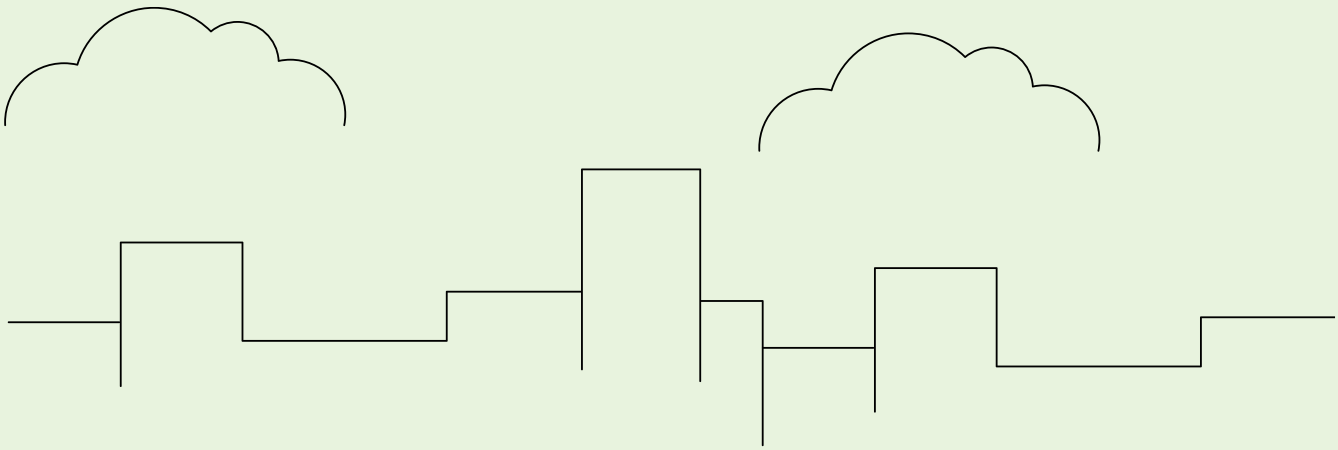
# Asset Management Strategy
2026 – 2029

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# Salix Homes Vision:

**Salix Homes will provide more than good quality, affordable homes, it will support our customers and colleagues to achieve their potential, ensuring everything we do as an organisation will be for the benefit of our customers. This is *'The Salix Way.'***

The Asset and Sustainability Strategy 2026-29 sets out how Salix Homes will drive improved asset services which meet the needs of our customers and enhances the long term sustainability of the business.

# Salix Homes Values:

Whilst our vision defines our aspirational future goal, our values set the principles that guide our behaviours as we set about achieving this goal. Our values are the core beliefs that shape our culture, and define our expectations, which are:

**Trustworthy**



**We are trustworthy – We gain the confidence and trust of others through integrity and accountability.**

**Successful**



**We are successful – We are constantly improving by remaining informed and working collaboratively to achieve success.**

**Inclusive**



**We are Inclusive – We advocate for others whilst embracing and promoting inclusion.**

These values will be visible throughout delivery of this strategy. We will be open about the condition and performance of our homes, use data led evidence to make robust decisions, listen to diverse customer needs, and take responsibility for delivering safe, sustainable and high-quality outcomes.

# Corporate Plan Ambitions

Our Corporate Plan, "The Salix Way 2026-2029", confirms where we will focus our activity over the next three years through five ambitions:

- Our ambition for Customers: Our customers receive great customer service and value and trust Salix Homes as their landlord.
- Our ambition for Homes: Our customers live in warm, safe and well-maintained homes.
- Our ambition for Communities: Our customers live in well-maintained neighbourhoods and play an active role in making communities better places to live.
- Our ambition for Business: We have an efficient, resilient and well-managed organisation.
- Our ambition for Colleagues: We have skilled, talented and engaged colleagues in an environment that enables and supports them to provide great customer service.

This strategy is designed principally to achieve our ambition for homes. It also supports the ambitions for customers, communities, business and colleagues – because asset performance, safety, affordability, environmental sustainability and service quality are integral to customer trust and organisational resilience.

Our defining outcome is clear: customers should live in warm, safe and well-maintained homes. We will achieve this through responsive and preventative maintenance, rigorous safety and compliance, improved energy performance, better asset intelligence and investment decisions that balance customer outcomes, risk, sustainability and financial capacity.

Our Corporate Plan, 'The Salix Way 2026 – 2029' communicates and confirms where we will focus our activities over the next three years

# Strategic Priorities

To achieve our ambition for homes, the following strategic priorities have been set:

- Deliver a high-performing repairs and maintenance service, underpinned by strong building safety and property compliance.
- Improve the energy efficiency of our homes and establish a deliverable pathway towards net zero by 2028.
- Improve our knowledge of our homes through stock condition surveys, integrated data and insight, maximising the impact of future investment plans.

