

Project Reference / Number		HEART			Version & Date					
Project Name		DRAFT- HEART Strategic Development Plan 2023 -2024			Version 1.0					
Project Description		Strategic Improvement Plan for the Home Environment Assessment and Response Team (HEART) Service 2023-2024			July 2023					
Line No	Summary of Tasks	Linked actions	Board Owner	Operational Owner	Quantity		Completion Date	Current Update	Previous update	
					Percentage %					
					Start Date	End Date				Action Status
<b>1</b>	<b>Business Plan</b>								<b>Update from meeting on 4th July 2023</b>	
1.1	Annual review of HEART Business Plan		Angela Coates	Paul Coopey	30/06/2023	31.12.23	On Target	We will review this after we have considered Paul Coopey's annual report. End date to be amended from 30.09.23 to 31.12.23		
<b>2</b>	<b>Partnership Agreement</b>									
2.1	The Updated Partnership Agreement to be approved by all Partners and signed		Angela Coates		24/03/2023	04/07/2023	On Target	Angela provided the agreement for sign off and the Host is organising signatures		
2.2	Terms of Reference to Reflect Partnership Agreement requirements		Angela Coates		03/05/2023	04/07/2023	On Target			
<b>3</b>	<b>Service Delivery Model</b>									
3.1	Exploration of the new Foundations self-serve options for customers to be carried out by the service and a report prepared for Board on its potential uses for the HEART service delivery model		Nick Cadd	Paul Coopey	30/09/2023	31/12/2023	On Target			
3.2	The Board will seek to support the service to innovate to improve service delivery		Nick Cadd	Paul Coopey	30/09/2023	31/12/2023	On Target			
3.3	The Board to receive an analysis report comparing the service to the good practice described in the Government's Disabled Facilities Guidance document.		Nick Cadd	Louise Powell	30/09/2023	31/12/2023	On Target			
<b>4</b>	<b>HR</b>									
4.1	To consider whether the team structure meets the current demands of the service		Jane Grant	Paul Coopey	30/07/2023	31/12/2023	On Target	Work will commence in earnest following the outcome of the S151 Officer report at Board on 3rd October regarding the potential access to further capital to use for personnel. If the S151 rejects our request for additional revenue funding we will review the existing structure to consider if any changes are required.		
4.2	To receive an annual report to provide assurance that the HR Protocol meets the requirements of the service and of partner authorities		Jane Grant	Paul Coopey	01/01/2024	31/03/2024	On Target	No update at this stage - on target		
<b>5</b>	<b>Finance</b>									
5.1	To receive September Quarterly Finance report & progress any actions		Jane Grant	Lesley King	01/07/2023	30/09/2023	On Target			
5.2	To receive December Quarterly finance report & progress any actions		Jane Grant	Lesley King	01/10/2023	31/12/2023	On Target			
5.3	To receive March Quarterly finance report & progress any actions		Jane Grant	Lesley King	01/01/2024	31/03/2024	On Target			
5.4	To receive June Quarterly finance report & progress any actions		Jane Grant	Lesley King	01/04/2024	30/06/2024	On Target			
5.5	Annual Budget to be set		Jane Grant	Lesley King	30/11/2023	31/01/2024	On Target			
5.6	To receive and consider internal audit reports of the service		Jane Grant	Lesley King	04/07/2023	30/09/2023	On Target			
<b>6</b>	<b>Reporting Requirements</b>									
6.1	To receive September Performance & Service reports & progress any actions		Nick Cadd	Paul Coopey	01/07/2023	30/09/2023	On Target			

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6.2	To receive December Performance and Service reports & progress any actions		Nick Cadd	Paul Coopey	01/10/2023	31/12/2023	On Target			
6.3	To receive March performance and service reports & progress any actions		Nick Cadd	Paul Coopey	01/01/2024	31/03/2024	On Target			
6.4	To receive June performance and service reports & progress any actions		Nick Cadd	Paul Coopey	01/04/2024	30/06/2024	On Target			
6.5	Annual Report to be received from HEART Service		Nick Cadd	Paul Coopey	01/05/2023	30/09/2023	At Risk		Paul to present Annual Report at the next meeting in October	
6.6	To find out & include comparative performance data in reports to Board		Nick Cadd	Paul Coopey	01/06/2023	01/09/2023	On Target			
<b>7 ICT</b>										
7.1	Updates received from ICT Project Team		Angela Coates	Paul Coopey	01/07/2023	30/12/2023	On Target			
7.2	Consider further developments of the case management software & hardware to support service		Angela Coates	Paul Coopey	01/07/2023	30/03/2024	On Target			
7.3	The potential requirements for interfaces between Civica CX and Mosaic require fully exploring and mapping		Pete Sidgwick	Paul Coopey	01/12/2023	31/03/2024	On Target			
<b>8 Customer Satisfaction &amp; Service Promotion</b>										
8.1	To receive reports from customer satisfaction surveys & act on findings		Michelle Dickson	Paul Coopey	04/07/2023	30/03/2024	On Target		Reports to be presented to the next Board in October	
8.2	Carry out analysis of referral sources and trends to ensure reporting for the BCF can be completed - links to reporting requirements		Michelle Dickson	Paul Coopey	01/12/2023	30/03/2024	On Target			
<b>9 Updating the Housing Assistance Policy</b>										
9.1	Revised Housing Assistance Policy to be agreed and adopted by partners		Angela Coates	Paul Coopey	30/09/2023	01/10/2023	On Target	Angela provided the agreement for sign off. Partners need to confirm whether they have completed their governance arrangements	Current status: North Warwickshire - Signed Off Nuneaton - Sign off expected July/August Stratford - Sign off expect late summer Warwick - Sign off expected September	
9.2	Review HAP to ensure its effectiveness & that budget provision supports implementation		Lisa Barker/ Paul Hughes	Paul Coopey	01/03/2024	30/07/2024	On Target			