



## **BRIDPORT AREA COMMUNITY HOUSING OPPORTUNITY & PROJECT MANAGEMENT**

### **SUMMARY**

This document describes the principles by which Bridport Area Community Housing's (BACH) Opportunities and Projects will be managed.

The first section provides a simplified overview of a typical venture that BACH, may embark on.

The second section is a more detailed technical description of the strategic, control and work processes that will be adopted as a notional framework in order to achieve a successful outcome.

In the background to the assessment of any opportunity and execution of the resultant project, BACH will manage its overall business in line with its Business Plan.

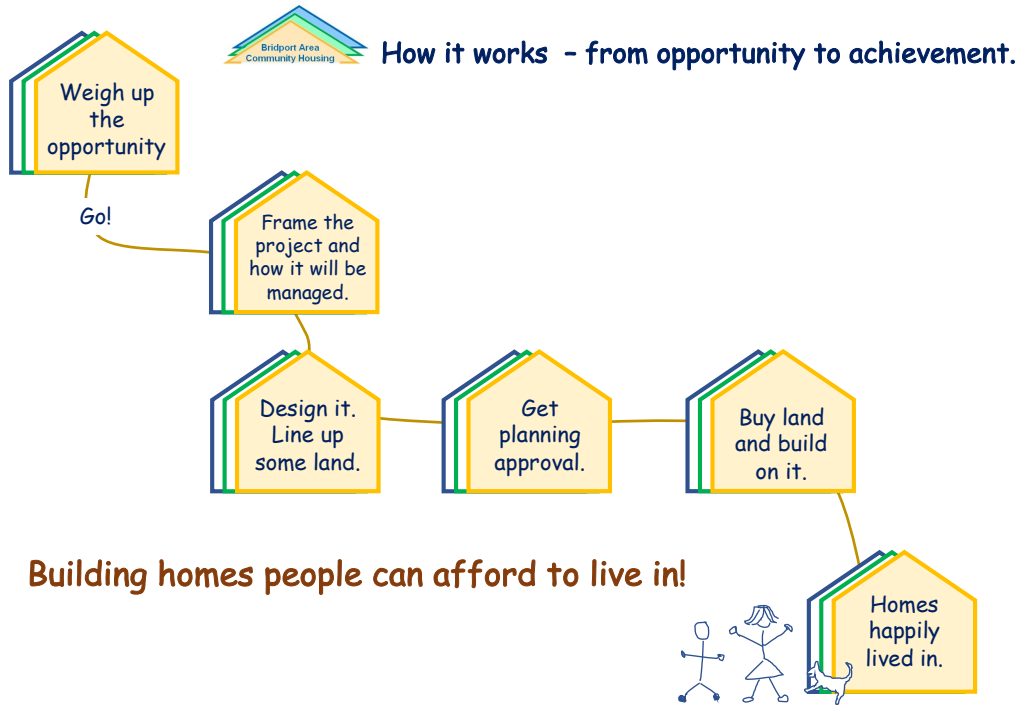
**DRAFT 1B: 15<sup>TH</sup> MARCH 2021 – TEXT IN RED IS CHANGE FROM DRAFT 1**

*Bridport Area Community Housing Ltd. is registered under the Co-operative and Community Benefit Societies Act 2014 as a Community Benefit Society.*

*Registration date: 4<sup>th</sup> November 2020, Registration number: 8493  
Address: Mountfield, Rax Lane, Bridport, Dorset, DT6 3JP  
Financial year-end date: 31 March*