These priorities are mutually reinforcing. Accurate data supports proportionate safety decisions and targeted investment. Salix Homes have been proactive in undertaking stock condition surveys to our homes on a 3 year cycle and will continue to ensure we hold the most accurate data to inform our investment programmes with the target of delivering effective planned investment which reduces avoidable repairs. Our continued commitment to energy improvements ensure we provide warmer and more affordable homes and customer insight ensures that we target services and programmes that respond to people as well as properties.

Salix Homes are focused on proactive invest and maintenance of our homes alongside the delivery of sustainable growth. Our Growth Strategy 2026-29 sets out how Salix Homes will respond to local housing need while maintaining the highest standard of customer service, regulatory compliance, and financial resilience. This is directly aligned to the continued investment in our existing assets which is set out within this Strategy.

# Delivery of Strategic Priorities

Each strategic priority is aligned to strategic actions that will be managed through annual delivery plans and the corporate planning cycle. The phasing is based on the following principles:

- Year 1 activities, 2026-2027, establish foundations, maintain our regulatory requirements and enhance the alignment of our asset and customer systems, standards and investment assumptions.
- Year 2 activities, 2027-2028, build on these foundations through implementation, integration, evaluation and service development.
- Year 3 activities, 2028-2029, embed and optimise the new approaches, demonstrate sustained outcomes and inform the next strategy period.

Delivery will remain responsive to customer insight and demand. Our stock condition data will be used alongside any emerging hazards, regulatory change, financial capacity, market conditions and the availability of external funding. These factors will be incorporated into the active asset management of our stock to ensure that our investment programmes contribute to our long term financial strength. Any material change to scope, risk, investment or intended outcomes will be considered through established governance arrangements.

## The Wider Social Sector Context

Social landlords are operating in an environment of sustained pressure on household finances, public services and organisational resources. Customers expect reliable core services, prompt action when homes are unsafe, clear communication and evidence that landlords are investing responsibly. At the same time, climate adaptation, decarbonisation, construction cost pressures and supply-chain capacity require long-term thinking and disciplined prioritisation.

Asset and sustainability decisions have consequences beyond physical condition. A warm, secure and accessible home supports the health, wellbeing and independence of our customers. Poor condition, unresolved hazards or unaffordable heating can deepen inequality. This strategy, therefore, treats investment in our homes as both an essential landlord responsibility and a key contributor to wider social outcomes.

Technology and data are changing how organisations understand demand and manage assets. Used responsibly, integrated information can help identify patterns, anticipate failures, target inspections and coordinate interventions. Our approach will retain appropriate professional judgement, data governance, transparency and safeguards against exclusion or bias.

## The Housing Sector Context

The housing sector is subject to heightened consumer regulation, more explicit expectations regarding safety and quality, and stronger requirements for transparency, accountability and resident influence. The Safety and Quality Standard requires registered providers to understand the condition of their housing stock, provide an effective repairs service and ensure homes are safe, well maintained and of appropriate quality.

The Building Safety Act 2022 and Fire Safety Act 2021 have strengthened responsibilities relating to fire and structural safety. Awaab's Law introduced time-bound requirements for investigating and addressing specified hazards. Changes to electrical safety, fire safety evacuation planning, heat-network regulation and the Decent Homes Standard also influence our operating model, data requirements and investment priorities.

The sector must also improve the energy performance of homes while protecting affordability and organisational viability. Retrofit measures must be technically appropriate, coordinated with planned maintenance and be supported by meaningful customer engagement. External funding will remain important, but our plans must be based on a clear understanding of whole-life cost, deliverability and resident benefit.

## The Salford and Salix Homes Context

Salix Homes is a place-based landlord rooted in Salford, managing a diverse portfolio that includes high-rise buildings, independent living homes, communal areas and specialist housing. This diversity requires an approach that is risk-based and responsive to the characteristics of individual homes, buildings and customers rather than relying on broad assumptions.

The 2023 – 2026 Asset Management Strategy established five connected themes: property investment, asset data and active asset management, building safety, energy efficiency and net zero carbon, and responsive maintenance. It also committed to a three-year stock condition cycle, stronger NPV assessment, continued investment in safety and a pathway to EPC C and net zero. This strategy carries those principles forward and aligns them to the 2026-2029 Corporate Plan.



Our next phase is to convert stronger asset and customer information and established compliance arrangements into a more predictive, coordinated and customer-focused model. This includes implementing a new asset management solution, improving integration between asset and repairs information which will ensure the correct investment is made at the right time to improve the financial performance of our assets. This strategy will continue our retrofit programmes, deliver the Cladding Safety Scheme project and evaluate opportunities to bring selected safety services in house where this improves control, capability and value.

