

NORTH VIEW Housing Association

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North View is a registered Scottish charity – charity registration number SC032963

STRATEGY

PERFORMANCE MANAGEMENT STRATEGY

Passed:-	24/07/2024	Review Date:-	June 2027
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All North View policies and publications can be made available on CD/data-to-voice, in Braille, large print and community languages.

For further details please contact us on 0141 634 0555 or email us on enquiries@nvha.org.uk

1.0 Introduction

- 1.1 The Management Committee of North View Housing Association has overall responsibility for the work of the Association.

Much of the type and range of work that the Association does is defined in Acts of Parliament. It is the role of the Management Committee to ensure that the Association meets its statutory obligations. In the majority of instances, Committee has autonomy to determine the processes through which the Association will meet these obligations.

Committee also has scope to develop operational processes to benefit the Association's tenants, residents and service users.

The Association believes that a managed approach to all operational activities will strengthen its ability to improve its performance in these areas.

- 1.2 The Association recognises that certain operational activities affect its wellbeing and/or its ability to provide high quality services to tenants, residents, and service users, more than others; *these are the key operational activities*. The Performance Management Strategy has been developed to help enable the Association to monitor and strengthen its performance in these key areas.

- 1.3 The Strategy is wide ranging, covering all aspects of the Association's work to varying degrees. It also covers the arrangements that we have in place to support effective performance management.

It is designed to be 'dynamic', in that it is relevant to current demands, and responsive to changing demand.

- 1.4 It has been developed to meet the requirements of North View Housing Association and is founded upon the ideals of continual improvement, best value, and proportionality.



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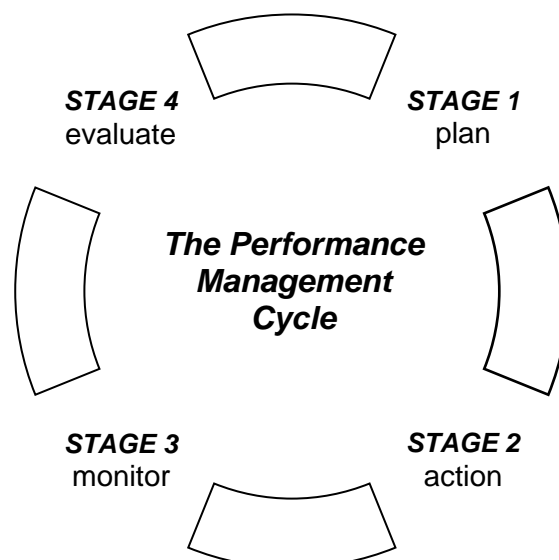
- 1.5 The Strategy forms a 'performance framework'. On implementation, it becomes a management tool to help the Association monitor, evaluate, and improve its performance in key areas.

2.0 Aims

- 2.1 The overarching aim of the Strategy is to establish a framework of (performance related) activities that facilitates the provision of a high quality service to tenants, residents and service users.
- 2.2 Secondary aims include:-
- Establishing robust processes to support the management and continual improvement of operational activities.
 - Improving the efficiency of the delivery process and effectiveness of the delivered product.

3.0 The Performance Management Cycle

- 3.1 The Performance Management Strategy is based on an activity cycle underpinned by the principles of plan, act, monitor, and evaluate.
- 3.2 Planning is the first stage in the cycle; implementing the plans (action) is the second. The next activity is to monitor the actions; and the last stage is to evaluate what was done.
- 3.3 The continuous Performance Management Cycle is illustrated below:-



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3.4 The outcome of the Evaluation Stage shall be used to inform the Planning Stage for the next phase of activities.

3.5 Each stage of the Performance Management Cycle is discussed below.

Stage 1 – Plan

3.6 Planning is the first stage in the process. At this point, the Association will:-

- Identify the key activities against which it wishes to monitor performance.
- Prioritise the 'importance' of activities (taking into account issues like statutory and contractual obligations, guidance, and potential effect on the well being of the Association).
- Select key activities to set performance targets for.
- Establish measurement criteria for each of these activities.
- Establish reporting arrangements for each activity (including frequency of report, type of report, and receiving person/group/Committee etc.). The reporting format shall be proportionate to the importance of the report subject.

3.7 All targets shall be SMART (specific, measurable, appropriate, relevant, and timebound).

Stage 2 – Act

3.8 At Stage 2, the Association will:-

- Put in place indicators and targets against which performance can be measured.
- Carry out activities.