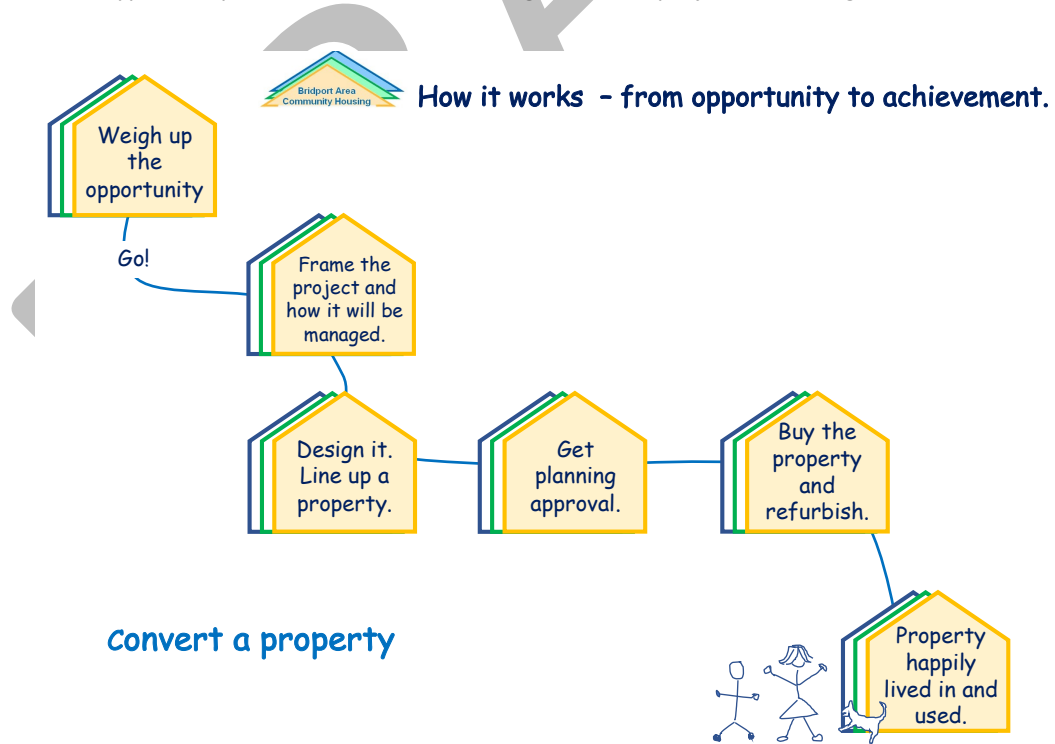
## OUR APPROACH PUT SIMPLY

### THE FUNDAMENTAL ROUTE MAP



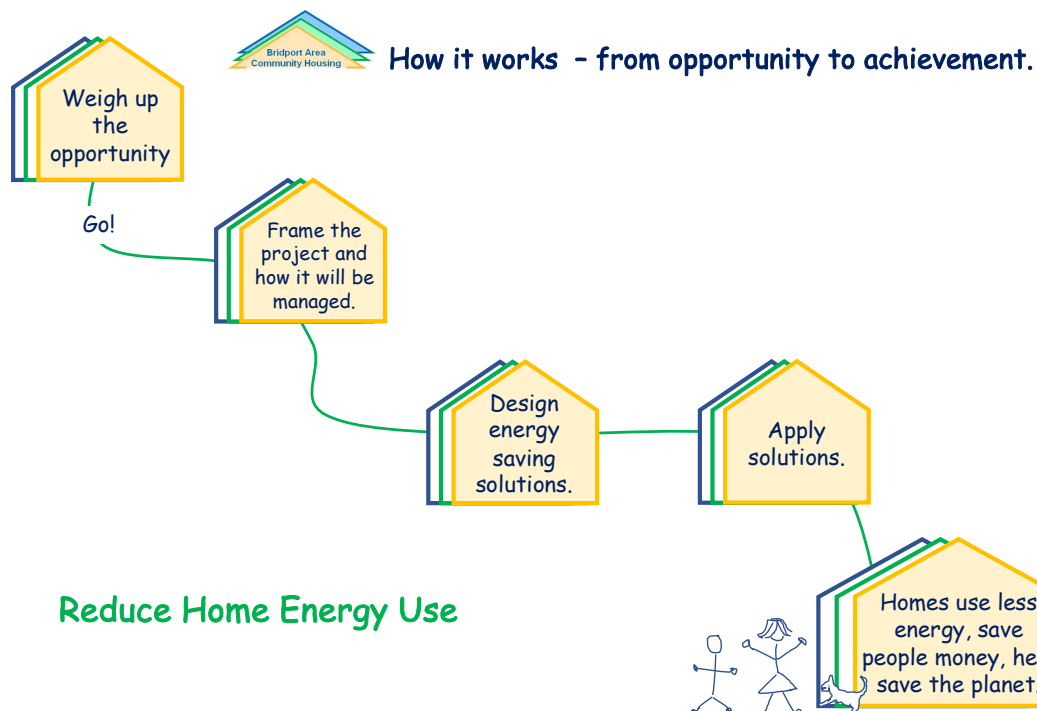
### Building homes people can afford to live in!