**This strategy has been co-created with customers and colleagues.**

## 1 Strategic Priority 1: Deliver a high-performing repairs and maintenance service, underpinned by building safety and compliance

### Strategic Intent

**To provide a responsive, preventative and customer-focused repairs and maintenance service that keeps homes safe, resolves hazards promptly, delivers work right first time and uses insight to reduce repeat demand. Safety and compliance will remain non-negotiable - with clear ownership, competent delivery and evidence-based assurance across all relevant property risks.**

## Why This Matters

Repairs and safety are among the most visible expressions of our landlord responsibilities. Delays, repeat visits, poor communication or incomplete information undermine trust. Effective diagnosis, clear updates and quality of work improve both customer experience and value for money.

Our operating environment requires us to implement successive phases of Awaab's Law, implement the revised Decent Homes Standard, maintain robust compliance across the "big six" and wider property risks. Delivery of cladding remediation works and respond to new requirements for electrical safety, heat networks and residential personal emergency evacuation plans. Salix Homes will proactively implement all regulatory requirements and prioritise the improvements that benefit our customers. To ensure this Salix Homes will ensure:

- Safety decisions will be based on accurate records, inspection and professional judgement.
- Customer vulnerability and communication needs will inform access, prioritisation and service delivery.
- Repairs, voids, stock condition and tenancy insight will be connected to identify recurring problems and opportunities for preventative intervention.

## Our Approach

Salix Homes will combine strong regulatory control with service improvement and prevention. We will:

- Maintain clear accountable-person, duty-holder and contract-management arrangements.
- Use risk-based assurance, audit and exception reporting across statutory and landlord health and safety obligations.
- Strengthen diagnosis, scheduling, customer communication, quality control and post-work learning.
- Shift the balance where appropriate from reactive activity to planned and preventative maintenance.
- Build the competence, capacity and supply-chain resilience needed to deliver consistently.

## Strategic Actions – Year 1 (2026 – 2027)

By the end of Year 1, Salix Homes will:

- Implement phase 2 of Awaab's Law and ensure supporting policy, triage, investigation, escalation, communication and record-keeping arrangements are embedded.
- Pilot a predictive service approach - bringing together stock condition, repairs and tenancy insight.
- Review the Salix Standard to incorporate the new Decent Homes Standard.
- Embed requirements arising from new fire safety RPEEP regulations, including contact and record updates for customers with registered vulnerabilities.
- Implement changes aligned to heat-network regulations.

- Progress delivery of the Cladding Safety Scheme project through an established programme, risk, procurement, customer-engagement and financial controls.
- Complete the transition from ten-year to five-year electrical installation condition reporting and achieve 100 per cent coverage.
- Scope and implement improvements to our compliance data reporting to strengthen evidence, exception management and assurance.

*This phase focuses on continued regulatory compliance and assurance and testing a more preventative model.*

## Strategic Actions – Year 2 (2027 – 2028)

By the end of Year 2, Salix Homes will:

- Assess the operational and customer impact of phases 1 and 2 of Awaab's Law and implement the final phase due in 2027.
- Implement service and process changes arising from the predictive service pilot.
- Assess and embed the operational impact of heat-network requirements and the revised Salix and Decent Homes standards.
- Continue delivery of the Cladding Safety Scheme project and associated resident engagement.
- Review options to integrate MRI Assets and MRI Repairs data, reducing duplication and improving end-to-end visibility.
- Use repairs quality, repeat-demand, complaint and satisfaction insight to target service improvement and contract management.

*This phase focuses on integrating learning, improving consistency and demonstrating that new requirements translate into better customer outcomes.*



## Strategic Actions – Year 3 (2028 – 2029)

By the end of Year 3, Salix Homes will:

- Continue delivery of the Cladding Safety Scheme project in line with the approved programme.
- Assess the third year of the predictive service approach and embed effective interventions into business-as-usual delivery.
- Evaluate the potential to bringing selected compliance services in house, where value for money and enhanced customer outcomes can be achieved.
- Use trend analysis and post-completion learning to refine planned-maintenance priorities and reduce avoidable repeat repairs.

*This phase focuses on optimisation, sustainable delivery models and measurable prevention of failure and repeat demand.*

## Measures of Success

Progress and impact will be measured through:

- Achieving at least 80 per cent customer satisfaction with the repairs service to be measured through Tenant Satisfaction Measures (TSMs).
- Customer satisfaction with time taken to complete the most recent repair will improve from the Year 1 target of 75 per cent to 80 per cent in Years 2 and 3.
- At least 80 per cent of customers are satisfied that their home is safe.
- 100 per cent compliance with the five-year electrical safety inspection requirement.
- Delivery of the Cladding Safety Scheme project against approved milestones, budget, risk and customer-engagement controls.
- Improved right-first-time performance and reductions in repeat repairs and avoidable complaints.