Stage 3 – Monitor

3.9 At this Stage, the Association shall collect, and correlate the requisite outcome information.

Stage 4 – Evaluate

3.10 The information correlated at the Monitoring stage shall be analysed, and assessed. Future action will be determined (by Committee) upon the consideration (of the analysis and assessment), with the outcome informing the next Planning stage.

4.0 Performance Management Processes

4.1 North View uses a raft of varying methods to manage performance.



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In the remainder of this Strategy, we discuss how performance management affects the following topics:- Objectives, Targets, Service Standards, Audit, Benchmarking, Policies, Service User Input, Staff Performance Management, Financial Management, and Workprogramme.

5.0 Objectives

- 5.1 We use Strategic Objectives to set our 'direction' and Operational Objectives to help 'manage the journey'.
- 5.2 Our Strategic Objectives are contained within our Business Plan. They are reviewed at least every three years and monitored regularly (at least annually).
- 5.3 We set annual Operational Objectives to complement our Strategic Objectives.
- 5.4 Our Operational Objectives are SMART (specific, measurable, appropriate, relevant, and timebound). We measure progress and report to Committee at least quarterly.

6.0 Targets

- 6.1 We use two monitoring models to in Performance Management:- i) Key Performance Targets, and iii) Key Performance Indicators.

Key Performance Targets

- 6.2 Our Key Performance Targets (KPTs) cover topics that relate to the most essential operational aspects of our business i.e. housing management, maintenance and finance.

KPTs set a standard to be aimed for; monitoring them helps us identify areas of under performance, whereupon we are able to implement appropriate actions to address failings.

Our KPTs relate to 'end results'; they do not cover performance during the procedure leading up to the 'end result'.

- 6.3 The Association records and measures its performance against KPTs; these are reported to Management Committee usually on a quarterly basis.

Key Performance Indicators



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- 6.4 Key Performance Indicators (KPIs) are used to gauge performance in selected areas. KPIs and KPTs are similar in that they both relate to the monitoring of performance in certain areas, but KPTs go further in that, for these, we measure performance against a set target.

An example of a KPT is *'That at least 95% of Urgent Repairs be completed within 3 working days of being reported'* ('at least 95%' being the target). An example of a KPI is the numerical reports on cases of anti-social behaviour (which does not have a target).

Comparison

- 6.5 Recording our KPTs and KPIs allows us to compare our current performance against past performance, and against the performance of other Registered Social Landlords (RSL).

Comparison against our past performance helps us identify trends, which we can use to inform our actions, while comparison with the performance of other RSLs allows us to benchmark our performance against that of our peers.

7.0 Service Standards

- 7.1 These set out the standard of service that the Association aims to provide to its tenants, residents, and service users.

Service Standards are closely related to KPTs.

- 7.2 Service Standards are aspirational entities which are difficult to achieve on every occasion. KPTs are more realistic, and define the minimum standard acceptable to the Association (for example, one of the Association's Service Standards is to make safe emergency repairs within three hours and make safe within 24 hours, whereas the KPT is that at least 96% of emergency repairs be completed within this timescale. The KPT recognises the fact that it is nigh impossible for each and every repair to be carried out within the target timescale set in the Service Standard.

8.0 Audit

- 8.1 Audit is the process through which checks to test that the Association's policies and procedures are being adhered to are carried out.

- 8.2 We have two types of audit:- the External Audit, and the Internal Audit.



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External Audit

- 8.3 North View is statutorily obliged to carry out an independent External Audit each year.
- 8.4 The External Audit covers the Association's accounts, financial transactions and financial probity.
- 8.5 At the end of the audit process, the External Auditor delivers a statement detailing their findings.

Internal Audit

- 8.6 The Internal Audit provides a means of 'quality testing' key areas of the Association's business to help determine compliance with legislation, policy, guidance, good practice etc..
- 8.7 The Association appoints a competent company to carry out its Internal Audit function.

The Audit cycle is generally planned over a three year period. Audit subjects are agreed between the Association and Internal Auditor and are scheduled depending upon their, relevance, and level of risk.

- 8.8 The programme of Internal Audit covers the whole of the Association's control system at a general level, but the Internal Auditor sets the format and scope of compliance testing.
- 8.9 North View sets the programme of Internal Audit for each year. After each audit visit, the Internal Auditor will prepare a report for Management Committee. The report will contain an assessment of their findings, and their recommendations. It is for Committee to consider the content and respond.
- 8.10 The Association regularly reviews past Response Reports to assess the level to which response actions have been implemented.
- 8.11 The Internal Auditor will submit an annual Internal Audit Report to Committee which summarises the Internal Audit work carried out in that (financial) year.

