

Project Reference / Number		HEART			Version & Date			10/01/2022	
Project Name		HEART Strategic Development Plan 2022-23			Version 1.0			TBC	
Project Description		Strategic Improvement Plan for the Home Environment Assessment and Response Team (HEART) Service 2022-23			June 2022				
Line No	Summary of Tasks	Linked actions	Board Owner	Operational Owner	Quantity		Completion Date	Current Update	
					Percentage %				
					Start Date	End Date			Action Status
1 Business Plan & Partnership Agreement review									
1.1	Annual review of HEART Business Plan		Angela Coates	Phil Richardson	01/04/2023	30/06/2023	On Target		New business case signed off by Board in May 2022. This action is to keep it under review.
2 Partnership Agreement									
2.1	Partnership Agreement to be reviewed to ensure it is fit for the future		Angela Coates	Phil Richardson	30/10/2022	01/02/2023	On Target		
2.2	Partnership Agreement terms to be agreed and the period for it approved		Angela Coates	Phil Richardson	01/11/2022	31/12/2022	On Target		
2.3	The Partnership Agreement is reviewed and updated to reflect partner priorities and requirements		Angela Coates	Phil Richardson	01/11/2022	31/12/2022	On Target		
2.4	The Updated Partnership Agreement to be approved by all Partners and signed		Angela Coates	Phil Richardson	01/01/2023	31/03/2023	On Target		
3 Service Delivery Model									
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		Angela Coates	Paul Coopey	01/12/2022	31/03/2023	On Target		
3.2	The Board will seek to support the service to innovate to improve service delivery				01/07/2022	30/06/2023	On Target		
4 HR									
4.1	To receive September Quarterly report from the HR Working Group & progress any actions		Jane Grant	Paul Coopey	01/07/2022	30/09/2022	On Target	Done	Verbal update at 8/09/22 Board meeting. Progress being made, some quick wins already eg WCC agreement re Part B of JDs re relate to HEART functions/WCC-Heart OT communication protocol to be developed/Greater autonomy for Heart
4.2	To receive December Quarterly report from the HR Working Group & progress any actions		Jane Grant	Paul Coopey	01/10/2022	31/12/2022	On Target		
4.3	To receive March Quarterly report from the HR Working Group & progress any actions		Jane Grant	Paul Coopey	01/01/2023	31/03/2023	On Target		
4.4	To receive June Quarterly report from the HR Working Group & progress any actions		Jane Grant	Paul Coopey	01/04/2023	30/06/2023	On Target		
4.50	To sign off a revised HR Protocol		Jane Grant	Paul Coopey	01/09/2022	31/03/2023	On Target		
5 Finance									
5.1	To receive September Quarterly Finance report & progress any actions		Jane Grant	Paul Coopey / Phil Richardson	01/07/2022	30/09/2022	On Target	Done	Reports submitted and agreed. Section 151 Officers are reviewing how capital monies can be used to support revenue staff costs.
5.2	To receive December Quarterly finance report & progress any actions		Jane Grant	Paul Coopey / Phil Richardson	01/10/2022	31/12/2022	On Target		
5.3	To receive March Quarterly finance report & progress any actions		Jane Grant	Paul Coopey / Phil Richardson	01/01/2023	31/03/2023	On Target		
5.4	To receive June Quarterly finance report & progress any actions		Jane Grant	Paul Coopey / Phil Richardson	01/04/2023	30/06/2023	On Target		
5.5	Annual Budget to be set		Jane Grant	Paul Coopey / Phil Richardson	01/01/2023	31/03/2023	On Target		
6 Reporting Requirements									
6.1	To receive September Performance & Service reports & progress any actions		Nick Cadd	Paul Coopey	01/07/2022	30/09/2022	On Target	Done	