- 100% of homes meet the Decent Homes Standard.

## Outcomes

By the end of the strategy period, Salix Homes will have:

- A repairs and maintenance service that is reliable, accessible and trusted by customers.
- A stronger preventative approach that identifies recurring property risks before they escalate, proactively maintaining the safety of our customers and quality of our homes.
- Clear evidence of compliance across building safety and property safety obligations.
- Cladding and other major safety works delivered through controlled programmes with customers informed and supported.
- Better coordination between repairs, investment, compliance, customer and tenancy *information.*
- A delivery model with the competence, capacity and resilience to meet current and emerging requirements.

## 2 Strategic Priority 2: Improve the energy efficiency of our homes and establish a deliverable pathway towards net zero

### Strategic Intent

**To improve the warmth, affordability and environmental performance of our homes through a fabric-first, evidence-led and customer-centred approach. We will establish the cost and delivery pathway to net zero, prioritise homes below EPC C and coordinate retrofit with planned maintenance, building safety and long-term asset decisions. Salix Homes have made significant improvements in the energy efficiency of our assets and have delivered works at scale as demonstrated at Grey Friar Court and White Friar Court.**

**Salix Homes will continue the delivery of works to enhance the energy efficiency of our assets and ensure that our communal heating systems fully comply with the Heat Network Regulations.**

## Why This Matters

Energy efficiency is central to providing warm homes and managing the impact of energy costs on customers. It also forms a significant part of Salix Homes' long-term investment requirement and environmental responsibilities.

Retrofit choices must work for the building and the household. Poor sequencing, inappropriate technology or insufficient customer support may increase cost, disruption or have unintended consequences. Decisions will, therefore, use retrofit assessments, condition data, whole-life cost, technical standards and customer insight to ensure the right investment decisions are made.



- We will prioritise the homes and customers who can benefit most, while maintaining a transparent portfolio-wide plan.
- We will seek external funding but retain clear internal assumptions on cost, capacity and future liabilities.
- We will coordinate energy interventions with component replacement and safety works wherever this improves value and reduces disruption.

## Our Approach

Our approach will be planned, proportionate and informed by the highest quality data and outcomes-led. We will:

- Establish a clearly costed baseline and route map for achieving net zero across homes and business activity.
- Target investment to homes below EPC C, informed by validated EPC and stock condition information.
- Apply recognised retrofit standards and competent assessment, design, installation and evaluation.
- Engage customers before, during and after work, including practical support to use new systems effectively.
- Measure energy performance, customer experience and unintended consequences, not simply installation volumes.

## Strategic Actions – Year 1 (2026 – 2027)

By the end of Year 1, Salix Homes will:

- Establish the estimated cost, sequencing, dependencies and delivery choices for Salix Homes to achieve net zero.
- Develop a portfolio plan to improve properties to EPC C, including prioritisation criteria, funding assumptions and delivery capacity.
- Complete the Grey Friar and White Friar retrofit programme and capture learning on performance, resident experience and delivery.
- Deliver a targeted retrofit programme to stock below EPC C.
- Align retrofit investment with planned component replacement, damp and mould prevention, ventilation and building-safety considerations.

This phase focuses on establishing a robust pathway, completing current programmes that target the least energy-efficient homes.

## Strategic Actions – Year 2 (2027 – 2028)

By the end of Year 2, Salix Homes will:

- Continue the retrofit programme for homes below EPC C, subject to validated data, funding and technical assessment.






- Complete the delivery of Heat Network Efficiency Scheme (HNES) programme to improve the efficiency of our poorest performing communal heating systems.
- Evaluate completed schemes using property performance, cost, quality and customer feedback, applying learning to future specifications.
- Develop supply-chain, procurement and internal capability required for a sustained programme.

*This phase focuses on scaled delivery, evaluation and strengthening organisational and supply-chain capability.*

## Strategic Actions – Year 3 (2028 – 2029)

By the end of Year 3, Salix Homes will:

- Continue targeted retrofit to homes below EPC C and refresh portfolio priorities using updated condition and energy data.
- Update the net-zero route map and cost model to reflect delivery learning, technology, funding, regulation and the Business Plan.
- Embed energy and carbon considerations into option appraisal, investment planning, procurement and disposal decisions.

- Demonstrate how energy investment has improved homes, supported customers and informed the next strategy period.
- This phase focuses on embedding sustainability within asset decision-making and confirming the next investable phase.

