

Capability Statement



Stock Condition Surveys



Our accreditations

ISO 9001
Quality management



ISO 14001
Environmental management



ISO 45001
Health and safety management



CHAS
Registered firm



RICS
Corporate member



Gas Safe
Registered firm



NAPIT
Approved contractor



Constructionline
Registered firm



EXOR
Compliance and procurement policies



ATAC
Asbestos testing and consultancy member



UKATA
Asbestos training



Elmhurst Energy Systems
Green deal approved



BAFE
Provision of Fire Risk Assessments



RISQS
Registered firm



Institute of Fire Engineers
Affiliate organisation



Fire Protection Association
Corporate member



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Mission, Vision and Values



We live our **Values** everyday at Pennington Choices Ltd; they serve as a compass for our actions and describe our behaviours.

Introduction



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Head of Survey Services

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“Pennington Choices has been a vital part of our service improvement and decent homes delivery plans. Without the quality and timeliness of the survey that they have undertaken, we would not be where we are today.”

Stephanie Clueit, Asset & Procurement Management, Salix Homes

We help a wide range of registered providers to assess the condition of their housing stock. Assessments have historically included: Decent Homes Standard (including the housing health and safety rating system) life cycle replacement costs and RdSAP.

Essentially, we help clients to populate their asset management database, interrogate the information and to report on any significant findings. This provides clients with a reliable data set capable of forming the basis of future asset management strategies and reinvestment strategies.

In England, we undertake a Decent Homes Standard assessment. In Scotland, we undertake a Scottish Housing Quality Standard assessment and in Wales, we undertake a Welsh Housing Quality Standard assessment.

Our service offering includes:

- Review of survey component configuration and survey design set-up.
- Reporting on Decent Homes Standard (DHS), Scottish Housing Quality Standard (SHQS) or Welsh Housing Quality Standard (WHQS).
- Housing Health and Safety Rating System (HHSRS) assessment of your housing stock.
- All levels of energy data collection as well as SAP score generation.

“Over the last couple of years, Pennington Choices has significantly supported St Vincent’s in the development of affordable housing in the northwest; we have successfully worked in partnership together to ensure our projects are built in line with our high quality standards whilst being delivered on time and within budget.”

Damien Mason,
Development
Manager, St
Vincent’s Housing
Association

- Pre-entry surveys providing advice and forecasting to enable you to plan for the future.
- Using asset management system, Keystone, to provide accurate asset management data.
- Importing survey data into a range of asset management systems; including, Keystone, Promaster, PIMSS, Lifespan, Codeman, etc.
- Forecasting and reporting workshop(s) to ensure that the report reflects your total maintenance spend and is realistic.
- Management consultancy, including; asset management strategy, scenario modelling, sustainability modelling and reinvestment planning.

Through our work with Housing Intelligence for the East Midlands (HI4EM), we worked closely with the Building Research Establishment (BRE) to improve the way we used statistical representation techniques to increase the accuracy of sample selection. This in turn improved the accuracy of outputs provided to our clients, for example, extrapolated 30 year cost calculations are much more realistic than previously realised.

We were the first organisation in the field to partner with the BRE in relation to sample selection techniques. Pennington Choices was also the first company to partner with Keystone, which is now the most widely used asset management software application in the social housing sector and our team are all expert Keystone Asset Management users.

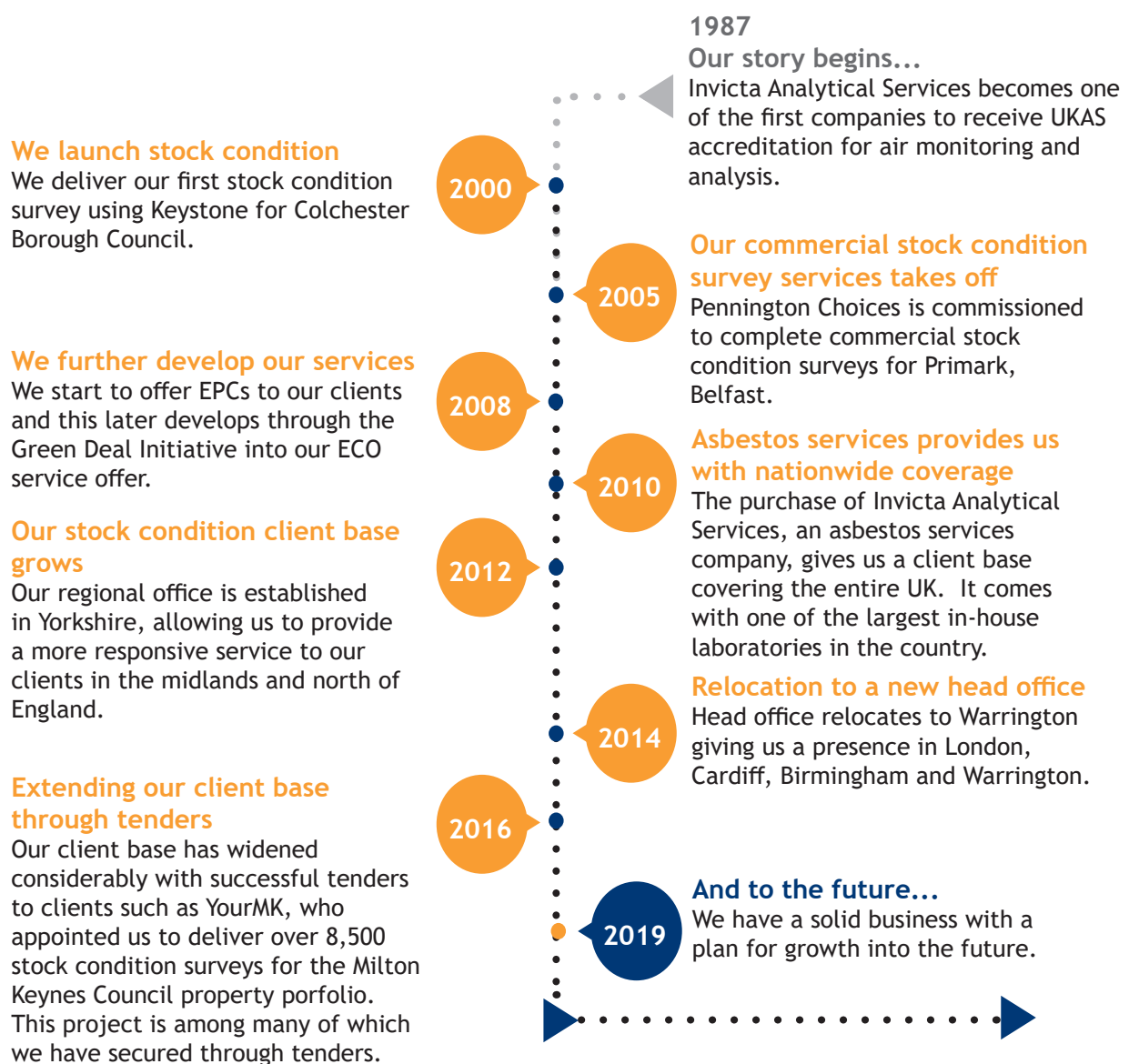


Matthew Corry
Head of Survey Services

Company Overview

We are a multi-disciplinary provider of consultancy and support services for public and private sector clients. Our clients include local authorities, social landlords of all types, the NHS, schools, businesses with significant corporate property concerns, building and maintenance contractors.