This is a typical sequence of events for a straightforward project delivering affordable housing.

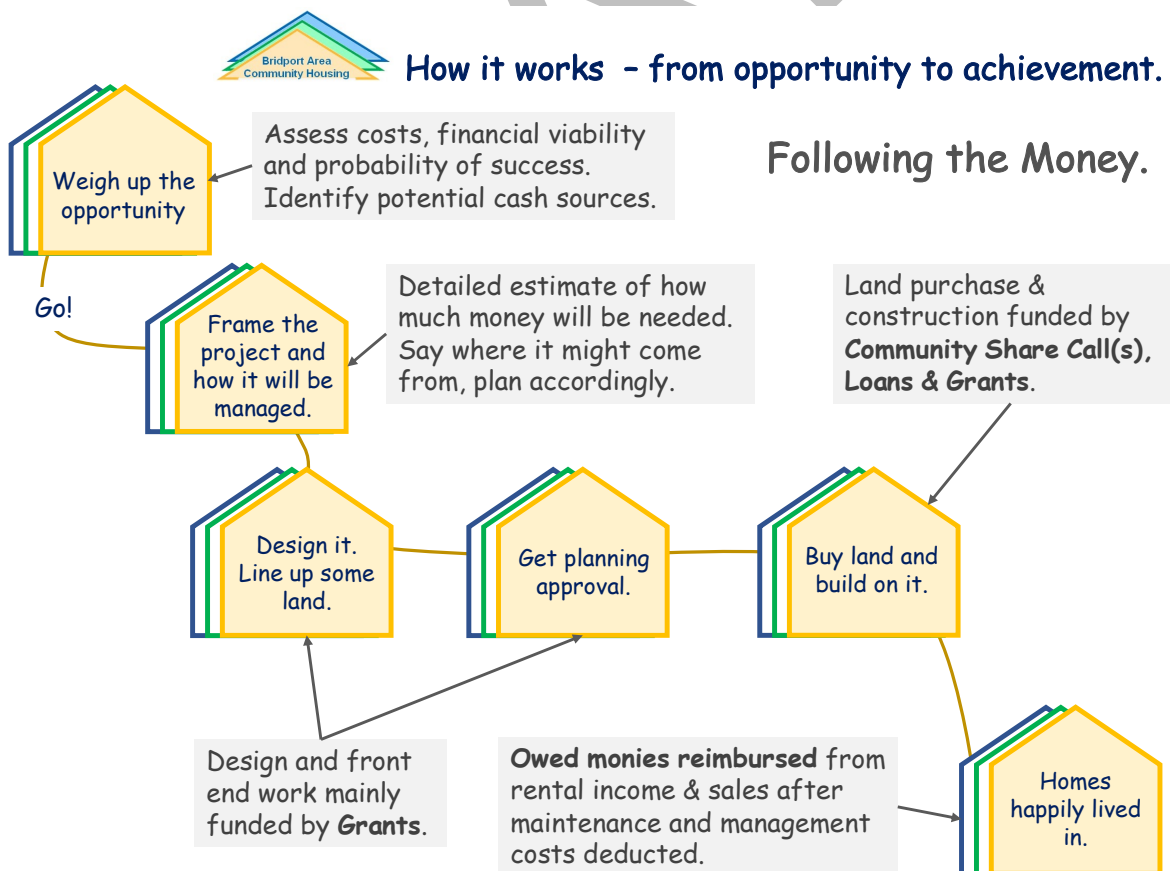


### Convert a property

And a typical sequence for a project where we purchase a property and refurbish it as affordable homes (possibly, combined with commercial premises for small businesses).



A simplified sequence for projects aimed at reducing home energy consumption which would save those living there money, and help reduce environmental emissions.