## Measures of Success

Progress and impact will be measured through:

- A year-on-year reduction in the number and proportion of homes below EPC C, with 95% of our homes to be rated EPC C or above by 2029, with a minimum of 80 homes improved each year during the strategy.
- Completion of the Grey Friar and White Friar retrofit programme, with benefits and lessons evaluated.
- Delivery of annual retrofit outputs within approved cost, quality, safety and customer-satisfaction parameters.
- A Board-approved, costed and regularly refreshed pathway towards net zero.
- Evidence that retrofit measures are appropriately assessed, designed, installed and evaluated.
- Improved customer understanding of energy systems and positive satisfaction with completed works.
- Secured external funding and demonstrable leverage where opportunities align with strategy and risk appetite.
- Energy and carbon impacts incorporated into NPV, option appraisal and long-term investment decisions.

## Outcomes

- By the end of the strategy period, Salix Homes will have:
- More customers living in warmer and more energy-efficient homes.
- A clear, affordable and evidence-led pathway towards EPC C and net zero.
- Retrofit investment coordinated with safety, condition and component programmes.
- Customers supported through change and able to use new technologies confidently.
- Better evidence on cost, performance and resident outcomes to guide future investment.
- Sustainability embedded as a core consideration in asset management and procurement.

## 3 Strategic Priority 3: Improve our knowledge of our homes and maximise the impact of investment

### Strategic Intent

**To create a reliable single view of each home and use condition, compliance, repairs, energy, customer and financial insight to make transparent and proactive investment decisions. We will strengthen stock condition coverage, implement an integrated asset management solution and embed NPV and option appraisal within portfolio management.**

## Why This Matters

Sound asset decisions depend on complete, current and usable information. Data gaps can obscure hazards, distort long-term investment requirements and lead to inefficient or poorly targeted work. Better information supports earlier intervention, stronger assurance and more credible financial planning.

Salix Homes have implemented a three-year stock condition cycle which provides a systematic baseline to inform our investment planning. However, this must be complemented by information gathered through repairs, voids, compliance inspections, planned works and customer contact. The objective is not simply to

collect data, but to maintain evidence that can be used confidently.

- Decisions will balance financial and non-financial factors, including safety, demand, accessibility, customer impact, neighbourhood role, energy performance and long-term sustainability.
- Retention and improvement of homes remains the starting point. Alternative options will be considered only through controlled appraisal and governance.
- Data ownership, definitions, validation, access and change control will be explicit.

## Our Approach

Salix Homes will move from fragmented and periodic information towards an integrated, active asset-management model. We will:

- Undertake a stock condition survey for every asset within a three-year cycle, including relevant communal areas.
- Implement a new asset management solution that consolidates core property information.
- Capture updates from work completed and wider business interactions, reducing the decline of data quality between surveys.
- Use NPV and multi-factor option appraisal to prioritise investment and understand asset sustainability.
- Connect asset insight to the 30-year Business Plan and annual programme-setting process.

## Strategic Actions – Year 1 (2026 – 2027)

By the end of Year 1, Salix Homes will:

- Introduce a new asset management solution to consolidate data and enable a single view of properties.
- Implement a refreshed NPV methodology and define how financial and non-financial factors will inform option appraisal.



- Continue the three-year stock condition surveying programme - with clear arrangements for access attempts, exceptions, validation and data loading.
- Define data ownership, quality standards, core datasets and assurance reporting across Assets, Repairs, Compliance, Finance and Customer services.
- Use improved data to validate the investment programme and long-term Business Plan assumptions.

*This phase focuses on system implementation, data governance, baseline coverage and consistent decision rules.*

## Strategic Actions – Year 2 (2027 – 2028)

By the end of Year 2, Salix Homes will:

- Review delivery of the three-year stock condition cycle and address access, quality, capacity or coverage gaps.
- Develop methods to collect and validate asset information through repairs, voids, compliance activity and planned works.
- Progress integration between asset and repairs systems and improve reporting that connects condition, demand, cost and customer outcomes.
- Apply NPV and option appraisal to identified outliers, high-cost voids and homes requiring significant retrofit or component investment.

*This phase focuses on integrated information, active use of insight and quality improvement.*

## Strategic Actions – Year 3 (2028 – 2029)

By the end of Year 3, Salix Homes will:

- Embed rolling data-refresh processes so property records are updated as work and inspections are completed.
- Use predictive analysis to identify emerging failure patterns and inform preventative programmes, with appropriate governance and professional oversight.
- Evaluate the effect of NPV and option appraisal on programme choices, asset performance and value for money.
- Refresh the long-term investment requirement and provide a robust evidence base for the next Assets and Sustainability Strategy.

- This phase focuses on mature data stewardship, predictive insight and sustained evidence-led investment planning.

## Measures of Success

Progress and impact will be measured through:

- 100 per cent of assets receiving a stock condition survey within the three-year cycle.
- Improved completeness, accuracy, timeliness and reconciliation of agreed critical asset and compliance data.
- A new asset management solution embedded and used as the authoritative source for defined property information.
- NPV assessments and proportionate option appraisals completed for agreed categories of asset and used demonstrably in decisions.
- Reduced manual reconciliation, duplicate records and unexplained differences between core systems.
- Investment plans and 30-year Business Plan assumptions supported by current condition, cost and energy evidence.
- More investment directed towards planned and preventative activity where this improves customer outcomes and value.