The company commenced trading in January 2000, becoming incorporated in March 2000 and has expanded its range of services considerably over that time. Details of our journey are illustrated below.



Some of our recent stock condition clients:



Plus Dane Housing



We operate on a UK wide basis, with staff based across the country and four office locations. Our head office is based in Warrington. We have regional offices in Glasgow, Cardiff and Birmingham.

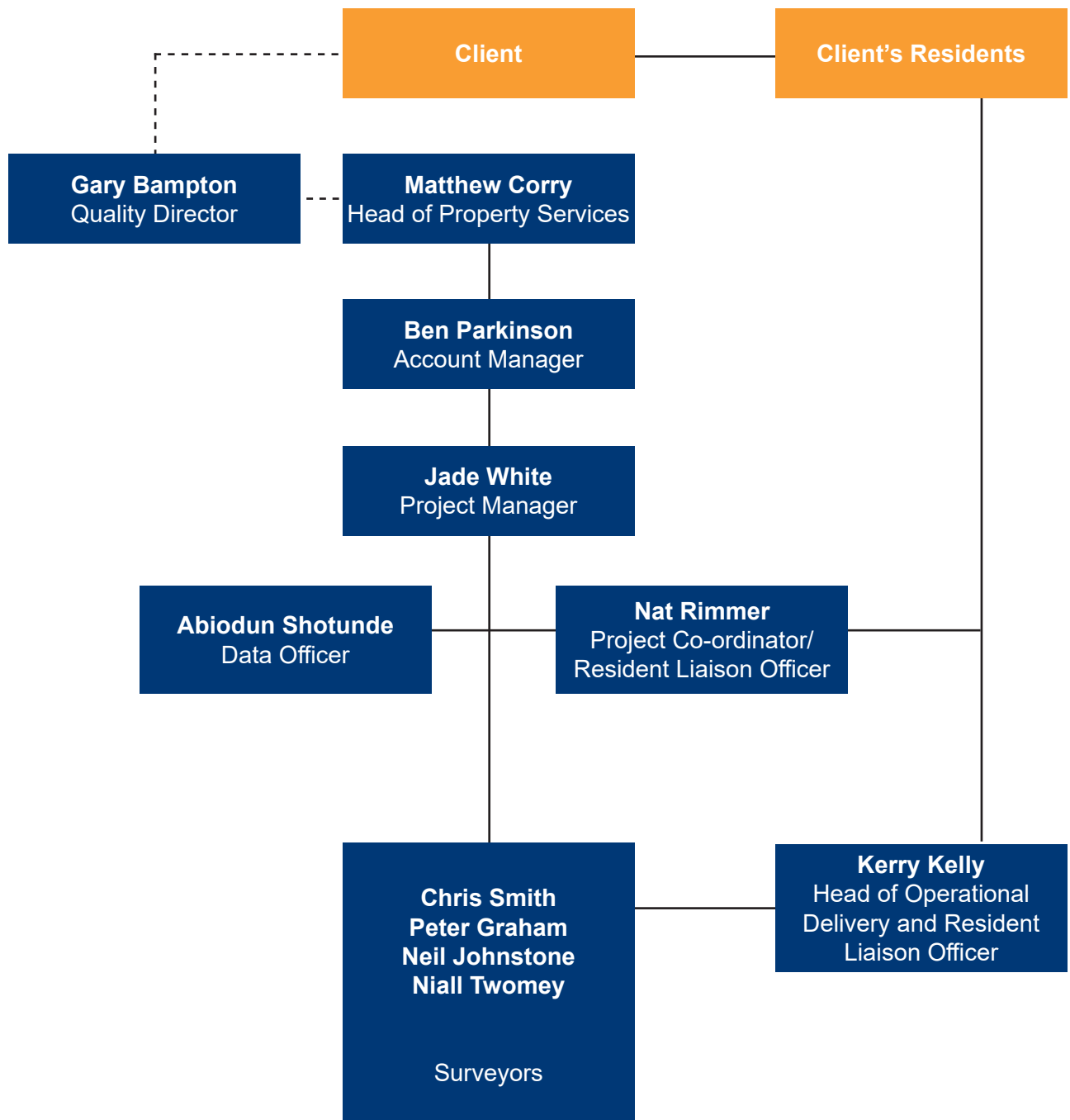
We provide a range of services to clients, which take the form of consultancy, provision of support services, interim management and training, as follows:

- Asset management & maintenance.
- Asbestos services.
- Building and quantity surveying.
- Electrical management services.
- Energy efficiency.
- Gas management services.
- Human resources.
- Professional training.
- Project management.
- Regeneration and development.
- Strategic social housing support.

We have provided stock condition surveys to a number of local authorities and housing for 16 years. Our recent clients include:

Our Team

The organisation structure below describes our typical resource for a stock condition commission. All members of our team are directly employed, permanent members of staff.



We have provided details of their expertise below and CVs are included for our team at the end of this section.

Gary Bampton **Quality Director**

Member of Royal Institute of Chartered Surveyors (MRICS); BTEC Building Studies; HND Building Studies; BSc (Hons) Building Surveying; PGDip Surv - Postgraduate Diploma in Building Surveying.

Gary Bampton will be the accountable director. Gary is our commercial director and also a chartered building surveyor. Gary is an asset management specialist and has a wealth of experience in relation to electronic data capture, Decent Homes, HHSRS, SAP and asset management software applications (Keystone, Codeman, Promaster, PIMSS and Aareon). He will be responsible for successful project delivery. He will ensure this contract is run in accordance with ISO9001 accreditation and to your exact requirements. Gary will agree KPIs and be available to you as an alternate contact. Gary's principle objective will be to ensure customer satisfaction, efficiency savings and value for money.

Matthew Corry **Head of Property Services**

Member of The Chartered Institute of Building; BSc Hons (Building Surveying), DipDEA - Domestic Energy Assessor; DipGDA - Domestic Green Deal Assessor; Construction Skills Certification (CSCS); NEBOSH.

Matthew is responsible for all large inspection projects nationally and is experienced in building and leading successful survey and audit teams. Matthew is a member of the Chartered Institute of Building. He is a building surveyor by trade and also a senior Green Deal assessor. Matthew will be the contract lead and will be first point of contact between the client and our team. Matthew will work closely with you to ensure we mobilise effectively and that a close, open and transparent working relationship is developed and maintained. He will ensure we meet all requirements and make sure lessons are learned and improvements are implemented.

Ben Parkinson **Account Manager**

BSc (Hons) Building Surveying; BTEC National Diploma in Construction; P402 - Buildings Surveys and Bulk Sampling in Asbestos; ABBE Level 3 Certificate in Domestic Energy Assessment (QCF).

