



# Service Overview

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*decisions for tomorrow made today*

## Asprey Solutions



Asprey Solutions is the business created from the e-statePro social housing consultancy arm of Building Performance Group Limited (BPG) and consulting, planning and IT specialists within its partnering organisation Asprey Management Solutions Limited.

Asprey Solutions combines the asset management, IT and financial strategy specialists who created the e-statePro asset management software and ProSurvey handheld data capture software.

The team has perfected an easy to use suite of complex data collection, analysis and modelling tools for social housing landlords in response to ever-increasing commercial demands and regulatory, Decent Homes, best practice, best value, etc agendas.

Our differentiator and key benefit is the combination of the service – Asprey’s consultancy services – and the e-statePro and ProSurvey software systems – as an holistic solution. The experience of our consulting team alongside our clients, ODPM and the Housing Corporation during asset management reforms of recent years is made available to all our clients, who can take comfort from our demonstrable experience and faith in our own systems and approaches to creating excellent asset management planning and decision support systems.



## Consultancy

Implementation of e-statePro can establish an entire forecasting regime and supporting systems. Rather than attempt extensive information requirements planning and information gathering exercises before implementation, we ensure that clients become accustomed to overall issues by a swift implementation of e-statePro based on available data.

Together with Asprey's consultants, clients can then assess the level to which they want and need to refine their own data and systems within e-statePro in an informed manner.



For these reasons, we have a standard approach to implementing the e-statePro asset management software - plus an optional range of consulting services aimed at tailoring overall data management and related business processes in line with each user's requirements.

## The e-statePro Approach

Our consulting services aim to revisit each of the following standard implementation steps and leave a continuous improvement process for the user:

- ▶ **Step 1** Define standard outputs
- ▶ **Step 2** Establish data required
- ▶ **Step 3** Structure and configure data
- ▶ **Step 4** Collect and map data
- ▶ **Step 5** Install system and train users
- ▶ **Step 6** User acceptance, baseline analysis and reporting

## Step 1 Define Standard Outputs



The e-statePro software is designed with the principal objective of producing, amongst other things, planned maintenance cost forecasts, 'Decent Homes' assessments and energy rating calculations in a range of standard reports. Through a series of easy-to-use 'wizards', reports are configurable to give flexibility in the level of detail and the time period reported upon.

We facilitate workshops to identify an organisation-wide standard data structure, setting out the fields and values that the e-statePro software will have populated in order to process and generate the reports required by the organisation. We will help you to keep this broadly in line with available and readily collectable data in the interests of an achievable implementation objective.

We understand that asset management data is dynamic and that your ongoing maintenance and repair activities will

From our experience, potential data sources include:

- Housing Management System databases.
- Previous stock condition survey databases.
- Cyclical maintenance, voids maintenance and responsive repairs databases.
- Previously completed and ongoing capital works programmes.
- Electrical safety testing and/or gas servicing and safety records.
- Records of acquisition, disposal, refurbishment and new build development.

By means of a workshop we will seek to agree the full extent of your initial system configuration requirements and familiarise you with these key drivers of forecasting accuracy because this is a continuous improvement issue.

Optionally, our consultants can carry out a more extensive requirements capture, and execute it, when familiarity with the system is achieved post-implementation, using our previous experience with a variety of client types, we seek to ensure that both immediate requirements and longer-term strategic objectives are considered, and to identify the full range and scope of the reports relevant to your needs.

## Step 2 Establish Data Required

constantly impact on the accuracy of data held in the system.

For this reason, we recommend agreement of a period of time and a 'cut-off' date, typically 3 to 6 weeks from instigation of data collation, during which you will complete the initial data input as far as possible. The resulting asset management database is used to establish a baseline position that can then be continuously improved with better data, as it becomes available and is incorporated into the system.



### ► Step 3 Structure and Configure Data

**'Stock categorisation'** is one of the most important aspects of the database to resolve. In most cases, there will be less than 100% information on the stock and it is therefore necessary to clearly define groups of properties that are generally of similar age, size, construction, archetype and/or geographical location, and which have been maintained to the same general standard. This enables meaningful extrapolation from assets with representative data to those assets of the same type not represented.