- Clear audit trails showing the evidence, rationale, approval and review of significant asset decisions.

## Outcomes

By the end of the strategy period, Salix Homes will have:

- A reliable single view of Salix Homes' properties and their key risks, condition and investment needs.
- A three-year condition cycle supported by continuous updates from service activity.
- Transparent portfolio decisions that balance safety, customers, communities, sustainability and financial resilience.
- Better targeting and sequencing of investment, reducing avoidable cost and disruption.
- Improved confidence in long-term investment and Business Plan assumptions.
- A mature active asset-management approach able to identify emerging issues and opportunities earlier.



# Legal and Regulatory Compliance

Salix Homes is committed to delivering this strategy in accordance with applicable legislation, regulatory standards, contractual obligations and recognised professional and technical standards. Compliance is integral to prioritisation and delivery and is not treated as a separate workstream.

The legal and regulatory environment will continue to evolve during this strategy. Relevant areas include:

- Building and fire safety
- Landlord health and safety
- Electrical and gas safety
- Asbestos
- Water hygiene
- Lifts and other mechanical systems
- Housing health hazards
- Awaab's Law,
- Decent Homes Standard
- Minimum Energy Efficiency Standard (MEES)
- Heat-network regulations

Salix Homes will monitor the regulatory framework to ensure we:

- Maintain clear legal and regulatory registers, have accountable ownership and evidence relevant requirements.
- Translate change into assessed impacts, commissioned actions, updated policies and competent delivery.
- Record and monitor statutory inspections, remedial actions, exceptions and overdue items.
- Retain accessible evidence capable of supporting assurance to customers, Board and regulators.
- Escalate material non-compliance, data gaps or capacity constraints through established governance.

# Governance, Horizon Scanning and Assurance

Executive responsibility for delivery will sit within the Senior Leadership Team, supported by accountable service leads and the relevant second- and third-line assurance functions. The Assets and Sustainability Committee will maintain strategic oversight and provide assurance to the Board. Customer Committee input will inform matters relating to service design, resident experience and communication.

A three-lines of defence approach will distinguish operational control, corporate oversight and independent assurance. Reporting will focus on outcomes, risk, exceptions, data quality, delivery confidence, customer impact and forward decisions rather than activity alone. To ensure this is achieved, Salix Homes will:

- Maintain a horizon-scanning process covering regulation, policy, technology, construction markets, climate risk and funding.
- Report progress to the Asset and Sustainability Committee on delivery of the strategic actions.
- Use internal audit, compliance validation, technical audit, customer feedback and independent review proportionately.
- Review delivery plans where external change, evidence or performance indicates that assumptions are no longer valid.
- Ensure that any significant programme, procurement and portfolio decisions follow delegated authority and Board-approved financial and risk frameworks.

# Customer Engagement and Insight

Customer engagement is fundamental to the successful delivery of this strategy, understanding our customers' lived experience and priorities will shape the design and delivery of our investment programmes and maintenance services. Our Customer Engagement Strategy sets out how Salix Homes will ensure that our customer voice is heard and how we will act on feedback including learning from complaints that we receive.

The delivery of our energy efficiency programme will be directly informed by what provides best value for our customers to ensure that our homes are efficient and warm. To achieve this Salix Himes will engage with customers before, during and after work, including practical support in how to use new systems effectively.

Annual reports will be submitted to our Customer Committee to ensure that we are actively demonstrating how our engagement activity shapes the delivery of this Strategy.

# Equality, Diversity and Inclusion (EDI) Commitments

Equality, diversity and inclusion are embedded throughout this strategy. Asset design, repair processes, communication, access arrangements, adaptations, decanting, safety engagement and retrofit can all affect customers differently. We will, therefore, consider equality impacts at strategy, programme and individual-service levels.

Our aim is to remove avoidable barriers and provide equitable outcomes. This does not always mean identical delivery. Reasonable adjustments and tailored support will be used where needed, while decisions remain transparent, evidence-led and consistent. Salix Homes will therefore:

- Use customer and equality data appropriately to understand differential access, experience and outcomes.
- Provide accessible communication and choice of channels throughout repairs and investment programmes.
- Take account of vulnerability and mobility in appointments, safety planning, temporary moves and work sequencing.
- Continue to provide and coordinate aids and adaptations - working with relevant partners.
- Assess equality impacts for material policy, programme and service changes.
- Engage diverse customers and use feedback to improve specifications and delivery.



# Value for Money (VfM) Commitments

This strategy supports value for money by directing resources towards outcomes that protect customers, maintain homes, reduce avoidable demand and sustain the organisation. Value is considered across the life of an asset and includes quality, safety, social and environmental benefits as well as initial cost.