Ben will act as Account Manager and will work with Matthew to identify the project team, programme, hours of working, survey form content/format, request for access letters, customer liaison, at risk lists, letter of authority, ID badges,

format and timing of reports and void properties. He will lead on delivery and Keystone activity, assisting you to achieve asset management aspirations through: data Interrogation, analysis and cleansing; forecasting and Decent Homes Quality standard compliance obligations.

Abiodun Shotunde **Data Officer**

BSc (Hons) Digital Media Technology; BTec Level 3 Creative Media.

Abiodun is our data officer for all stock condition projects. With an in depth background in technology, Abiodun is responsible for managing all data, from mobilisation to project completion, ensuring a smooth, consistent and high quality service. Abiodun is responsible for setting up database configuration for each project. He has an extensive knowledge of multiple asset management systems, such as QL, Keystone and Promaster and is able to work with a wide range of asset management systems for our clients.

Our surveyors complete stock condition surveys remotely on handheld tablets. It is Abiodun's responsibility to manage the transfer of data collected from surveyors to our client in the agreed format. Once he receives the data, he will validate 100% of all surveys for accuracy. If any errors or gaps are evident, Abiodun will contact the surveyor to rectify any issues. Abiodun records and monitors all issues or errors found to identify any ongoing trends of non-conformance or to identify any refresher training required by a surveyor.

Jade White **Project Manager**

BA (Hons); NFOPP Property Management.

Jade will co-ordinate our team of surveyors to ensure we optimise work across the contract. She is also responsible for interrogating and validating surveyors work in conjunction with Ben Parkinson.

Nat Rimmer **Project Co-ordinator/Resident Liaison Officer**

20/20 Business Insights; Project Controls.

Natalie is in constant contact with surveyors and our customer services team she is key to ensuring a positive and consistent communication is kept between the client, its residents and our surveyors. Natalie will allocate surveyors with address lists and will distribute future appointments proactively so our team always has a work list prepared. Natalie designs and sends out letters of appointment to residents. She will send

reminder text messages closer to appointment dates and will arrange with residents should they require additional support during the appointment, such as female surveyors or a family member or neighbour to be present. Natalie is the first point of contact for residents to answer any queries or respond to a complaint. Her experience working in customer facing roles as well as her training in customer care makes her well equipped to fulfil the role efficiently and effectively.

Niall Towmey **Surveyor**

Member of The Royal Institute of Chartered Surveyors; BSc (Hons): Building Surveying.

Niall is a senior surveyor and also a member of the Royal Institute of Chartered Surveyors (MRICS).

Niall's detailed knowledge of construction methods and regulations ideally place him to support the team if inadequate compartmentation issues are found and provide up to date specifications and remedial measures to enable them to comply with part B of the current building regulations.

Peter Graham **Surveyor**

NEBOSH National General Certificate in Occupational Health and Safety; Level 3 Award in Education and Training; Level 3 First Aid at Work - Instructor; (BOHS) P402 - Surveying and Sampling Strategies for Asbestos in Buildings; Level 3 Diploma: Domestic Energy Assessors; ABBE Level 3: DEA Professional Development.

Peter is a highly experienced surveyor with a range of wide range of qualifications such as NEBOSH, BOHS P402 as well as DEA qualifications. Peter is currently working on multiple large stock condition contracts such as London Borough of Brent Council, Regenda and Six Town Housing.

Neil Johnstone **Surveyor**

BSc Hons (Building Surveying); NEBOSH - Fire Safety & Risk Management FC1 & FC2 Accredited - Construction Skills Certification (CSCS), FPA accredited.

Neil joined Pennington Choices two years ago as part of our graduate training programme. He has supported our team of surveyors on a number of contracts including for Knowsley Housing Trust and Saxon Weald Housing Association.

Liam Butler

Surveyor

BSc (Hons) Building Surveying.

Liam Butler is one of our qualified building surveyors with experience in a range of surveying services including measured surveys, party wall, compartmentation and stock condition surveying. With a background in project coordination for housing development, Liam has in depth experience in using technology such as AutoCAD, Bolster and Magic Plan. Liam is regularly required to deliver stock condition surveys, including HHSRS and RdSAP assessments, across the UK, for clients such as The Guinness Partnership, Gravesham Borough Council and Habinteg Housing Association. His experience means he is familiar with a range of new, old, traditional and non-traditional types of dwellings. He is experienced in working in residents' properties and is respectful, polite and professional during his surveys. Liam is trained to work in environments where residents may be deemed at risk or vulnerable and he is fully DBS checked.

Chris Smith

Surveyor

BSc (Hons) Building Surveying.

Chris is our graduate surveyor and has been part of our graduate training programme for a year. He is an intelligent surveyor with experience working with a range of surveying and floor plan software, such as Keystone, CAD and Magic Plan. His growing knowledge of on-location surveying experience and enthusiastic approach to tasks makes him a dependable surveyor.

Kerry Kelly

Head of Operational Delivery and Resident Liaison Officer

CSCS; NVQ Business Administration.

Kerry oversees our customer services team and is responsible for arranging appointments, contacting residents and dealing with customer queries and complaints swiftly and sympathetically. She has extensive experience in customer services within the housing sector. Kerry implements measures to increase access and maintain regular contact with her team to ensure they are familiar with our client's requirements. Kerry oversees the planning of our customer services team workload to ensure clear accountability and responsibility across the team. She has involvement with projects from the outset, liaising with project managers to identify the needs of clients and in particular, customer services support. Kerry holds daily team briefings to ensure workloads progress according to plan and to share lessons learned arisen from resident suggestions and complaints.

Gary Bampton - Commercial Director

BSc (Hons) Building Surveying; PGDip Surv - Postgraduate Diploma in Building Surveying; Member of Royal Institute of Chartered Surveyors (MRICS)



Experience

Gary is Pennington Choices' commercial director, he is a board member and his focus is business development and growth across the organisation. Gary plays a key role in relation to marketing, new business, brand awareness and client satisfaction across the UK.

Gary is an experienced chartered building surveyor, with specialist social housing experience. Having spent 16 years delivering new build and refurbishment projects for a multitude of social housing providers around the country,

Gary has helped a range of private and public sector organisations to develop asset management strategies and deliver major development and improvement programmes. Gary has substantial experience in both domestic and commercial sectors, providing support services to property owners, management companies and large contractors.

Gary provide an alternative means of contact for our clients and our team to ensure open communication and the smooth delivery of our contracts and a point of escalation in our complaints procedure. His 16 years' experience working within the housing sector combined with his position as commercial director gives him significant knowledge to successfully support projects within the public and private sectors regardless of financial constraints.

Gary is an expert user of our asset management software, Keystone, and has also used other client asset management software when required, giving him a good rounded knowledge of asset management issues.

Key skills

- 16 years' experience in property and asset management.
- Board director and chartered building surveyor with a real understanding of the issues from a client perspective.
- Extensive knowledge in high volume inspection services.