'Stock categorisation' defines, in large part, the level of detail at which data can be reported. It is vital to ensuring the adequacy of the data used for reporting and forecasting. It is only possible to report at more detailed levels if the relevant information is captured.

**'Reporting hierarchies'** are also important to define early in the implementation process so that full reporting flexibility is available on installation. Typical hierarchies might be, Whole stock; region; local authority; scheme; estate; block; dwelling unit *Or* Local authority; contract area; neighbourhood; patch; estate; block; dwelling unit.

The system can accommodate more than one hierarchy against the same stock of assets. We will configure the system to utilise whichever hierarchy, or hierarchies, you require for reporting purposes.

**'Energy assessment rules'** are built up by way of a workshop. We believe it is essential that key members of your staff are involved in the configuration process and understand the importance and impact of data issues. It is always our intention to support your organisation's objectives, rather than impose our own solutions.

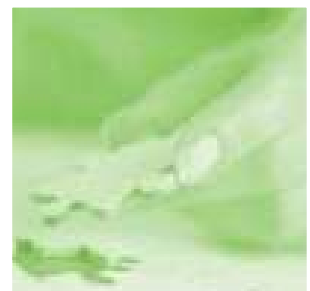
#### Some key considerations:

**"Decent Homes' rules'** are built up way of a workshop session in which your own interpretation of the ODPM guidance is applied to the data held in the database. We have developed the 'Rules Manager' to allow flexibility in this area as we have not yet encountered two organisations using the same interpretation.

**Your 'Costs, lives and repairs tables'** are essential components of the system database. Although a default is supplied, the basis of costing must be clear and must reflect the experience of your own organisation to ensure that the forecasts and reports generated by the software are realistic.

Increasingly important is the selection of the component lives held in the system. The 'Decent Homes' standard is particularly dependent upon both age and condition criteria being satisfied. Service lives applied to build dates, refurbishment dates, install dates etc. become more crucial in assessing potential failures as the target dates for compliance loom larger.

We recommend following the "80:20" approach to assembling the list of repairs used by the system to compile the assessments and forecasts. In our experience, trying to cater for the small proportion of stock that has unique characteristics or features usually leads to a doubling or tripling of the length of the repairs list, making it increasingly unmanageable. Concentration on the 'majority' side also serves to prevent 'skewing' of the results reported.



#### ▶ Step 4 Data Collation and Mapping



On completion of the first three steps, the e-statePro team will compile the dataset that will be used on installation of your system. This will incorporate the data from the completed template, the stock categorisation, the reporting hierarchies, the costs lives and repairs, the 'Decent Homes' rules and the energy assessment rules that will satisfy the agreed reporting parameters.

During this phase we will report on any obvious anomalies, for example: duplicate records, misused data fields etc, but cannot ensure that all defects are eradicated.

We will use the data that you provide and must rely on its integrity and must trust that you have satisfied yourself as to its accuracy and suitability. Our consulting services can enable you to achieve continuous improvement in data, an area of work that many clients seek to involve us in.

#### ▶ Step 5 System Installation and Training

Installation of e-statePro software follows compilation of the dataset, making the full analysis functionality of the system available to you – adequate data permitting!

Within the standard implementation price we will provide training for up to six people to suit the user permission levels you consider appropriate for your organisation.

- A decision support system that provides financial forecasting and modelling.
- Fully auditable analysis and reporting processes.
- Ability to appraise varying scopes of work and to determine investment priorities.
- Ability to shift the emphasis from responsive repairs through improved data management
- Facility to review and re-assess investment priorities and to monitor progress against targets and organisational objectives.
- Compliance with the ODPM edict that requires landlords to implement "fully capable information and planning systems for asset management".

#### ▶ Step 6 User Acceptance, Baseline Analysis and Reporting

The software implementation will be completed when the system successfully meets the agreed programme and is then used to set and agree 'baseline' planned maintenance cost forecasts, 'Decent Homes' assessments and energy rating calculations, insofar as they can be completed using the available data. Performance monitoring and progress towards targets will be measured against these 'baseline' results.

The system can then be utilised to enhance and improve the dataset through ongoing targeted research and 'top-up' surveys.



