



Compliance governance and avoiding downgrades and breach: A joined up approach

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People First Solutions



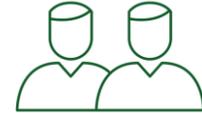
Property

Housing Management, Asset Management, Digital Self Service, Mobile, Repairs, Financials



Data and Analytics

Analytical products and services, Data Insight, Business Intelligence



Services

Managed Service and hosting, training, optimisation, business transformation

Today's Discussion

- Introduction
- Why do people buy specialist stand alone compliance systems?
- What's the problem with them?
- What's the alternative and why is that better?



Who we are



Orchard has been delivering People First Solutions as an independent provider to the UK for **over 40 years**



Crown
Commercial
Service
Supplier



Our people

Headquartered in
Newcastle upon Tyne



200 Colleagues

157 office
based

43 home
based

Our solutions - at a glance



Orchard Asset

The software solution of choice for housing asset management & IT professionals.

A comprehensive asset management solution, transforming the way housing associations & local authorities manage their stock.

A sophisticated management tool with the ability to make informed appraisals & decisions about individual properties or strategic issues affecting estates or entire stock portfolios.



**Managing
800,000+**
properties across the
UK



Why are
specialist
compliance
systems used?



Why do people buy specialist compliance systems?

- Good levels of analysis, reports and dashboards
- Follow up actions can often be managed
- Automatic reading and processing of certificates
- Managers persuaded by specialist staff who have seen exciting demos



What's the
problem then?

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What's the Problem?

- Systems tend to be confined to specific compliance areas so customers end up with multiple installations
- No standard integration - hours spent reconciling
- Reporting - no central source of data, time spent collating
- No single source of the truth
- No oversight - data and follow up actions inconsistently managed in separate systems with no central integration and only accessible to a few people

What's the Problem?

- No ability to set up, share or use best practice processes
 - Lack of visibility of key data both management and property level
 - Inconsistency of reporting - No central source for board reporting
 - Reliability - data consistency and quality
 - Usually manually maintained - little or no automation
 - Gaps filled by spreadsheets - Often systems record the results of inspections or services without managing the process
 - No management of the access process for dwelling servicing and inspections
-

Stand Alone Systems

Overall result - RISK





What's the
solution?

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Solution: Use your Asset Management system

- Housing Management system integration goes without saying
- Should include automated integration of completed works from the repairs system (e.g boiler servicing out of sequence for a void)
- Resident information included so it can manage the access process
- Focussed on managing due dates, not just on the results of completed services/inspections.