Key experience

Quality director for programme of stock and lift condition surveys and fire risk assessments

London Borough of Hackney

Quality director stock condition assessments

YourMK

Quality director for stock condition surveys

Six Town Housing

Quality director for stock condition surveys

Knowsley Housing Trust

Matthew Corry - Head of Survey Services

Member of The Chartered Institute of Building; BSc Hons (Building Surveying), DipDEA - Domestic Energy Assessor; DipGDA - Domestic Green Deal Assessor; Construction Skills Certification (CSCS) - Professionally Qualified Person



Experience

Matthew is a Member of The Chartered Institute of Building and, as head of survey services, takes responsibility for leading our team of surveyors to undertake large inspection projects nationally.

He has worked with both registered social landlords such as: Six Town Housing, Stoke City Council, Knowsley Housing Trust and Plus Dane Group to provide stock condition surveys, EPCs and fire risk assessments as well as national contractors such as: Wates Living Space, Lovell Partnerships and Wilmott Dixon.

Key skills

- Experience of leading large inspection projects nationally.
- Building and leading successful survey and audit teams.
- Mobilisation, resource planning and co-ordination of multiple concurrent projects.
- Managing KPIs for clients.

Through his previous experience, Matthew understands the importance of early mobilisation of stock condition survey projects. He works with clients to quickly gain an understanding of the scope of the project and ensures our team is prepared prior to work taking place.

His extensive knowledge means he is able to ensure we have sufficient numbers of surveyors with the correct level of experience and expertise to undertake the surveys.

Through his work with similar clients, he has experience of managing KPIs to ensure we not only monitor levels of performance but any poor performance is challenged and addressed. Matthew uses KPI information to feed into our continual improvement programme.

Key experience

Account manager for stock condition surveys

Six Town Housing

Account manager for stock condition surveys

Stoke City Council

Account manager for stock condition surveys and EPCs

Knowsley Housing Trust

Lead energy consultant for an ECO scheme

Wates Living Space

Ben Parkinson - Account Manager

BSc (Hons) Building Surveying; BTEC National Diploma in Construction; P402 - Buildings Surveys and Bulk Sampling in Asbestos; ABBE Level 3 Certificate in Domestic Energy Assessment (QCF)



Experience

Ben has over seven years' experience working within the property sector. Ben is well versed in numerous disciplines including stock condition surveys, energy performance assessments, fire risk assessments and asbestos management.

Ben has worked for a number of clients including local authorities, housing trusts and registered social landlords across England, Wales and Northern Ireland. Ben has successfully performed stock condition surveys on a range of properties, including: houses, bungalows, flats, maisonettes, sheltered schemes and blocks (common parts).

Ben has worked in both vacant and fully occupied properties with vulnerable tenants - giving him a wealth of experience working in dwellings with close attention to tenant care.

Ben is our appointed account manager for stock condition contracts and is the point of contact for client teams throughout the life of a project. He will ensure the smooth delivery of the project from mobilisation to its full completion. He will be the client's first point of contact.

Ben takes responsibility for ensuring our team has the necessary skills, experience and equipment to undertake the surveys. He is also responsible for induction training of our team and providing site specific training where necessary (for example lone working, manual handling or working at height training).

Ben is also an expert user of our bespoke asset management database software system, Keystone. Using Keystone, Ben can create and edited clients' assets and configurations, interface systems with Excel, data check, interpret data analysis for reporting as well as element and repair forecasting.

Key skills

- Seven years' building surveyor experience.
- Proven track record of managing stock condition surveys.
- Knowledge and experience operating in all domestic properties.
- Experienced user of asset management software, including Keystone and Promaster.

Key experience

Account manager for stock condition survey

St Vincent's Housing Association

Account Manager for stock condition survey

Six Town Housing

Account Manager for stock condition survey

London Borough of Hackney

Account manager for stock condition survey

YourMK

Abiodun Shotunde - Data Officer

BSc (Hons) Digital Media Technology; BTec Level 3 Creative Media.



Experience

Abiodun is our data officer for all stock condition projects. With an in depth background in technology, Abiodun is responsible for managing all data, from mobilisation to project completion, ensuring a smooth, consistent and high quality service.

Abiodun is responsible for setting up database configuration for each project. He has an extensive knowledge of multiple asset management systems, such as QL, Keystone and Promaster and is able to work with a wide range of asset management systems for our clients.

Key skills

- In depth experience in technology and data management.
- Excellent validation skills to drive performance.
- Ability to work with a wide range of asset management systems.

Our surveyors complete stock condition surveys remotely on handheld tablets. It is Abiodun's responsibility to manage the transfer of data collected from surveyors to our client in the agreed format. Once he receives the data, he will validate 100% of all surveys for accuracy. If any errors or gaps are evident, Abiodun will contact the surveyor to rectify any issues. Abiodun records and monitors all issues or errors found to identify any ongoing trends of non-conformance or to identify any refresher training required by a surveyor.

Abiodun also manages the manipulation and extraction of data using Keystone asset management software.

Abiodun has acted as data officer for many of our clients on a small to large scale basis. Recent projects include The Guinness Partnership, Curo, Grwp Cynefin, London Borough of Hackney and Wealden District Council, to name a few.

Key experience

Data Officer.

The Guinness Partnership

Data Officer.

London Borough of Hackney

Data Officer.

Plus Dane Housing

Data Officer.

Manningham Housing Association

Jade White - Project Manager

BA (Hons); NFOPP Property Management



Experience

Jade provides direct support to Ben Parkinson in the form of data validation; project plans; project monitoring; managing data submission; organising surveyors' diaries and delivering stock condition surveys during times of high demand.

Jade has responsibility for providing a number of our in-house teams with project support. Through constant and close collaboration with our surveyors, customer services team and project manager, Jade is key to ensuring this project is delivered on time and within budget and she ensures our service remains in line with our quality standards and is delivered right first time.

During our mobilisation phase, Jade develops project plans and monitors project progress once our service commences. She produces internal project reports for our project manager. As part of our communication based culture, her reports will be shared with our team to provide an auditable trail of updates.

Her background within the property sector has provided Jade with the experience to report on project development. Working in harmony with our surveyors and administrators, Jade is ideally placed to identify areas which require additional project support.

Jade will use our asset management system Keystone to regularly validate our surveys. Where Jade identifies areas of non-conformance, she will bring her findings to the attention of our project manager for re-surveying.

Key skills

- Continual desktop and on-site validation.
- Project planning and on-going monitoring.
- Stock condition surveys during times of high demand.

Key experience

Project manager
Colchester Borough Homes

Project manager
Derwent Living

Project manager
Gravesham Borough Council

Natalie Rimmer - Project Co-ordinator/Resident Liaison Officer

20/20 Business Insights; Project Controls.



Experience

Natalie provides direct support to Jade White in the management and co-ordination of surveyors.

Natalie is in constant contact with surveyors and our customer services team she is key to ensuring a positive and consistent communication is kept between the client, its residents and our surveyors.

Natalie assists in preparing project plans and produces internal project reports which is shared across the team to communicate progress and any issues experienced during this time.

Natalie will allocate surveyors with address lists and will distribute future appointments proactively so our team always has a work list prepared.

Natalie designs and sends out letters of appointment to residents. She will send reminder text messages closer to appointment dates and will arrange with residents should they require additional support during the appointment, such as female surveyors or a family member or neighbour to be present.