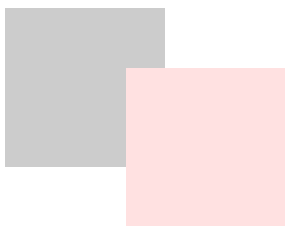
# Systems Integration and Interfaces

Asprey's experience of software development and systems integration is available to all e-statePro customers.

e-statePro is fully integrated with Comino's Universal Housing system through our partnering arrangement.

We have worked with our established client base interfacing with housing management software systems from 'Orchard', 'Academy', 'Sx3' and others. This experience renders e-statePro the leader in the field.

The specialist skills of the team allow us to readily identify systems integration issues, consider data integrity matters and develop links between e-statePro and existing installed systems, facilitating the exchange of valuable key data and the systematic maintenance of asset information.

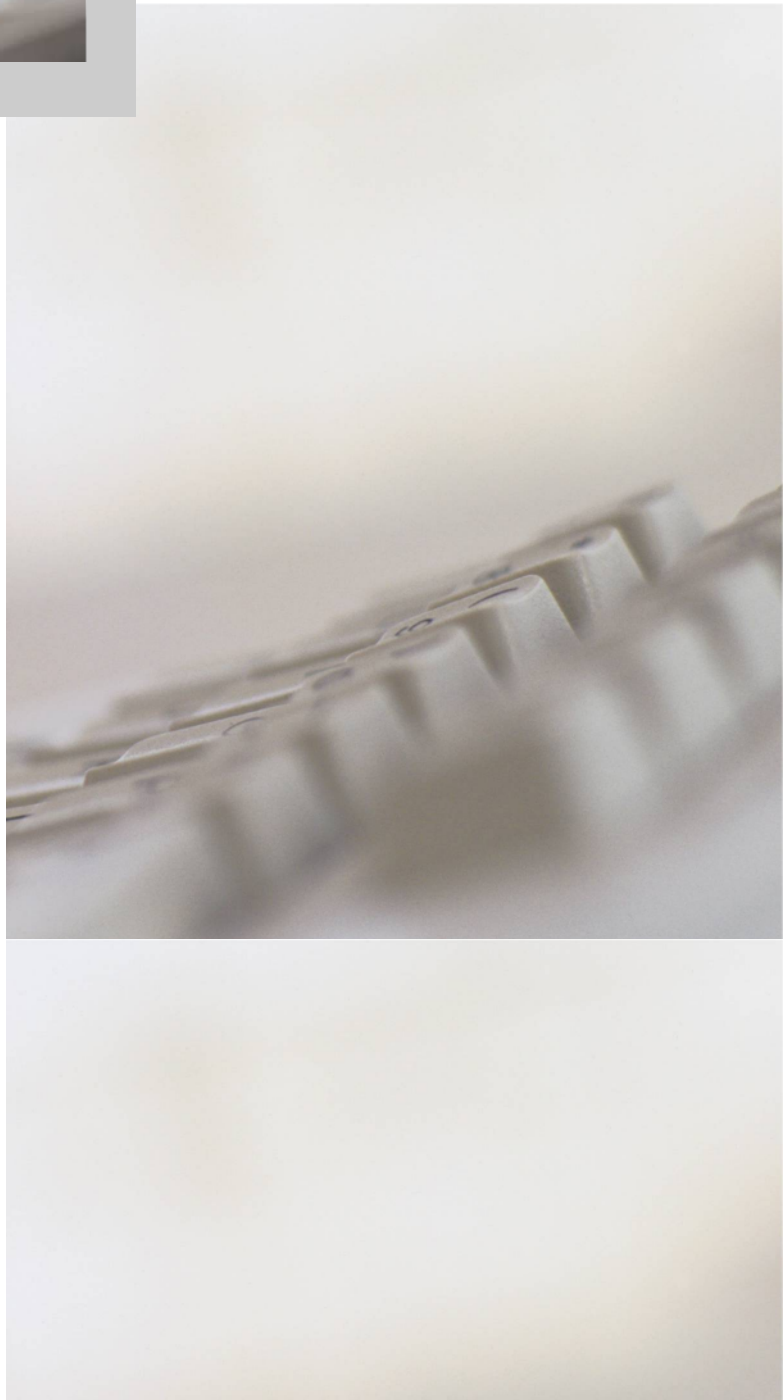


## A Range of Consulting Solutions



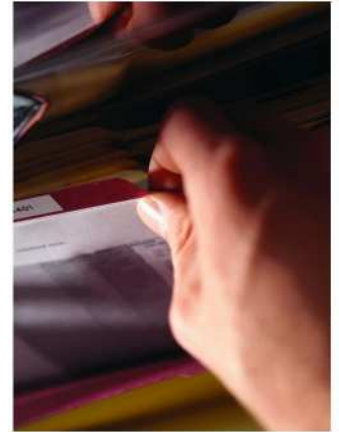
In addition to the e-statePro and ProSurvey software installation and implementation work, Asprey offers a range of supporting consultancy services to assist the process.