Investment choices will be informed by stock condition, compliance, customer experience, energy performance, demand, whole-life cost, NPV and the 30-year Business Plan. Procurement and contract management will secure appropriate quality, resilience and social value across our delivery. To achieve this Salix Homes will:

- Coordinate repairs, planned maintenance, retrofit and safety work to reduce duplication and customer disruption.
- Use competitive procurement and active contract management, with clear quality and performance standards.
- Test investment assumptions and delivery capacity through the Business Plan.
- Use option appraisal for high-cost, low-performing or strategically significant assets.
- Track benefits and post-investment outcomes, including repeat demand and customer satisfaction.
- Maximise appropriate external funding without creating unfunded future liabilities or compromising strategic priorities.

# Strategic Risk

The Asset and Sustainability Strategy will ensure that we deliver our core services and long term investment that is aligned with Salix Homes' operational capacity and focused on delivering high performing homes for our customers.

The Board has an "open" risk appetite for asset management and repairs. This reflects a willingness to take managed risks in this area to ensure that strategic asset management decisions generate the best value for customers and the organisation. This approach is balanced with the need to maintain financial sustainability and prioritise investment in existing homes to meet regulatory requirements.

The following strategic risks are directly related to the delivery of the Asset and Sustainability Strategy. Delivery of the associated actions and relevant investment programmes will be reported to the Assets and Sustainability Committee, and our Board:

**Risk 19 – Asset Management**

To minimise this risk Salix Homes will:

- Implement new property standards following the confirmation of Decent Homes revised standards.
- Complete the stock condition survey programme on a 3 year cycle.
- Use Net Present Value to assess stock performance in our investment planning.
- Deliver the actions set out within this Strategy.

**Risk 37 Failure to achieve Net Zero Carbon requirements**

To minimise this risk Salix Homes will:

- Develop fully costed plan to achieve Net Zero across Salix asset.
- Undertake Retrofit Assessments to identify the most effective investment to improve the energy performance of our asset.
- Where appropriate secure external funding to deliver retrofit programme.

# Implementation and Review

This strategy will be supported by a detailed annual action plan that identifies accountable owners, milestones, resources, dependencies, measures, strategic-risk links and governance routes. Actions will be incorporated into service plans and individual programme controls rather than managed as a disconnected strategy workstream.

Progress will be reviewed at least every six months, with regular operational monitoring between formal reviews. A concise dashboard will report Corporate Plan measures, safety and compliance exceptions, repairs performance, stock-condition coverage, data quality, retrofit delivery, financial performance, customer outcomes and key risks.

The strategy will be formally refreshed if there is a material change in legislation, regulatory expectation, corporate priorities, financial capacity or evidence concerning the condition and performance of the portfolio. A full evaluation in Year 3 will inform the strategy and investment plan for the following period.

# Appendix 1: Asset Management Strategy Action Plan

## Strategic Actions Year 1

**Deliver a high performing repairs and maintenance service**

- Implement phase 2 of Awaab's Law
- Pilot a new approach to support predictive service delivery encompassing stock condition, repairs and tenancy
- Review the Salix Standard incorporating the new Decent Homes Standard.
- Embed new 'Fire Safety RPEEPs (Residential Personal Emergency Evacuation Plans) Regulations
- Implement changes aligned to new Heat Network Regulations
- Delivery of the Cladding Safety Scheme Project
- Electrical Safety transition from 10-year to 5-years
- Scope out/Implement new Compliance Data Asset System

**Improve the energy efficiency of our homes**

- Establish costs for Salix Homes to achieve Net Zero
- Develop plan to improve all properties to EPC C
- Complete delivery of Grey Friar & White Friar Retrofit programme
- Deliver Retrofit programme to stock below EPC C

**Improve our knowledge of our homes through more stock condition surveys, using this data and insight to maximise the impact of our future investment plans**

- Introduce new asset management solution to support consolidation of data to enable single view of properties
- Implement a new Net Present Value (NPV) approach.

## Strategic Actions Year 2

**Deliver a high performing repairs and maintenance service**

- Assess phases 1 and 2 of Awaab's Law and impact on service delivery and performance.
- Implement last phase of Awaab's Law due 2027
- Implement changes and develop new processes to support the new approach to support predictive service delivery encompassing stock condition, repairs, and tenancy following the pilot project.
- Assess the impact and changes aligned to new Heat Network Regulations
- Assess the impact and changes aligned to the new Salix Standard Decent Homes Standard.
- Delivery of the Cladding Safety Scheme Project
- Review options for MRI Assets and MRI Repair data systems to integrate.