Natalie is the first point of contact for residents to answer any queries or respond to a complaint. Her experience working in customer facing roles as well as her training in customer care makes her well equipped to fulfil the role efficiently and effectively.

Natalie is responsible for working closely with our stock condition team. She will be used throughout this contract to provide additional support, identify areas of non-conformance and to manage and monitor our workload. Her project reports will be used to support our project manager to deliver monthly meetings, training and data validation.

Key skills

- Excellent customer care and communication skills.
- Provides additional support such as project planning and reporting.
- Strong organisational competencies.

Key experience

Resident liaison officer/project co-ordinator.

YourMK

Resident liaison officer/project co-ordinator.

Derwent Living

Resident liaison officer/project co-ordinator.

Six Town Housing

Niall Twomey - Senior Building Surveyor

Member of Royal Institute of Chartered Surveyors (MRICS); BSc (Hons): Building Surveying



Experience

Niall Twomey is our senior building surveyor at Pennington Choices.

Niall has responsibility for providing our in-house team with project support, through constant and close monitoring and management.

Niall is key to ensuring projects are delivered on time and within budget.

During the lifetime of this contract, Niall will ensure our team remain in line with our quality standards and projects are delivered right first time.

During our mobilisation phase, Niall will develop project plans and monitor project progress once our service commences. He will produce internal project reports and share his reports with our team to provide an auditable trail of updates.

Niall's background within the property industry has provided him with the experience to report on project development and he has accumulated considerable skills in the residential, commercial and industrial sectors.

Niall is ideally placed to identify areas which require additional project support due to his experience gained as a client side building surveyor.

Niall's detailed knowledge of construction methods and regulations ideally place him to support the team if inadequate compartmentation issues are found and advise clients and provide up-to-date specifications and remedial measures to enable them to comply with Part B of the current Building Regulations.

Key skills

- 18 + years client side building surveyor.
- Ability to work on multiple projects simultaneously.
- Project planning and on-going monitoring.
- Strong organisational competencies.

Key experience

Lead surveyor for stock condition survey

Habinteg Housing Association

Lead surveyor for stock condition survey

Manningham Housing Association

Lead surveyor for stock condition survey

Darlington Borough Council

Lead surveyor for stock condition survey

Knowsley Housing Trust

Peter Graham - Building Surveyor

NEBOSH National General Certificate in Occupational Health and Safety; Level 3 Award in Education and Training; Level 3 First Aid at Work - Instructor; (BOHS) P402 - Surveying and Sampling Strategies for Asbestos in Buildings; Level 3 Diploma: Domestic Energy Assessors; ABBE Level 3: DEA Professional Development



Experience

Peter is a highly experienced property surveyor with over nine years' experience providing assessments within the social housing sector. Peter holds P402 qualification, enabling him to undertake an array of asbestos surveys across domestic environments.

Peter provides large scale surveying services for nationwide housing providers. Peter is currently delivering domestic energy assessments for Liverpool Mutual Homes. He is responsible for providing clear and accurate assessments within short timescales for occupied and void properties.

Key skills

- highly experienced domestic energy assessor
- NEBOSH certified
- Qualified first aid instructor

Peter's robust skillset means he is regularly required to undertake an array of building surveying services during one assessment. Peter is capable of undertaking a number of surveys including: stock condition surveys, asbestos related consultancy, energy assessments, floor plans, photovoltaic and fire risk assessments.

Peter acts as Pennington Choices Ltd's health and safety manager; responsible for advising on all areas of health and safety across the organisation. His rounded experience within the construction sector has developed his sound understanding of on-site health and safety measures and industry best practice.

Peter has responsibility for driving the continual improvement of health and safety systems. Through the use of practical measures, regular supervision and a proactive approach to setting training, assessments and targets, Peter has developed an innovative approach to health and safety. His measures are essential to securing staff safety and to maintaining our OHSAS18001 accreditation.

Key experience

Surveyor for stock condition survey

London Borough of Brent

Surveyor for stock condition survey

Six Town Housing

Surveyor for stock condition survey

Regenda

Neil Johnstone - Building Surveyor

BSc Hons (Building Surveying); NEBOSH - Fire Safety & Risk Management FC1 & FC2 Accredited - Construction Skills Certification (CSCS)



Experience

Neil is a building surveyor with over two years' experience, having developed from a graduate position as part of our graduate training programme. He has been involved in a number of stock condition surveys for local authorities and housing associations across the North West.

Recently, he has been supporting our team of surveyors on similar contracts with Knowsley Housing Trust and Saxon Weald Housing Association. Neil is competent user of asset management software whilst on site.

His experience in a wide range of surveying services and training he has received, has provided Neil with the ability to work with all age groups, disabilities, races or at risk persons.

Neil is also a qualified NEBOSH fire risk assessor, and is competent to carry out fire risk assessments on a range of building types. He has experience in undertaking fire risk assessments for both domestic and retail clients.

Key skills

- NEBOSH Qualified
- Experience in retail and domestic Fire Risk Assessments.
- Experience in using Keystone.
- Open and transparent approach to project delivery.

Key experience

Surveyor for stock condition survey

Knowsley Housing Trust

Surveyor for stock condition survey

Saxon Weald

Surveyor for stock condition survey

London Borough of Hackney

Surveyor for stock condition survey

Habinteg Housing Group

Liam Butler - Building Surveyor

BSc (Hons) Digital Media Technology; BTec Level 3 Creative Media.



Experience

Liam Butler is one of our qualified building surveyors with experience in a range of surveying services including measured surveys, party wall, compartmentation and stock condition surveying. With a background in project coordination for housing development, Liam has in depth experience in using technology such as AutoCAD, Bolster and Magic Plan.

In his experience of stock condition surveying, Liam has completed surveys using handheld tablets for a number of different asset management systems such as Keystone, QL and Promaster, to name a few.

As a building surveyor with experience working across the sectors, he is well versed in building regulations such as CDM 2015, as well as health and safety regulations including the Control of Asbestos Regulations (CAR 2012) and he is able to identify immediate risks or hazards during a survey that may require immediate attention of the client.

Liam is regularly required to deliver stock condition surveys, including HHSRS and RdSAP assessments, across the UK, for clients such as The Guinness Partnership, Gravesham Borough Council and Habinteg Housing Association.

His experience means he is familiar with a range of new, old, traditional and non-traditional types of dwellings. He is experienced in working in residents' properties and is respectful, polite and professional during his surveys. Liam is trained to work in environments where residents may be deemed at risk or vulnerable and he is fully DBS checked.

Key skills

- In depth experience working with multiple asset management systems.
- Excellent knowledge of building regulations and health and safety guidance.
- Ability to work with all types of residents professionally and respectfully.

Key experience

Stock condition surveys.
YourMK

Stock condition surveys.
Knowsley Housing Trust

Stock condition surveys.
Six Town Housing

Stock condition surveys.
South Liverpool Homes

Chris Smith - Graduate Building Surveyor

BSc (Hons) Building Surveying.



Experience

Chris Smith is our Graduate Building Surveyor. With a BSc (Hons) degree in Building Surveying, Chris is an intelligent surveyor with experience working with a range of surveying and floor plan software, such as Keystone, CAD and Magic Plan. His growing knowledge of on-location surveying experience and enthusiastic approach to tasks makes him a dependable surveyor for Pennington Choices.