9.0 Benchmarking



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- 9.1 North View uses Benchmarking to compare its performance in key operational areas against that of peer RSLs (this include topics covered by KPTs, Procedural Targets, and KPIs). Benchmarking gives wider context to the Association's performance in these key areas.
- 9.2 A Performance Comparison Report is presented to Committee at least once per year, with additional reports being prepared as necessary.

10.0 Policies

- 10.1 The Association will establish and maintain a comprehensive set of policies that are responsive to our activities.
- 10.2 Most policies are reviewed every five years, but some are reviewed at three year intervals.
- 10.3 Policies will be reviewed earlier than the scheduled review dates if there have been changes in legislation affecting that policy. Policies may also be reviewed to take cognisance of 'best practice' updates.
- 10.4 New policies are introduced to meet emerging requirements, and existing policies are reviewed/amended/deleted as required in response to such changes.
- 10.5 The Association sets an annual Policy Review Schedule to cover the following twelve months. This is then incorporated into the Workprogramme (refer to item 14.0).

11.0 Service User Input

- 11.1 User input to performance related activities primarily takes the form of scrutiny, which is delivered in the manner set out in our Resident Involvement Strategy.

12.0 Staff Performance Management

- 12.1 North View recognises that its ability to deliver an efficient and effective service is fundamentally dependant upon the ability, skills and knowledge of the body of Staff employed by the Association.
- 12.2 The Association has established processes that promote Staff development and Objective/Target attainment through dissemination of responsibility to individual members of Staff.



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- 12.3 The process is underpinned by good communication, and Staff are supported through Staff Meetings, Team Meetings, Personal Development Interviews, Personal Development Plans, and a Learning and Development Plan. Staff performance is managed through the implementation of these processes.

13.0 Financial Management

- 13.1 This is the single most significant entity affecting the overall wellbeing of North View.

We have policies and procedures in place to cover how we borrow and invest money, how we manage our money, what we spend it on, and how we safeguard our money against theft and fraud.

- 13.2 Our financial strength is affected by performance in operational areas (for example, void management, rent arrears, maintenance expenditure), all of which have a direct impact of the Association's finances. It is, therefore, very important that these operations are effectively managed.
- 13.3 The annual budget sets a control framework for these activities, and regular variance monitoring and reporting processes are implemented to assess their affect.
- 13.4 The annual budget is used as the base year for long-term term financial planning. This exercise helps enable early identification of problems and facilitates the timeous development of a response strategy.
- 13.5 The Management Committee shall set key performance targets (or indicators) for the finance function. The Management Committee shall receive outturn reports (against these tragets/indicators) at least quarterly.

14.0 Work Programme

- 14.1 The purpose of the Work Programme is to structure workload. It disciplines the Association activities and sets a yardstick against which progress can be measured.
- 14.2 The Association plans its work for the (financial) year ahead through the establishment of a Twelve Month Work Programme. This sets out activity and action timeframes, including scheduling of policy reviews. All of the performance management activities discussed above are covered in the Workprogramme.



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- 14.3 The Work Programme forms a strategic framework for the Association's activities over the following financial year and is complimented by more detailed plans/reports which are submitted to Management Committee periodically.
- 14.4 Progress against planned activities is regularly monitored by the Senior Staff team and reported to Committee.
- 14.5 The Twelve Month Work Programme is reviewed, usually at the mid-year point, and new areas of work included as required.

15.0 Reporting Formats

- 15.1 Progress against programme is reported at Committee Meetings.
- 15.2 Outcome performance shall normally be reported to Committee through 'Performance Pro-forma' reports, which are usually submitted quarterly.
- 15.3 These reports include performance information on Operational Objectives, and Key Performance Targets.
- 15.4 The reports include information pertaining to the past performance and current performance.
- 15.5 Committee shall set the content and structure of the 'Performance Pro-forma Reports'. However, Committee will monitor the effectiveness of the Reports and will amend format or subject matter if required.
- 15.6 Information about our performance, and a comparison of our performance against peer Registered Social Landlords (RSLs), and previous years will be included in our Annual Performance Report.

16.0 Review

- 16.1 This Strategy will be reviewed at least every three years.

End

Reviews and amendments

- 27th March 2007 - Strategy established
- 26th March 2008 - Strategy reviewed
- 27th April 2011 - Strategy reviewed
- 19th March 2014 - Strategy reviewed



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19th September 2018 - Strategy reviewed.
24th July 2024 - Strategy reviewed



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