Solution: Use your Asset Management system

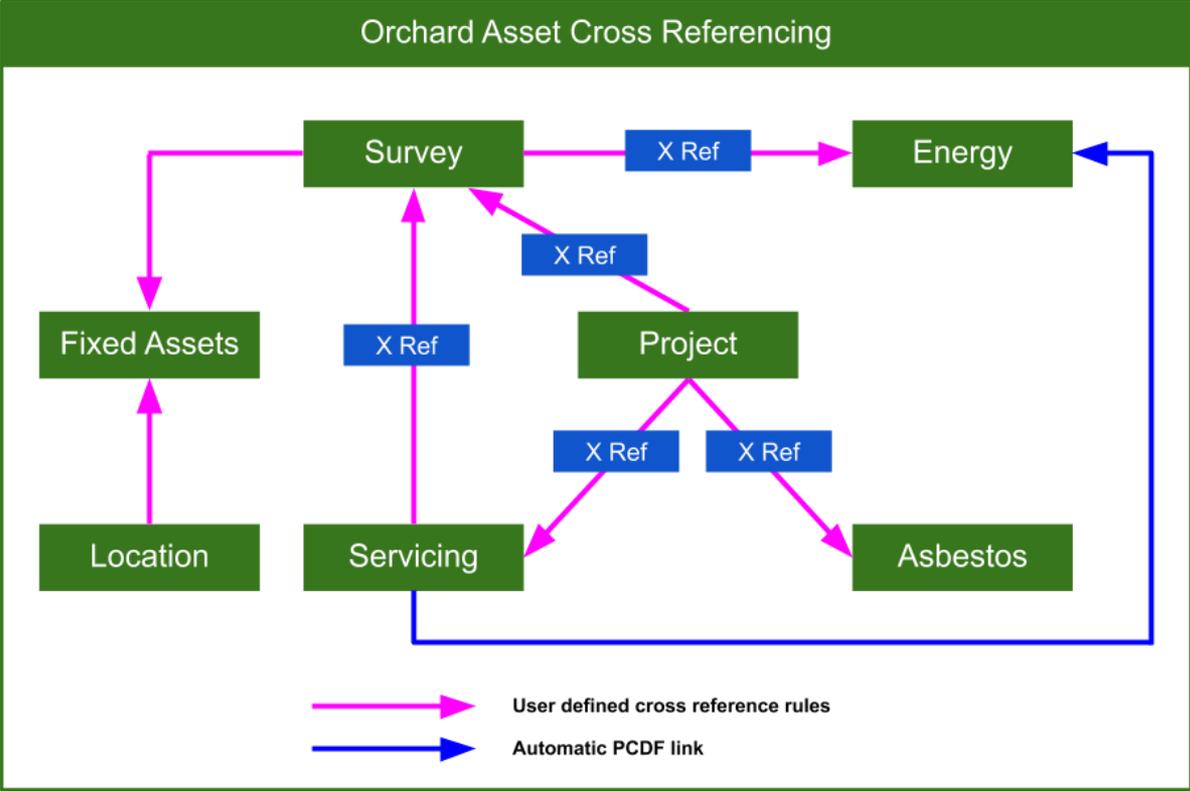
Asset systems can deliver compliance through automatic generation of individual jobs to the repairs systems and subsequent synchronisation of:

- Appointments
- Events such as no access
- Variations
- Cancellations
- Completions

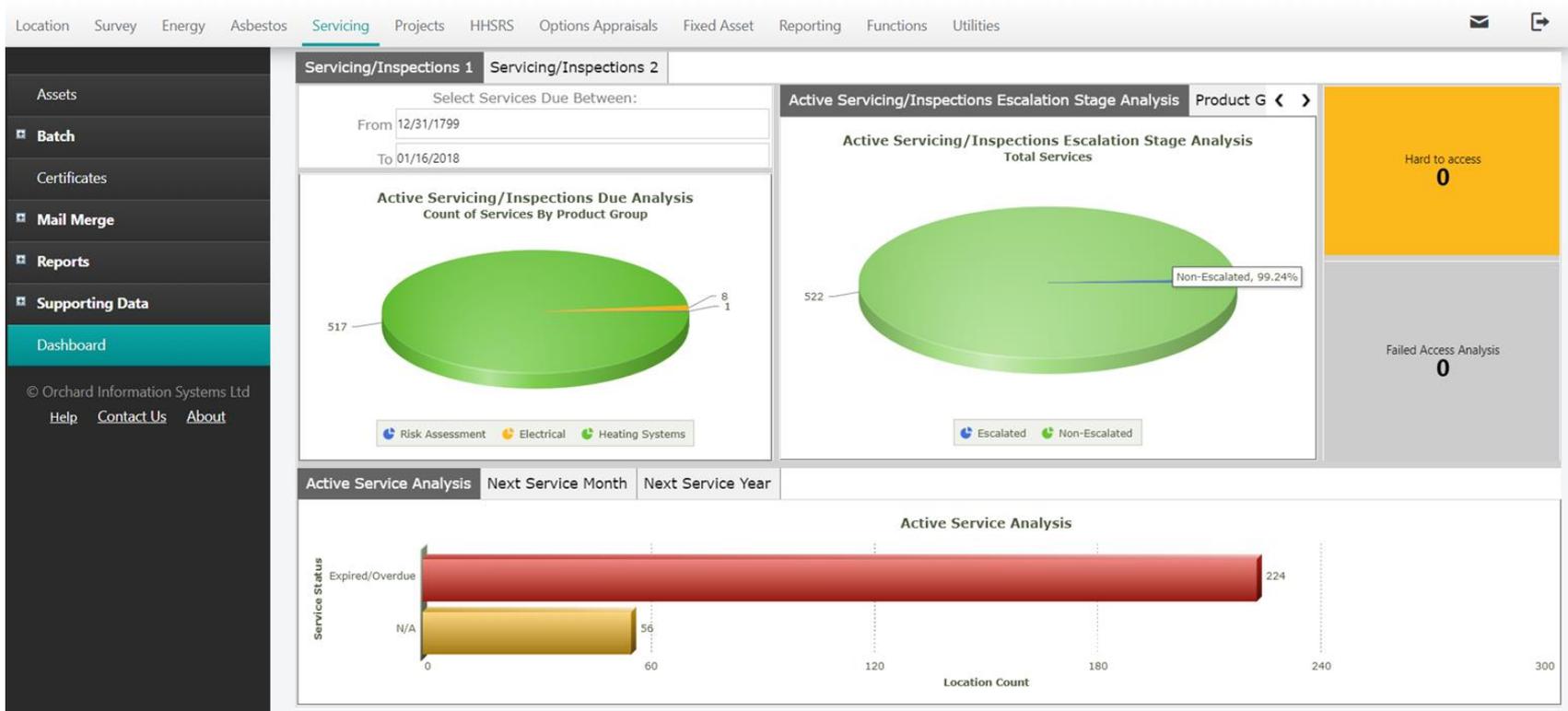
Solution: Use your Asset Management system

