wordie Road/Gateside Road | 23 |
| | Fisher Row/Gordon Square/Drip Road | 50 |
| | Winchel Place | |
| | Milnepark Road | 13 |
| | Bogside | 8 |
| | Earslburn Avenue | 8 |
| | Tannery Lane/Queen St | 8 |
| | Stirling Place | 20 |
| | Colquhoun St | 12 |
| | Bryden Road | 12 |
| | Hilton | 1 |
| GAS SERVICING | | 849 |

Forth Housing Asset Management Investment Plan 2023-24

| PLANNED | STREET | NO OF PROPERTIES |
|--------------------|---------------------|------------------|
| Bathrooms | Milnepark /Bog-side | 13 |
| | Stirling Place | 18 |
| Boiler Replacement | Vorlich | 1 |
| | Muirend Road | 4 |
| | Gillespie Place | 3 |
| | De Moray | 40 |
| | | |
| External Doors | Barnsdale Road | 17 |
| External Rear Door | Barnsdale Road | 2 |
| Kitchens | De Moray | 40 |
| | Vorlich | 1 |
| | Gillespie Place | 3 |
| | Muirend Road | 4 |
| Window Replacement | Barnsdale Road | 17 |
| Cyclical Painting | Craighall Court | 14 |
| | Craighall Street | 5 |
| | Raploch Rd | 8 |
| | Cultenhove Cres | 20 |
| | Cultenhove Road | 10 |
| | Huntly Crescent | 8 |
| | Cordiner Close | 11 |
| | Chapel Croft | 3 |
| | Earlsburn Avenue | 8 |
| | Waulker Ave | 2 |
| | EICR Close | Milton Brae |
| EICR Tenancy | Barnsdale Road | 19 |
| | Old Doune Rd | 7 |
| | Clement Loan | 8 |
| | Stirling Road | 1 |
| | Wallace Gardens | 1 |
| | 5A Castlevale | 1 |
| | Fleurs Pak | 1 |
| | Edzell Drive | 6 |
| | Ledl View | 6 |
| | Johnstone Ave | 11 |
| Hope St | 24 | |

| | | |
|---------------|------------------------|-----|
| | Bruce View | 20 |
| | Baker St/Morris Tce | 16 |
| | Monument View | 12 |
| | King Robert Court | 18 |
| | Crosbies Court | 18 |
| | Hilton | 1 |
| GAS SERVICING | | 849 |

Forth Housing Asset Management Investment Plan 2024 -25

| PLANNED | STREET | NO OF PROPERTIES |
|------------------------|----------------------------------|------------------|
| Close Door | Forth St | 1 |
| Close Windows Front | Forth St | 1 |
| Tenant Window | Forth St | 6 |
| | Queen St/Tannery Lane | 24 |
| Cyclical Painting | Archie Bone Way | 42 |
| | Wordie Rd/Gateside Rd | 23 |
| | Barnsdale Rd | 19 |
| | Bogside | 8 |
| | Hilton | 1 |
| EICR CLOSE | Forth St | |
| | Barn Rd 33-39 | |
| EICR Tenant | Forth St | 6 |
| | Mayfield St | 1 |
| | Cultenhove Rd | 1 |
| | Craighall Court | 14 |
| | Raploch Road | 8 |
| | Huntly Crescent | 8 |
| | Craighall St | 5 |
| | Cordiner Close | 10 |
| | Barn Rd | 4 |
| | Thistle Place/Men- zies Drive | 11 |
| GAS SERVICING | | 849 |