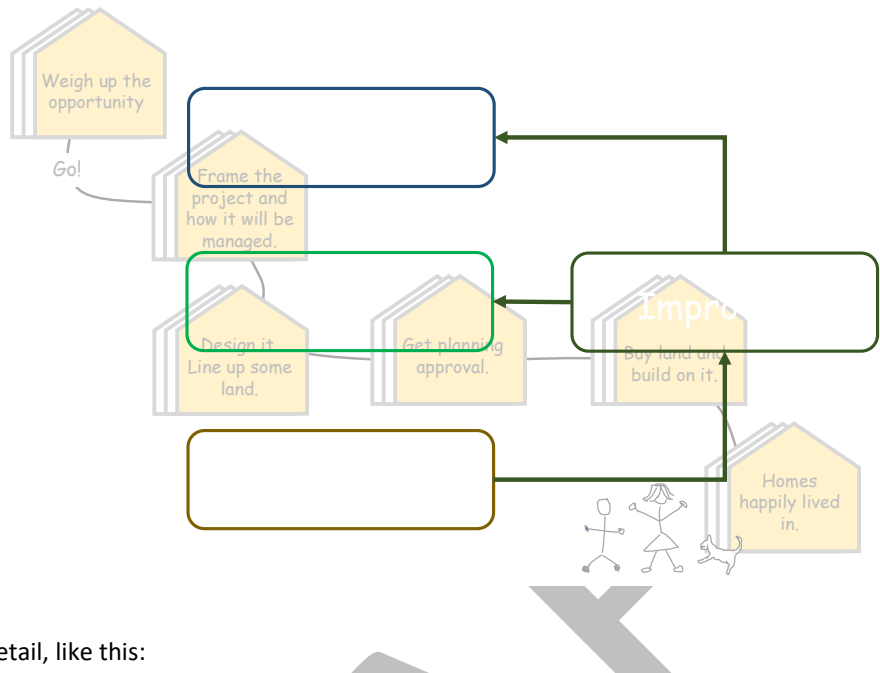
And finally, this represents a typical project financing approach showing potential sources of funding.

# OPPORTUNITY & PROJECT MANAGEMENT GUIDE

## SYSTEMATIC MANAGEMENT

Throughout the various journeys towards a successful project good overall, and day-to-day, management is essential.

At each step a systematic approach to management by the BACH team will be adopted. It will look like this.....



And in more detail, like this:



### OUR APPROACH IN DETAIL

#### THE PROCESSES

The three processes that define BACH's approach to Opportunity and Project Management are shown in the table below.

The management of BACH's opportunities and projects involve the management of:		
<b>Strategic Process:</b> Enabling the opportunity to be defined to realise its maximum value.	<b>Control Processes:</b> Providing the framework within which the work to realise the project is performed.	<b>Work processes:</b> The processes used to get the work done.

#### STRATEGIC PROCESSES

These address questions such as: What is the opportunity? Is it potentially doable and viable? If so, what are the risks and what is needed to be in place for it to be a success?

STRATEGIC PROCESSES				
Strategy Formation	Risk Management	Critical Success Factors	Finance	People
Framing Project execution planning Contracting strategy	Downside risk Upside risk	Critical success factors	Budgets, Funding streams Viability	Organisation Resources Roles & Responsibilities Skills & competencies

#### CONTROL PROCESSES

These define the control framework within which the work to realise the project is performed.

CONTROL PROCESSES				
Work Planning	Cost management & Funding	Contracting & Procurement	Quality	HS & Env & Social
	Information management	Change management	Reporting, monitoring & analysing	Audit & review

#### WORK PROCESSES

These are the distinct steps (phases) to be taken to execute a typical BACH project. In this case an affordable housing development.

Other projects, such as a property conversion or an energy conservation initiative, would adopt the same principles.