- Links with automatic updates across Asset modules to component and energy records
- PCDF for heating systems
- Consistent reporting and dashboards
- Follow up actions can be managed consistently
- Consistent processes across compliance areas
- A single source of the truth, visible throughout the organisation

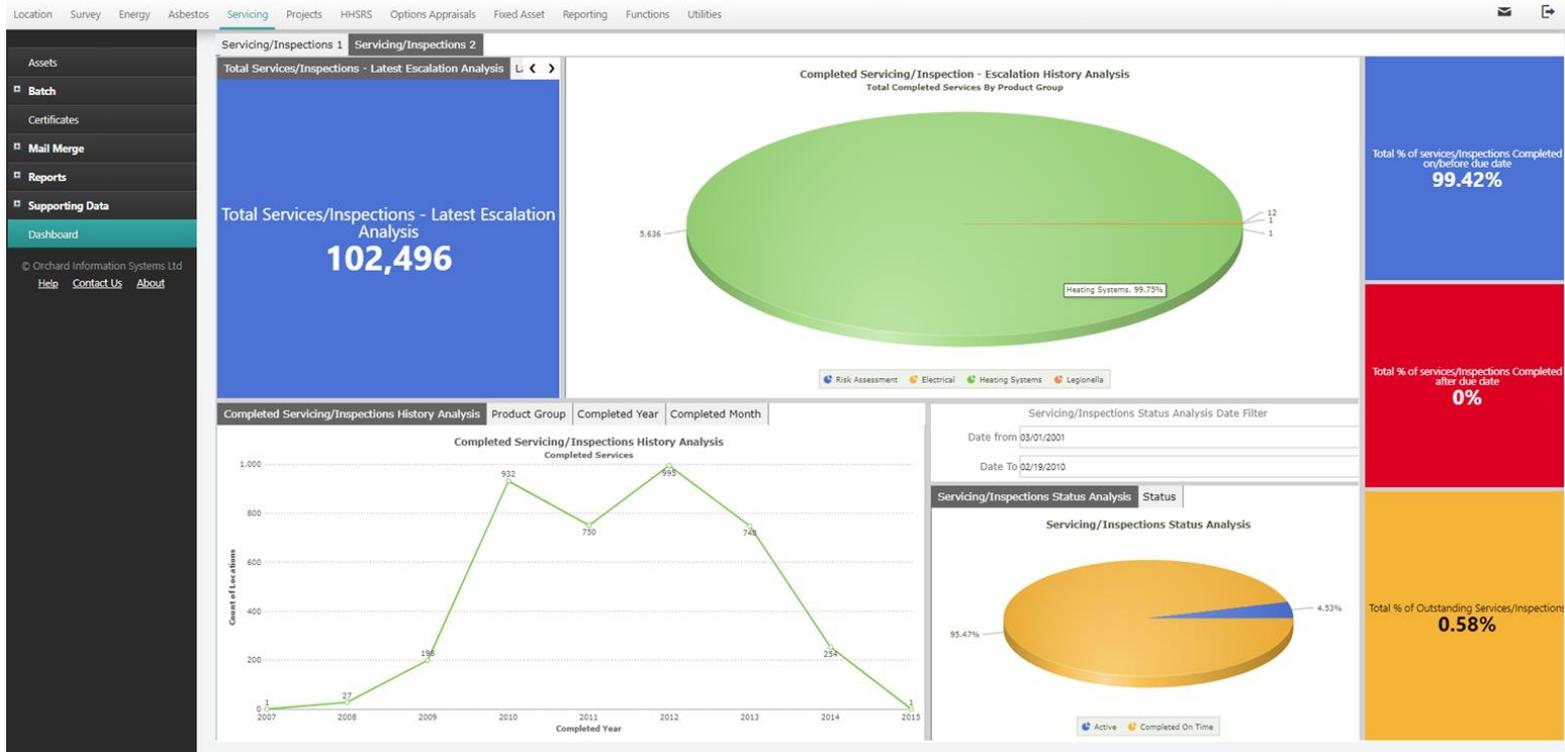