Key skills

- One year building surveyor experience.
- Skilled use of multiple surveying software and programmes.
- Confident and enthusiastic approach to tasks and clients.

Chris' progress to gaining chartered status has seen him undertake building planning applications, pre-entry surveys for large contracts and has successfully assisted in stock condition surveys for councils and housing associations such as Cartrefi Cymunedol Gwynedd, where we delivered a large refurbishment and rebuild scheme.

Chris' knowledge also extends across building surveying, having recently completed a condition survey for Irwell Valley Housing Association. The works included a detailed survey of the windows of a grade II listed building, in preparation of fitting new windows. Chris has also worked on section 20 consultation for FirstPort, regarding the specification of works of a redundant swimming pool.

Key experience

Surveyor for stock condition survey

Cartefi Cymunedol Gwynedd

Surveyor for stock condition survey

Saxon Weald

Surveyor for stock condition survey

Adactus Housing Association

His surveying experience gives him a wealth of understanding to work with all ranges of age groups, disabilities, races, or at risk individuals to create a responsible and professional relationship with clients and their tenants. Chris' eagerness to develop and his proven competency in the building surveyor role gives him the ability to achieve Pennington Choices' expectation of being exceptional, trusted and expert.

Kerry Kelly - Head of Operational Delivery

CSCS; NVQ Business Administration



Experience

Kerry Kelly is our head of operational delivery and our resident liaison officer. She oversees our customer services team and is responsible for arranging appointments, contacting residents and dealing with customer queries and complaints swiftly and sympathetically. She has extensive experience in customer services within the housing sector.

Kerry works with our training manager to keep her team up to date with specific measures for working with residents, including: customer care, equality and diversity, cultural and religious sensitivity and working with at-risk and vulnerable residents.

Kerry oversees the planning of our customer services team workload to ensure clear accountability and responsibility across the team. She has involvement with projects from the outset, liaising with project managers to identify the needs of clients and in particular, customer services support. Kerry holds daily team briefings to ensure workloads progress according to plan and to share lessons learned arisen from resident suggestions and complaints.

Kerry has shared responsibility for supporting monthly report production. She is also responsible for upholding our commitment to respond to all urgent requests within two hours and all routine instructions within 24 hours.

Key skills

- Provision of friendly, focussed and confident customer services nationwide.
- Understanding and proactive solutions to customer requirements.
- Overseeing service planning system and timely responses.
- Regular provision of customer care training to PSD team

Key experience

Head of operational delivery
and resident liaison officer

London Borough of Hackney

Head of operational delivery
and resident liaison officer

London Borough of Brent

Head of operational delivery
and resident liaison officer

Regenda

Our experience and expertise



We have been delivering stock condition surveys since our inception in 2000. We have also been a Keystone user for 14 years and have the necessary experience, track record and resources to carry out contracts to deliver a high quality service to you.

The majority of schemes that we undertake involve capturing both HHSRS & RdSap data. We have a proven track record of providing stock condition surveys through Keystone and enjoy long term relationships with our clients.

We can provide a full list of stock condition survey clients upon request. Our team of surveyors are all qualified and experienced in undertaking stock condition surveys.



We are experienced in the RdSAP methodology and Matthew Corry (head of survey services) and Ben Parkinson (account manager) are qualified domestic energy assessors (DEAs). All of our stock condition surveyors are also qualified DEAs and experienced in collecting RdSAP data via Keystone. We have considerable experience of using Keystone to produce RdSAP 2012 ratings. We have also provided valuable feedback to Keystone in terms of data collection and validation improvements in relation to energy and the link to and from the NHER energy assessment tool.

Our surveyors are also qualified to undertake fully scored HHSRS assessments. We have used Keystone to collect both fully scored and indicative HHSRS information for many years. We therefore have sound knowledge in terms of how Keystone calculates Category 1 and Category 2 hazards.



We also work with national contractors including Wates, Willmott Dixon, Lovell and Keepmoat in relation to delivering component renewal programmes for clients, and maintaining accurate property information.

We use Keystone Asset Management as our software of choice for all stock condition surveys. This allows us to collect, validate and manage the flow of information seamlessly from the surveyors' tablets to your Keystone database. Through our work with other Keystone customers, we are able to run multiple versions of Keystone, so compatibility between database versions is never an issue.

Images show our surveyors on site.

Upon completion of the surveys, you will be furnished with an accurate final report, detailing; Decent Homes, lifecycle replacement costs, HHSRS findings, SAP scores, etc (as you



require). We will also work with you and Keystone's Advanced Data Reporting to 'scenario model' the data. The suite of reports can be agreed at any point throughout the project, hence this gives you time to agree the final outcomes/requirements. Our aim is to always exceed your expectations.

Our Planning, Scheduling and Dispatch Team

To ensure good customer service and an efficient service by our field-based staff, we have a dedicated planning, scheduling and dispatch (PSD) team. Our team is trained alongside our surveyors in customer care, equality and diversity and protecting children and vulnerable adults.



Our PSD team is led by Kerry Kelly and her role is to maximise the productivity of field-base operatives by ensuring they are attending and completing as many work orders as is practical, both in respect of compliance (client/contract response times being met) and also quality (sufficient time is allowed for works order completion).

Kerry works collaboratively with our heads of services and service teams across the business to ensure we have an integrated approach to service delivery. She has a key role at mobilisation of any project to ensure she understands contracts response times and service level agreements for each new project.



Key responsibilities for our PSD team include:

- Handling and resolving telephone and email enquiries from clients, tenants and our own field-based staff.
- Proactive outbound telephone calls to arrange appointments with tenants.
- Liaising with, and directing, field-based operatives.
- Sharing ideas and insight in order to continually improve the PSD function including increasing appointments made, appointments kept and properties accessed.
- Identifying and escalating early warnings for risk to response times/SLAs, productivity outputs and process.
- Understanding the difference between planned and responsive works and the differing approach to each in order to manage demand and minimise cost.

Images show our planning, scheduling and dispatch team

Kerry and the team are constantly reviewing current processes to improve efficiency and productivity of the delivery of surveys. We have implemented an AM/PM appointment slot for surveys in order to maximise productivity, giving flexibility to reorganise time slots to accommodate tenants requirements and to ensure we carry out the maximum number of appointments per day. Our surveyors also work two late evenings per week



Procurement

Commissioning our team is simple as we are appointed to the following frameworks:

South East Consortium - Consultancy Services Framework

Lot 3 Asset Management Surveys.



Fusion21 - Consultants' framework

Lot 2 - Stock monitoring and appraisal.



Procurement for Housing - Technical Support Services

Lot 1 - Asset management.

Re:allies

Lot 3 - Stock condition and building surveyor.



Direct appointment may be possible from these frameworks and this saves time and money for clients when they require the service for a programme of work.

The compliance health check was an excellent way to see how we were performing across all areas of compliance. The quality of the report clearly demonstrated the level of knowledge and expertise available within Pennington Choices and has been invaluable in raising the profile of health and safety across the organisation.