WORK PROCESSES	
<p style="text-align: center;"><b>Phase 1</b></p> <p>Opportunity Concept Assessment</p>	<p>Assess opportunity:                      Objective: To be able to confidently decide if to go ahead.                      Deliverable: An assessment study report with recommendations.                      Study would include:</p> <ul style="list-style-type: none"> <li>• Opportunity description (including optional approaches)</li> <li>• Potential direct and indirect benefits</li> <li>• Risks &amp; critical success factors</li> <li>• Cost &amp; resource forecasts</li> <li>• Contracts, contract strategy</li> <li>• Organisational framework (including non-BACH entities)</li> </ul> <p>The report and its interrogation would provide the basis for the Board’s decision.</p>
<p style="text-align: center;"><b>Phase 2</b></p> <p>Project Start-up</p>	<p>Objective: To document the working framework with which to manage the project and obtain start-up funding.                      Deliverable: Approved Project Execution Plan                      Prepare a Project Execution Plan covering:</p> <ul style="list-style-type: none"> <li>• Objectives &amp; deliverables</li> <li>• Strategy, stakeholders, and involved parties</li> <li>• Land or property aspects, intended affordable home types, <b>tenure</b>/leasing arrangements, Housing Association involvement, etc.</li> <li>• Plan &amp; schedule</li> <li>• Risks (risk register)</li> <li>• Cost/budget forecasts, funding strategy, resource requirements (BACH and other), contracts, organisation, roles &amp; responsibilities, etc., i.e., the BACH Project Management System</li> </ul> <div style="text-align: center;"> <p>The diagram, titled 'Project Management System Structure', is contained within a light blue box. At the top, it lists 'Leadership, Commitment, Continuous Improvement'. Below this are five stacked boxes: 'Strategic Objectives &amp; Policies' (yellow), 'Organisation, Roles, Responsibilities, Resources, Competence, Communication, Documentation, Contractors' (orange), 'Risks &amp; Risk Management' (green), 'Planning &amp; Procedures' (light green), and 'Implementation &amp; Monitoring' (dark grey). At the bottom is 'Audit &amp; Review' (yellow). Arrows on the right side point from each of these five boxes up to a green box labeled 'Corrective action'. An arrow then points from 'Corrective action' back down to the 'Implementation &amp; Monitoring' box, indicating a feedback loop.</p> </div> <p>Using the approved Project Execution Plan as leverage:</p> <ul style="list-style-type: none"> <li>• Pursue project start-up funding</li> <li>• Recruit project people</li> </ul>

## OPPORTUNITY & PROJECT MANAGEMENT GUIDE

WORK PROCESSES	
<p><b>Phase 3</b></p> <p>Pre-planning application implementation.</p>	<p>Objective: To submit an application for outline planning permission and prepare for next phase.</p> <p>Deliverable: Completed application ready for submission. Readiness if successful.</p> <p>Activities include:</p> <ul style="list-style-type: none"> <li>• Secure land subject to planning approval (or if a property conversion project, secure property)</li> <li>• Prepare the outline planning application submission               <ul style="list-style-type: none"> <li>○ Design &amp; preliminary specification</li> <li>○ Site surveys</li> <li>○ Environmental, flood, traffic etc. studies and impact assessments</li> <li>○ Documentation</li> <li>○ Hold pre-application meetings with local authorities</li> </ul> </li> <li>• Plan for next stage including preparing for Community Share Issue, <b>loan &amp; grant applications</b>, contract tender preparation, marketing strategy.</li> </ul>
<p><b>Phase 4</b></p> <p>Apply for (outline) planning permission.</p>	<p>Objective: Secure outline planning permission</p> <ul style="list-style-type: none"> <li>• Submit application</li> <li>• Respond to questions/clarifications</li> <li>• Attend Planning Meetings</li> </ul> <p>If initial application is not successful:</p> <ul style="list-style-type: none"> <li>• Revise and re-submit</li> </ul>
<p><b>Phase 5</b></p> <p>Share call Land purchase Assign homes Construction &amp; Commissioning</p>	<p>Objective: Deliver homes, assign occupancy, occupants move in.</p> <p>Key Activities:</p> <p>Funding:</p> <ul style="list-style-type: none"> <li>• Issue Community Share call, <b>secure loans, secure grants.</b></li> </ul> <p>Land:</p> <ul style="list-style-type: none"> <li>• Purchase land</li> </ul> <p>Design:</p> <ul style="list-style-type: none"> <li>• Detailed design tender &amp; contract award</li> <li>• Design execution</li> </ul> <p>Construction:</p> <ul style="list-style-type: none"> <li>• Construction &amp; materials tender &amp; contract award</li> <li>• Other tenders &amp; awards</li> <li>• Construction</li> <li>• Commissioning and handover</li> </ul> <p>Occupancy management:</p> <ul style="list-style-type: none"> <li>• Market homes including tenure mode, (rental, ownership, etc.)</li> <li>• Assign homes, sign contracts</li> <li>• Handover homes to occupants</li> </ul>
<p><b>Phase 6</b></p> <p>Reimburse share calls Operate &amp; Maintain site &amp; homes</p>	<p>Objective: Reimburse share calls, operate &amp; maintain site and homes</p>