Modular Cross References



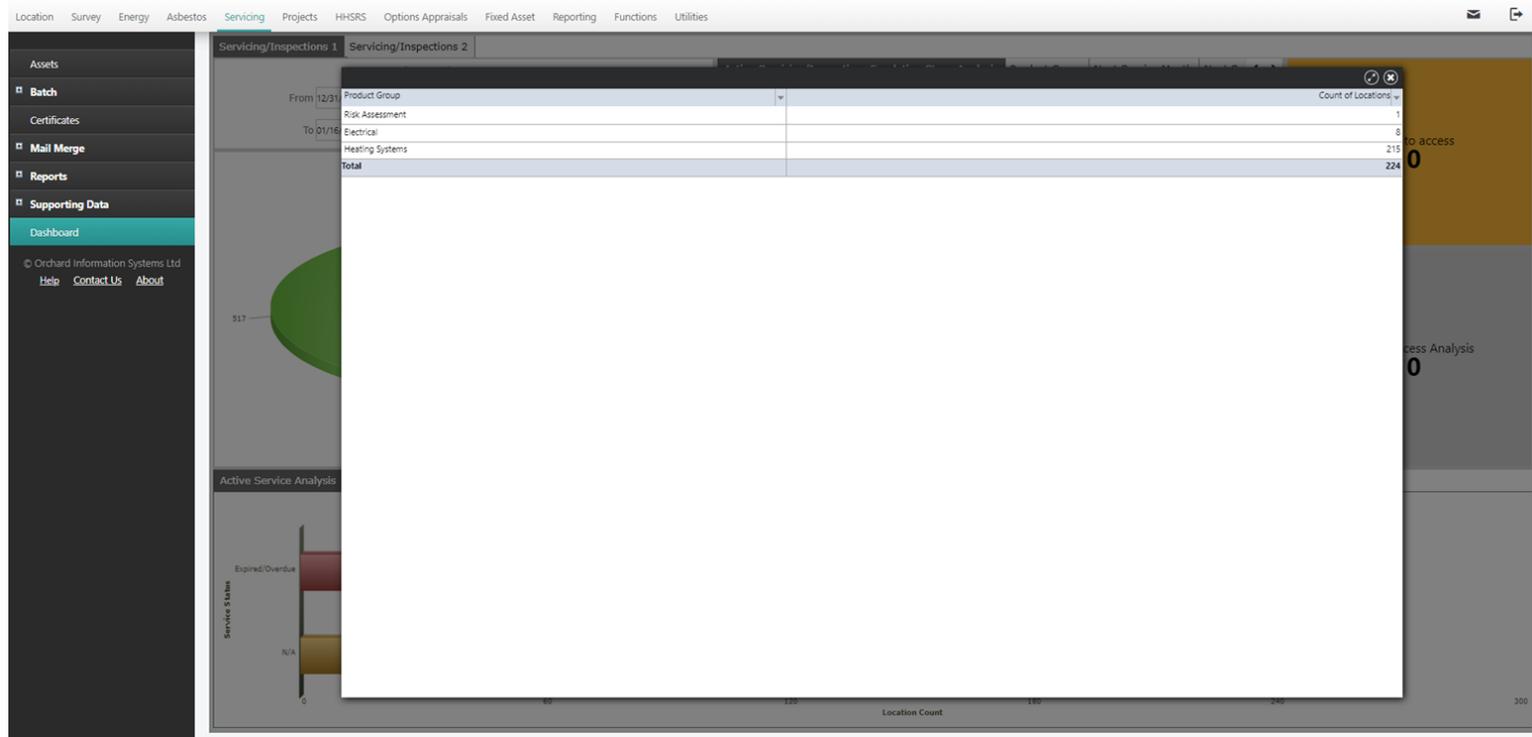
Dashboards - Overall Compliance (1)



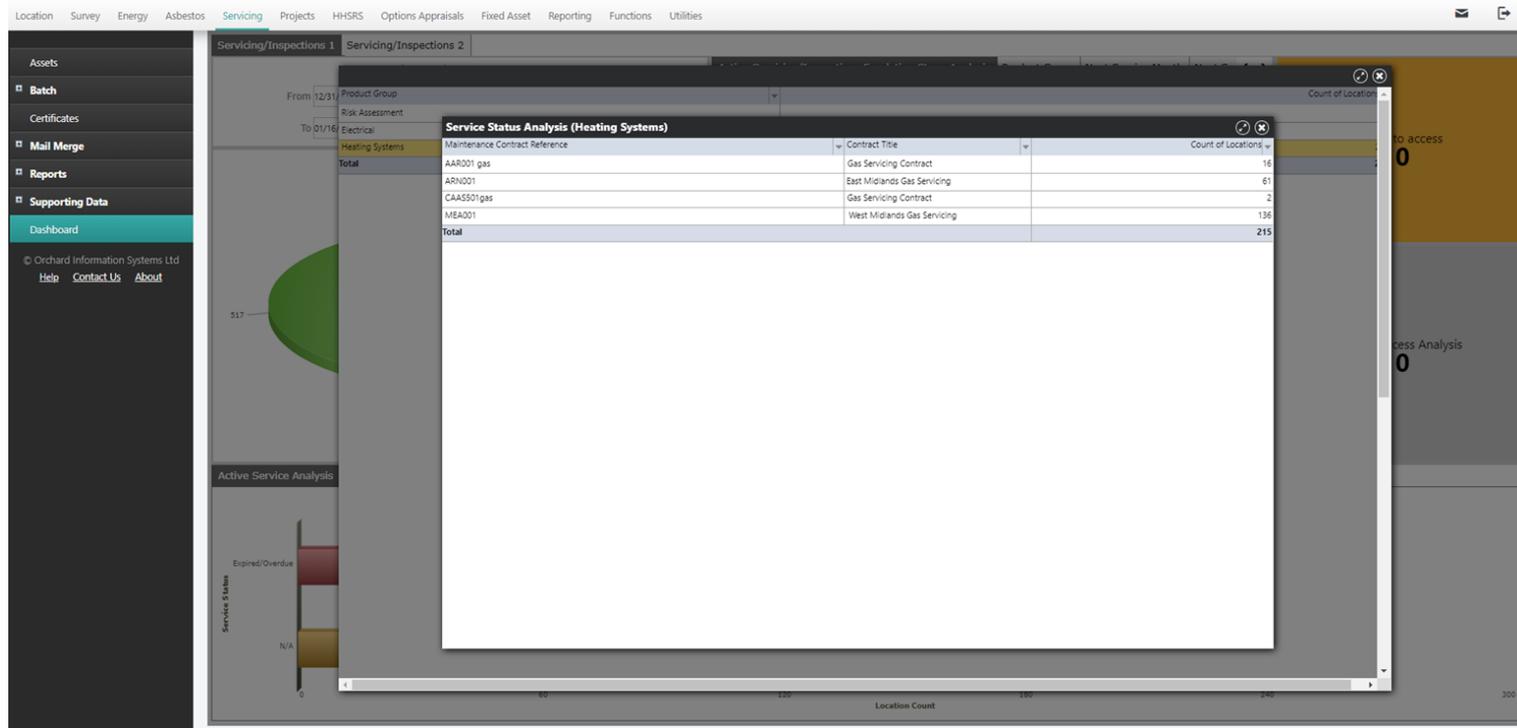
Dashboards - Overall Compliance (2)