These services relate not only to the software, but also to the ongoing data collection and maintenance requirements that will ensure the relevance and accuracy of reports used for planning, monitoring and decision support.



## *Decent Homes Guidance*

Asprey's e-statePro team has gained considerable experience in the interpretation and application of 'Decent Homes' guidance. Our consultants are available to share their knowledge and the experience acquired on previous projects as a means of providing a benchmark for clients. You can legitimately adopt individual nuances of interpretation, within the terms of the guidance, to deliver results that meet particular organisational, operational and political circumstances.



We can provide assistance with the allocation of attribute and condition data against criteria in the standard, whether or not the data is available now or is to be collected later. Asprey consultants can help you to compile 'Decent Homes' rules using the 'Rules Manager' function to reflect the methodology you have adopted.

## *Scenario Planning*



In addition to the baseline forecasts and assessments to be established on completion of the software installation, we can support you in the building of scenarios with which to compare differing investment options.

Although this functionality is available in the standard system, and uses the familiar wizard interface, lessons have been learned through our previous work with existing clients. If – like many – you have an urgent need to demonstrate the likely effects of varying the components or the lives or the costs, then we would be pleased to provide you with the benefit of our experience to date.

Indeed, much of our own work with the e-statePro system involves modelling options on behalf of our clients. Typically, we have carried out 'impact analysis' exercises to model the effects of applying a variety of potential works package options to the raw data. This allows considerable flexibility in assessing the relationships between available funding and the results that can be achieved, crucial to the optimal use of scarce resources.

Using the impact analysis results as a guide we can provide assistance in devising programmes of work that will translate the modelled information into real results. We have already worked with a number of our clients' consultants and designers to help define cost effective packages of work and to capture additional attribute and condition data through their pre-specification property inspections.

### *Non Standard Reporting*



The e-statePro software is designed for the purposes of producing planned maintenance cost forecasts, Decent Homes assessments and energy rating calculations. Should you have wider requirements for additional outputs, then we can offer bespoke report design services to meet these requirements. You will no doubt appreciate that non-standard reports will be the subject of separate proposals and fee agreements, which are normally assessed on a time and materials basis.

### *Data Management*

We appreciate that there are many competing pressures on your time and resources. One option that you may wish to consider is the Asprey e-statePro data management service.

Our team of experienced data analysts are available to help maintain the e-statePro asset databases on an ongoing basis by taking and applying update information and then reporting the effects of these changes against planned performance targets. These types of data include: right-to-buy completions; transfers; demolitions; completed works information; survey and inspection data or relevant responsive repair details. Importantly, the system keeps a history – an auditable trail – of changes made for future reference and reporting.



We can assist with the population of relevant sections of the statistical and regulatory returns and we can also provide support meetings with both internal and external inspectors.

### *Building Programmes of Work*

Asprey's e-statePro consultancy has already assisted clients in:



- establishing 'Decent Homes' baseline positions
- measuring the impact of a variety of potential works programmes on improvement targets
- and, determining optimum programmes of work, within available budgets.

Similar advice and assistance can be provided in connection with the application of data and the establishment of rules for energy assessment and the calculation of SAP and NHER ratings and of CO<sub>2</sub> emissions levels.

## Asset Management and Strategy



Our experience levels and spread of functional expertise allow us to offer a variety of asset management and strategy 'products'. However, we are problem solvers in a fast moving environment where demands and best practice evolve rapidly. For this reason, we avoid compartmentalising and packaging our services to ensure that our advisory services evolve in parallel with your needs.

We can assist with any asset management or strategy need, and take a professional approach to offering such services by identifying, with you, the required and achievable deliverables at the outset.



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