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6.2	To receive December Performance and Service reports & progress any actions		Nick Cadd	Paul Coopey	01/10/2022	31/12/2022	On Target		
6.3	To receive March performance and service reports & progress any actions		Nick Cadd	Paul Coopey	01/01/2023	31/03/2023	On Target		
6.4	To receive June performance and service reports & progress any actions		Nick Cadd	Paul Coopey	01/04/2023	30/06/2023	On Target		
6.5	Annual Report to be received from HEART Service		Nick Cadd	Paul Coopey	01/05/2023	01/06/2023	On Target		
7 ICT									
7.1	Current position statement regarding the implementation of Civica CX to be provided		Angela Coates	Paul Coopey	01/07/2022	30/09/2022	On Target	Done	
7.2	Updated timetable for implementation to be provided		Angela Coates	Paul Coopey	01/07/2022	30/09/2022	On Target	Done	
7.3	The potential requirements for interfaces between Civica CX and Mosaic require fully exploring and mapping		Angela Coates	Paul Coopey	01/12/2022	31/03/2023	On Target		
7.4	Updates received from ICT Project Team		Angela Coates	Paul Coopey	01/07/2022	31/03/2023	On Target	Done	Anticipated Go Live for new system March 2023. Updates are given to the Board at its meetings.
8 Customer Satisfaction & Service Promotion									
8.1	Options for recording customer satisfaction be presented to Board for consideration and options around best practice explored		Michelle Dickson	Paul Coopey	01/12/2022	30/03/2023	On Target		Update to be given at the December Board meeting
8.2	Carry out analysis of referral sources and trends to ensure reporting for the BCF can be completed - links to reporting requirements	section 6	Michelle Dickson	Paul Coopey	01/12/2022	30/03/2023	On Target		Review source of information for this action.
9 Updating the Housing Assistance Policy									
9.1	Consideration of whether HAP should be amended & decision		Angela Coates	Paul Coopey	01/07/2022	30/09/2022	On Target	Done	
9.2	Revised Housing Assistance Policy to be drafted and adopted by partners		Angela Coates	Paul Coopey	30/09/2022	31/03/2023	On Target		The principles of a revised Housing Assistance Policy were considered by the Board at its September meeting. It was agreed that a revised policy would be considered in advance of the December Board meeting with a view to getting sign off by 31/03/2023

Project Reference / Number		HEART		Version & Date		10/01/2022			
Project Name		HEART HR Board Working Group		Version 1.0		TBC			
Project Description		HEART HR Working Group		June 2022					
Line No	Summary of Tasks	Linked actions	Board Owner	Operational Owner	Quantity		Completion Date	Current Update	Previous Updates
					Percentage %				
					Start Date	End Date	Action Status		
4	HR								
1	Protocol for arrangements for staff working in HEART to be reviewed		Jane Grant	Paul Coopey	01/07/2022	30/09/2022	On Target	Done	Some partners have seconded staff into the hosted service. Others staff are not seconded. The protocol seeks efficient working practices in managing all staff delivering the HEART services.
2	The revised joint protocol for human resources management to be drafted		Jane Grant	Paul Coopey	01/07/2022	01/01/2023	On Target	Done	A draft will be presentd to the Board at its December meeting
3	The joint protocol for human resources management to be reviewed & signed off by partners		Jane Grant	Paul Coopey	01/11/2022	30/03/2023	On Target		
4	Anomolies in terms and conditions are identified and brought with proposed solutions to Board by the working group		Jane Grant	Paul Coopey	01/11/2022	30/03/2023	On Target		To be included as part of the HR Protocol
5	Recruitment protocols are agreed with all partners and clearly articulated		Jane Grant	Paul Coopey	01/11/2022	30/03/2023	On Target	Done	Agreement in principle to adoption of NBBCs non contractual policies to be adopted by all LAs except WCC. This will be included in the HR Protocol
6	A protocol regarding requests for alterations to working hours to be agreed between the Host as 'manager' of the service and the employing authorities so that operational considerations are taken into account when requests are made.		Jane Grant	Paul Coopey	01/07/2022	31/12/2022	On Target	Done	Agreement in principle by all 6 LAs- to be included in the HR Protocol
7	Management capacity and the staffing structure of HEART is reviewed and a report brought to Board		Jane Grant	Paul Coopey	01/11/2022	30/03/2023	On Target		This is partly dependent on the review of capital and revenue available to the service by the Section 151 Officers
8	Complete a service structure review based on the needs of the service moving forward.		Jane Grant	Paul Coopey	01/02/2023	30/05/2023	On Target		