**Improve the energy efficiency of our homes**

- Deliver Retrofit programme to stock below EPC C
- Continue the retrofit programme for homes below EPC C, subject to validated data, funding and technical assessment.
- Complete the delivery of Heat Network Efficiency Scheme (HNES) programme to improve the efficiency of our poorest performing communal heating systems.
- Evaluate completed schemes using property performance, cost, quality and customer feedback, applying learning to future specifications.
- Develop supply-chain, procurement and internal capability required for a sustained programme.

**Improve our knowledge of our homes through more stock condition surveys, using this data and insight to maximise the impact of our future investment plans**

- Review delivery of Stock Condition Survey 3-year cycle and options to collect asset data through wider business activities
- Review delivery of the three-year stock condition cycle and address access, quality, capacity or coverage gaps.
- Develop methods to collect and validate asset information through repairs, voids, compliance activity and planned works.
- Progress integration between asset and repairs systems and improve reporting that connects condition, demand, cost and customer outcomes.
- Apply NPV and option appraisal to identified outliers, high-cost voids and homes requiring significant retrofit or component investment.

## Strategic Actions Year 3

**Deliver a high performing repairs and maintenance service**

- Delivery of the Cladding Safety Scheme Project
- Assess year 3 of new approach to support predictive service delivery encompassing stock condition, repairs and tenancy
- Scope out options for brining further services in house i.e Gas / Electrical Safety

**Improve the energy efficiency of our homes**

- Deliver Retrofit programme to stock below EPC C
- Continue targeted retrofit to homes below EPC C and refresh portfolio priorities using updated condition and energy data.
- Update the net-zero route map and cost model to reflect delivery learning, technology, funding, regulation and the Business Plan.
- Embed energy and carbon considerations into option appraisal, investment planning, procurement and disposal decisions.
- Demonstrate how energy investment has improved homes, supported customers and informed the next strategy period.

**Improve our knowledge of our homes through more stock condition surveys, using this data and insight to maximise the impact of our future investment plans**

- Embed rolling data-refresh processes so property records are updated as work and inspections are completed.
- Use predictive analysis to identify emerging failure patterns and inform preventative programmes, with appropriate governance and professional oversight.
- Evaluate the effect of NPV and option appraisal on programme choices, asset performance and value for money.
- Refresh the long-term investment requirement and provide a robust evidence base for the next Assets and Sustainability Strategy.

## Progress Measures

**Deliver a high performing repairs and maintenance service**

**Year 1**

- TSM – satisfaction with repairs 80%
- TSM- satisfaction with time taken 70%
- Electrical Safety – 5-year EICR 100%
- Pilot Repair MOT scheme 10%
- RPeep's - 100% of customers with a registered vulnerability contacted and records updated

**Year 2 and 3**

- TSM – satisfaction with repairs 80%
- TSM- satisfaction with time taken 75%
- Delivery of the Cladding Safety Scheme Project 50% as a longer project than a corporate plan.

**Improve the energy efficiency of our homes**

**Year 1**

- Completion of the Grey Friar and White Friar retrofit programme, with benefits and lessons evaluated.
- A Board-approved, costed and regularly refreshed pathway towards net zero.

**Year 2 and 3**

- A year-on-year reduction in the number and proportion of homes below EPC C, with 95% of our homes to be rated EPC C or above by 2029, with a minimum of 80 homes improved each year during the strategy.
- Delivery of annual retrofit outputs within approved cost, quality, safety and customer-satisfaction parameters.
- Evidence that retrofit measures are appropriately assessed, designed, installed and evaluated.
- Improved customer understanding of energy systems and positive satisfaction with completed works.
- Secured external funding and demonstrable leverage where opportunities align with strategy and risk appetite.
- Energy and carbon impacts incorporated into NPV, option appraisal and long-term investment decisions.



**Improve our knowledge of our homes through more stock condition surveys, using this data and insight to maximise the impact of our future investment plans**

**Year 1**

- 100% of assets to have received attempt to complete a stock condition survey within 3 years
- Improved completeness, accuracy, timeliness and reconciliation of agreed critical asset and compliance data.
- A new asset management solution embedded and used as the authoritative source for defined property information.
- NPV assessments and proportionate option appraisals completed for agreed categories of asset and used demonstrably in decisions.
- Reduced manual reconciliation, duplicate records and unexplained differences between core systems.
- Investment plans and 30-year Business Plan assumptions supported by current condition, cost and energy evidence.
- More investment directed towards planned and preventative activity where this improves customer outcomes and value.
- Clear audit trails showing the evidence, rationale, approval and review of significant asset decisions.

## Corporate Plan Measures

- 80% of customers are satisfied with the repair service provided by Salix Homes.
- 75% of customers are Satisfaction with time taken to complete their most recent repair.
- 80% of customers are Satisfaction that the home is safe.
- 80% of customers are Satisfaction that the landlord keeps communal areas clean and well maintained

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