Matthew Roberts
-Wigan and Leigh Homes

Innovation and Added Value

We are a dynamic multi-disciplinary organisation providing a wide range of property-related, technical and professional services to the public and private sectors.

We specialise in all areas of statutory compliance, asset management and organisational management. In addition to stock condition surveys, we also provide:

- Fire risk assessments.
- Domestic and commercial gas auditing and consultancy.
- Electrical condition reports, electrical auditing and consultancy.
- Asbestos surveys, sample analysis, air monitoring, awareness training and consultancy.
- HHSRS surveys and advice.
- Water hygiene; risk assessments and inspections.
- EPCs.

Compliance Health Check

Our senior team has operated at director level for social landlords of all types. This experience has enabled them to develop a new support service for our social housing clients. Our compliance health check provides a structured assessment to determine the extent of compliance risks and any gaps in compliance.

We check against statutory requirements and best practice, drawing on HSE guidance, codes of practice and industry guidelines. We can tailor the service areas covered in the health check to meet client's specific needs.

Typically, our compliance health check includes an in-depth detailed audit of one or more specific compliance area that our client may have concerns about, for example, fire safety.

Our consultant will undertake technical auditing, including on-site inspections and testing of records and the auditing may include specialist areas such as lifts, playgrounds, lightning conductors and fire alarms.

Compliance Masterclass

We want to remain at the very forefront of industry best practice to enable us to provide an innovative service to our clients. In order for us to do this, we work in collaboration with others within our industry to deliver statutory compliance masterclasses. Our statutory compliance masterclass is a free event which is open to anyone who is interested in, and wants to learn about, statutory compliance best practice particularly chief executives, chairs, housing, property and asset directors, heads of service and managers as well as policy managers.

Our last event was hosted in May 2018. Maxine Loftus, head of operations at Incommunities, and Charlie Norman, group chief executive of St. Vincent's Housing Association, joined Lee Woods, our operations director, to discuss recent compliance challenges. Topics included; how Manchester responded to Grenfell and their approach to fire safety; understanding electricity safety obligations; and learning how to build a fit-for-purpose asbestos management plan.

Dates for future events are published on our website and further information can be obtained by emailing:

events@penningtonchoices.org.uk



Compliance Masterclass
Lee Woods, our operations director, delivering his message on compliance.

Case study: Salix Homes

Project value
£600,000

Project overview

Salix had previously undertaken a 10% sample survey in preparation for becoming an arms-length management organisation (ALMO). They then needed to assemble detailed information on the housing stock to feed into business planning, allowing for detailed programme planning and decent homes works delivery. At the same time Salix wished to collect full RdSAP (software) data to allow for the future production of energy performance certificates.

Our local stock condition team planned and delivered a stock condition and energy survey. Originally timetabled to take place over 3 years, we completed the survey over 18 months and achieved an access rate of in excess of 90%. We assisted the client to migrate the data into their asset management

software, Keystone, having previously collected the data in this format. We developed a detailed programme of investment works, focused on achieving decency.

We delivered the survey, ahead of time and to budget, achieving a very high access rate for this area and type of stock. Our work on the survey and asset management planning was a central part of Salix achieving their two star rating.



“Pennington Choices have been a vital part of our service improvement and decent homes delivery plans. Without the quality and timeliness of the survey that they have undertaken, we would not be where we are today.”

- Stephanie Clueit, Asset & Procurement Management

Case study: Plus Dane Housing

Project value

£154,000

Project overview

Plus Dane Housing own and manage over 18,000 homes across Merseyside and Cheshire. Our team of asset managers and stock condition surveys was appointed to deliver asset management assistance and 4,000 stock condition surveys for Plus Dane Housing.

We began by gaining third party access to the housing association's Keystone database to identify significant gaps within key areas. During this initial review, we analysed the main asset list, survey sample, component configuration, survey designs, schedule of rates and lifecycles to identify inaccuracies or discrepancies. We conducted this review ahead of commencement on site to ensure the Keystone database was fit for purpose; allowing our team to rectify issues and build a sound foundation for all future stock condition surveys, as opposed to further compounding errors.

In addition to reviewing the Keystone database for accuracy and completeness, our asset managers also made sure it was fully operational for the housing association's needs. Satisfied with the Keystone database, we began the process of determining a representative survey sample. We identified all surveyed properties and those which had partial datasets; this allowed us to identify which properties required surveys in order to plug gaps in the sample.

We revised the component configuration in accordance with our client's needs and constructed appropriate survey designs compatible with our Keystone enabled handheld devices. Finally, in collaboration with Plus Dane Housing's in-house asset management team we provided an accurate schedule of rates and lifecycles.

Our stock condition surveyors began the process of collecting classification, component, HHSRS and RdSAP data following the completion of our asset management review. Once we have collected the data we provide Plus Dane Housing with a KGI Excel sheet ready to be uploaded into the Keystone database. Throughout the life of the contract, we remained in close collaboration with our client. We produced weekly reports to formally documents our progress, performance and other key items such as access rates and KPIs. Regular meetings with our client allowed us to share information and guide key project managers through their Keystone database.

Our significant Keystone expertise meant we was able to add significant value to this contract. We delivered two Keystone workbench training sessions with key Plus Dane Housing managers. During these sessions we delivered training on the vast reporting functionalities of Keystone. We provided managers with the skills and understanding to run a number of essential reports; Decent Homes (to monitor compliance), 30-year forecasting (to schedule works and costs) and energy reporting (to measure efficiency).

Case study: Dudley MBC

Project value
£160,000

Project overview

Dudley Metropolitan Borough Council owns a significant number of high-rise blocks, traditional and non-traditional houses, bungalows and sheltered schemes across the West Midlands of England. On March 2013, Dudley MBC appointed our expert team to deliver stock condition survey validation reports throughout a number of their housing stock.

Upon appointment, we met with our client to discuss and agree an achievable programme of works and to forensically analyse Dudley MBC's existing asset management database. We used MI views to interrogate the data accordingly, in order to give our client an understanding of their existing data accuracy.

This allowed our client to see issues and key information such as the number of instances where attributes, install dates and renewal years were incorrect. We are a licensed Keystone user, we started this process by taking a copy of Dudley MBC's Keystone database, and transferring it to their server. Our team took a representative sample, as identified and agreed with our client and used

their own hardware to conduct the validation surveys. Following the validation surveys, we provided a suite of reports as detailed by Dudley MBC and provided survey data in KGI sheets; a format that fit seamlessly into our client's database.

As an organisation at the forefront of operating with Keystone, we were able to compare existing survey records with newly validated data, whilst using Keystone's sophisticated 'Advanced Data Reporting'. The data transfer of completed survey information was completed without input from the Keystone helpdesk via KGI sheets and SAP scores were calculated using NES minimum dataset SAP.

Working proactively, the survey was successfully completed first time using the agreed survey form we had discussed with our client during the mobilisation period of this contract. To date, our team are proud to announce we have succeeded in meeting all key performance indicators DMBC have outlined, and have enjoyed a positive working relationship with our client.