Dashboards - Overdue - Drill Down to Compliance Area



Dashboards - Overdue - Drill Down to Contract



Dashboards - Overdue - Drill Down to Properties

The screenshot displays a software interface with a top navigation bar containing: Location, Survey, Energy, Asbestos, Servicing, Projects, HHSRS, Options Appraisals, Fixed Asset, Reporting, Functions, Utilities. A left sidebar menu includes: Assets, Batch, Certificates, Mail Merge, Reports, Supporting Data, and Dashboard (highlighted). Below the sidebar is the Orchard Information Systems Ltd logo and links for Help, Contact Us, and About.

The main content area features a 'Service Status Analysis (Heating Systems)' window. It includes a table with columns: Location Reference, Address 1, Address 2, Address 3, Address 4, PostCode, Location Type Code, and Location-Description. A context menu is open over the table, listing options: Export to Excel, Export to PDF, Export to CSV, Export to RTF, Allow grouping, Allow summary, and Fit column widths to window.

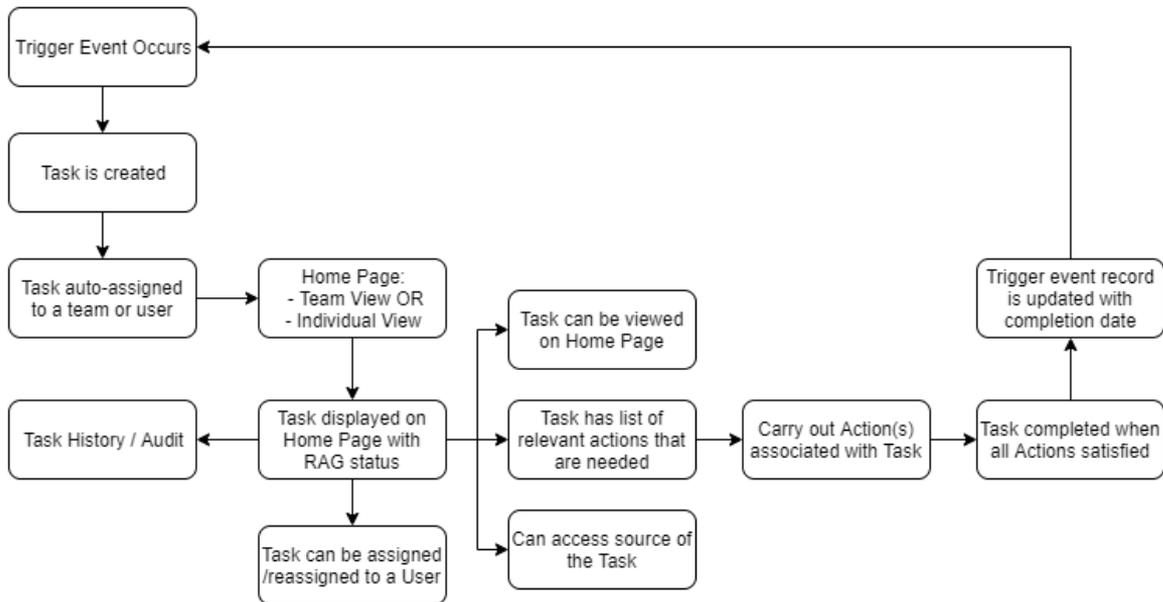
Location Reference	Address 1	Address 2	Address 3	Address 4	PostCode	Location Type Code	Location-Description
10018001	58 Sincil Bank	Lincoln			LN5 7TH	1	
10025001	Room 1	9 Windsor Terrace	Boston		PE21 6TB	1	
10042004	57 Epsom Close	Birchwood	Lincoln		LN8 0FH	1	
10050014	6 Ryecroft	Brant Road	Lincoln		LN5 9UL	1	
10052004	4 Bridge Court	Evejyn Street	Beeston	Nottingham	NG9 2DQ	1	
10052014	15 Bridge Court	Evejyn Street	Beeston	Nottingham	NG9 2DQ	1	
10096087	88 Edgemere				DN15 7ET	1	
10257007	14 Sands Close				NG4 2GZ	1	
10615004	12 Egret Grove				LN6 0JL	1	
10682006	7 Sherbrooke Street				LN2 5QA	1	
10761002	4 St Augustine Road				LN2 4FH	1	
10763008	32 Sharp Walk				LN8 9TP	1	
10772001	46 Thomas Middlecott Drive				PE20 1HU	1	
10786003	33 Dealine Close				PE10 9LP	1	
10786006	27 Dealine Close	Spalding Road	Bourne	Lincs	PE10 9LP	1	
10883001	7 South View Road	Peterborough			PE4 6AG	1	
Total							

Below the table is a 'Service Status' bar chart showing 'Expired/Overdue' and 'N/A' categories. The x-axis is labeled 'Location Count' with values 0, 60, 120, 180, 240, 300.

Task & Alert Management Flow Diagram

**ACTION TYPES
(System Supplied)**
Examples:
- Raise Repair
- Send Letter
- Send Email

**TASK TYPES
(System Supplied)**
- Trigger Event
- Default Actions
- RAG / Urgency
- Timescale / Days



User Dashboard

Not secure | in4-test01:82/Pages/Utilities/Admin/EditUser.aspx

Location Survey Energy Asbestos Servicing Projects HHSRS Options Appraisals Fixed Asset Reporting Functions Utilities

Welcome back **JOHN SMITH**

Below is an overview of all tasks for you...