Case study: London Borough of Brent

Project value
£225,000

Project overview

The London Borough of Brent (LBB) was established in 1965 and is responsible for managing and maintaining over 12,000 properties in the district by means of housing associations, co-operatives and the council itself. They required a suitably qualified and experienced consultancy to deliver a number of stock condition, as well as engineering and specialist M&E, surveys to their property portfolio.

The London Borough of Brent required stock condition surveys and accurate and statistically reliable reports for their 12,000 properties, ranging from houses to communal block flats. This will require our surveyors to work individually to complete all surveys within a turnaround time of 15 weeks. To ensure the safety of our staff, we have implemented a market leading lone working system combined with a comprehensive risk management

system. Our team are issued with a lone working device which allows our health and safety management team to view and monitor staff movements. The device can also contact our alarm receiving centre in the event of an emergency. Our vans are also fitted with tracking systems which our staff can log in to.

We have dedicated a large team of surveyors to work throughout the borough. With use of handheld devices, our surveys are completed and submitted to KAM daily. As licensed Keystone customers for over 15 years, we can make sure our reports are accurate, also user friendly and loaded directly onto the LBB database. We have also set up report templates to help LBB produce a wide range of report outputs in the future. We also manage sub-consultant teams of specialists, such as MAND lift surveyors and Procter Contracts (automatic gate compliance consultants) to meet the specific requirements of the contract.



Case study: YourMK

Project value

£292,000

Project overview

Milton Keynes Council currently own 11,237 properties across a broad geographical area, but are primarily clustered within estate settings. These property types typically range in age from 1970s through to the 1980s, with various forms of construction and archetypes used through the development stage.

The council has embarked on an ambitious programme to maximise value for money by moving expenditure away from reactive repairs to planned works programmes. To facilitate this, robust asset condition data was required to inform immediate, interim and long term investment need. YourMK was formed to deliver the repairs and maintenance service to all Milton Keynes Council owned properties and lead on a major regeneration programme. Your MK is required to deliver a strategic asset management function to Milton Keynes Council.

Milton Keynes Council appointed our team of stock condition surveyors and asset managers to deliver approximately 8,600 surveys across their property portfolio. These surveys were broken down in to 5,783 individual dwellings and 2,828 block dwellings. The purpose of our surveys was to allow the council to prioritise and coordinate disparate demands, such as repairs, provision for accessibility, the requirement for energy efficiency upgrades and component replacements within a limited budget.

To determine the overall financial provision needed to maintain the stock for the next 30 years, during the survey we provided:

- An assessment on the physical condition of the asset and attributes.
- Energy performance data.
- Photographic records displaying condition and location of components.
- HHSRS.

Milton Keynes Council required a range of asset management support in addition to collecting stock condition information. Throughout the surveying phase, our team assisted in the development of a Keystone information database to support policy and strategic decision-making.

Following the completion of surveys we determined the cost of developing properties up to the required standards and subsequently maintaining their improved condition. Our gap-analysis provided the basis for YourMK to develop their long-term maintenance programme; ensuring all properties demonstrated compliance with legislation, standards and good practice. Our asset management support allowed YourMK to rationalise budgets based on need, instead of historic expenditure; enabling accurate decisions founded on sound data.

Finally, we measured the performance of YourMK's maintenance management policies by reviewing stock condition over previous years. This allowed us to benchmark their performance against other similar sized organisations (with similar budgets) to determine how YourMK compared to its counterparts.

Case study: London Borough of Hackney

Project value

£330,000

Project overview

London Borough of Hackney appointed our team to deliver surveys to two of their neighbourhoods; surveying blocks, estates and individual residential units. The surveys required are not the traditional component based stock condition surveys. Instead, we deliver a more place-based approach as all estates will be visited once every eight years as part of the council's major works programmed around our visits.

The scope of the programme focuses significantly on the common parts and the block externals and includes elements of refurbishment that have been traditionally beyond the scope of a conventional stock investment programme.

The Grenfell Tower disaster caused major concerns to housing providers across the UK. The tragic events highlighted the importance of rigorous fire safety systems and the importance of compliance. Our commencement date was postponed to allow London Borough of Hackney to address concerns exposed by Grenfell Tower and implement processes to identify and address potential deficiencies across their housing stock.

We worked flexibly and sensitively to agree a revised programme. We reallocated in-house resources to other contracts during this time but remained available to provide advice and insight for the duration of this period.

Satisfied with their internal reviews, we commenced mobilisation to finalise the survey scope and timescales. The council uses

Codeman/MobileSAM software to house and collect their asset information. We tailored our systems to ensure they were compatible with the council's and delivered a series of pilot surveys to reality test our approach. We used our experience and findings to provide practical feedback and advice following the pilot surveys.

We have a wealth of experience working with a range of software systems, including Codeman, to deliver large scale surveying services. Equipping surveyors with handheld devices running MobileSAM software allowed us to transfer data directly into the council's Codeman database.

During surveys we examine the condition of a number of specified components and produce an estimation on their remaining life. This includes internal and external elements and M&E installations.

Our dedicated planning, scheduling and dispatch team arrange appointments with residents. Similarly, we collaborate with building managers to arrange access and obtain keys for access to common areas of estates. We are required to work responsively and flexibly to survey void properties as and when they arise.

Today, we continue to work harmoniously with London Borough of Hackney. We are successfully achieving our agreed programme and the transfer of data is seamless and efficient.

Case study: Bolton at Home

Project value

£19,000

Project overview

Bolton at Home own and manage more than 18,000 properties across the borough. Their housing stock was transferred from Bolton Council following a vote of support from existing residents. Their housing stock includes houses, bungalows, blocks of flats and sheltered schemes. Bolton at Home also manage a range of commercial stock. These properties number libraries, community centres and retail shops.

Bolton at Home needed to appoint a suitably experienced and qualified property consultancy to deliver a comprehensive stock condition programme across a number of their retail shop units. Bolton at Home required the appointed consultancy to deliver property inspection in such a way that did not disturb the on-going trade of the shop or the domestic flats located above the majority of retail units.

On February 2016, our team of stock condition surveyors and asset managers were appointed to deliver the commercial stock condition programme across 39 retail shop units. We surveyed each commercial unit internally and externally using our stock condition survey methodology. This process assessed the age of each key building component including:

- Windows.
- Doors.
- Roofs.
- Shop front.
- Shutters.

Alongside delivering external surveys, our surveyors completed internal surveys using the same methodology. Priority repairs identified during the survey were recorded. This meant that when we produced our final report, Bolton at Home had a clear understanding of priority works. Both internal and external surveys recorded structural issues and (where necessary) we made recommendation for a detailed in-depth structural survey.

We assessed the condition of each component via the provision of a renewal year. The collected data was compiled into a final schedule of condition report detailing the state of repair for key components. Bolton at Home had also required the provision of detailed floor plans on each of the commercial units. As a multi-disciplinary property consultancy providing this service for other housing providers, we were ideally placed to support our client. Whilst our team completed the stock condition surveys, we also produced floor plans. These were drawn on-site using our surveyors' handheld devices. Finally, we provided a suite of photographs taken on our surveyors' handheld devices to support our reports with visual evidence.