Display: Last 4 weeks View Alerts 16

Last updated: Today, 12:05

Tasks	Tasks	Tasks
46 Outstanding	8 In Progress	7 Waiting Allocation

My Tasks All Tasks

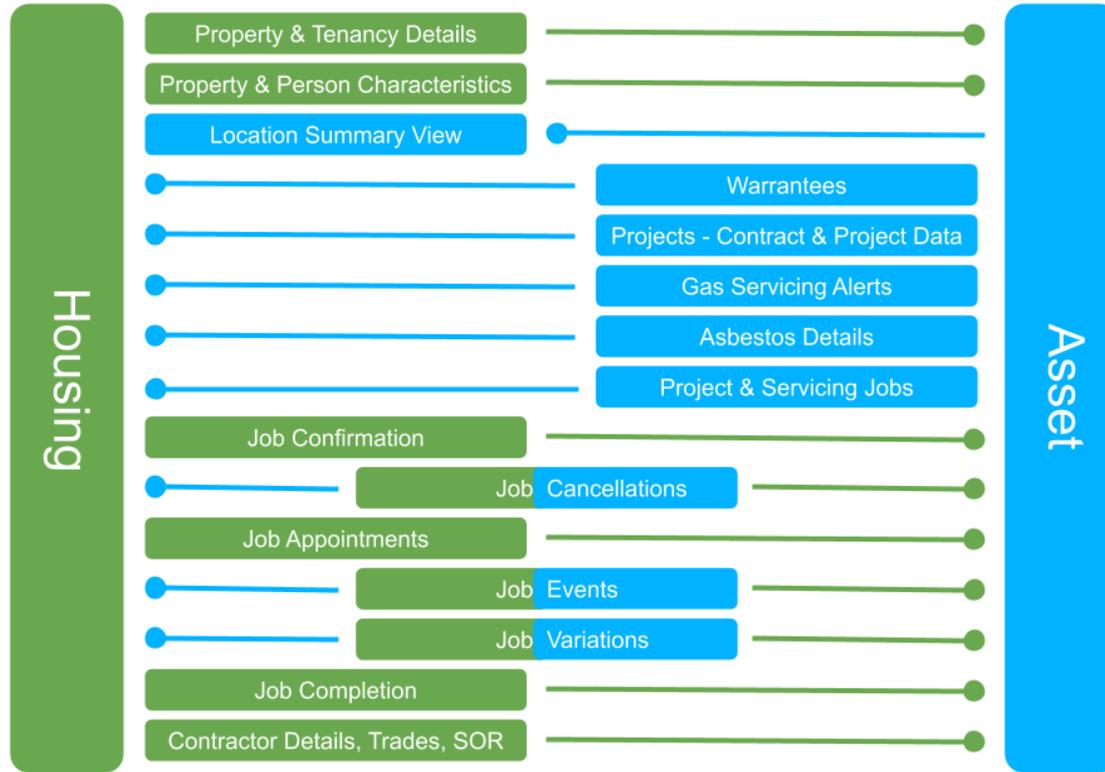
Task Type: All Status: All

- Follow up actions from Risk Assessments
Flat 9 Azalea Crescent, Sunderland, SR4 8PP
Assigned to: Mark Davis
Overdue Survey
- Follow up actions from Risk Assessments
Flat 9 Azalea Crescent, Sunderland, SR4 8PP
Assigned to: Mark Davis
Due in 30 days Survey
- Follow up actions from Risk Assessments
Flat 9 Azalea Crescent, Sunderland, SR4 8PP
Assigned to: Mark Davis
Due in 7 days Asbestos
- Follow up actions from Risk Assessments
Flat 9 Azalea Crescent, Sunderland, SR4 8PP
Assigned to: Mark Davis
Due Servicing
- Follow up actions from Risk Assessments
Flat 9 Azalea Crescent, Sunderland, SR4 8PP
Assigned to: Mark Davis
Due in 30 days Project

Load More

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Seamless with Housing



Compliance : Achieving the Asset Director's Wish List

- Achieving servicing and inspection due dates driven by fixed intervals (as adjusted by MOT style servicing) or risk (e.g. Asbestos)
- Consistent processes across compliance areas
- Evidenced by dashboards and reports
- Clear audit trail and workflow for follow up actions with management oversight
- Visibility of information to all housing and asset staff
- One version of the truth, minimum number of systems required
- Confidence in systems and reporting at Exec and Board level

Using an integrated Asset Management system

Overall result - HAPPINESS



Thank you!

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