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## THE SOCIAL HOUSING COOPERATIVE MANAGER

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Lab for the construction of a Cooperative Service Level Agreement shared model

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In Italy, within the Social Housing Cooperative sector, the emerging housing model is strongly characterized by both the centrality of social management and the willing of starting-up collaborative communities.

The cooperative tradition, by its nature, is an important starting point for the structuring of this type of projects. The cooperative social housing and its management may represent a strategic development framework for social housing cooperative companies and an opportunity to **consolidate the national network, making it able to operate with a unique standard on the entire national territory**.

The specificity of the cooperative management is the ability to horizontally integrate the skills concerning **Property, Facility and Community Management** in a **single point of contact** for residents. The basic idea is that a cooperative management can ensure both the starting-up and the maintenance of the community in the long term period; this plus, beside representing an opportunity for the territory, becomes a **guarantee for investors, because on one side the real estate is well maintained and secondly performance targets can be achieved** through a strongly reduction of the payment arrears.

The cooperative housing sector has a well-established position within the integrated system of national Housing Funds; it promotes and manages a large number of initiatives.

Indeed, cooperative or promoted by cooperatives structures provide Social Housing management services in the framework of the Funds already operating in Lombardy, Piedmont, Tuscany, Parma, Friuli and other start-ups are taking place in Rome and Umbria.

For these reasons and in continuity with the initiative promoted by CDP (*Cassa Depositi e Prestiti*) entitled "SH-LAB Social Housing Laboratory, tools for Social Housing management", Legacoop Abitanti and FHS (Fondazione Housing Sociale) intend to undertake an in-depth study of the managing activities that aim to define a **shared protocol between social housing cooperatives** available to any subject wishing to operate in the management of social housing properties and to create the conditions **to deliver quality services in those areas where Housing Funds activities are already ongoing and currently not able to offer social housing management services properly structured**.

The SH-LAB project has encouraged the sharing of objectives between stakeholders and has highlighted the operational procedures to face up specific issues related to social management (e.g. payment arrears, community building). The cooperatives' proposal aims to take a step forward: **to promote an offer of social housing management services in areas where such offer is not currently adequately structured and / or operational** (Southern regions, Liguria, Emilia - Romagna, Rome, Umbria and others) and, at the same time, to examine all the issues relating to social housing management by **defining tasks, responsibilities and**

## procedures.

We should recognize that the specific conditions and the peculiarities of some local contexts imply to investigate for tailored solutions: nevertheless, taking into account the significant number of new residential constructions are going to be built in the framework of the FIA (*Fondo Investimenti per l'Abitare*, Investment Fund for Housing) in territories with little SH management experience, the definition and the adoption of uniform action models are essential, with a proper tuning according with different situations and with a precise monitoring of the obtained results. A **Service Level Agreement** will be defined that could allow also to smaller SH cooperative companies and to those ones that are located in areas lacking a tradition of SH management to be involved in the FIA system.

Hence, the project aims to:

- analyze and structure the work done so far on ongoing funds that involved different SH cooperatives companies in the management (*FIL; FASP; Housing Fund Toscano; Residences Social Housing Fund; ParmaSocialhouse; Social housing Cascina Merlata; Real Estate Fund CaGranda*);
- to reach a level of standardized quality, that, avoiding bureaucratic delays, reduces the uncertainty on the responsibilities of the different actors. This level of quality will provide an increase of the communication with tenants and will ensure the reduction of risk margins in profitability through the structuring of loyalty systems of the residents in rent;
- through the social management project, carry a sort of network incubator that involves all our cooperatives companies that need to be assisted in the management activities by promoting partnerships and forms of mentoring with more structured companies.

## Scope

**Define a Cooperative Service Level Agreement**, rising through a shared process and based on the management experiences of the Housing cooperative companies which already operate as Social Managers. The process will consist in sharing best practices, undertaking a critical analysis of the ongoing procedures and identifying improvements with the aim of **increasing the level of competitiveness of the social manager's model**.

## Outputs

**The Service Level Agreement (SLA)** document for Cooperative Housing companies representing procedures, economic and performance benchmarks related to all the functions:

- - Property Management
- - Facility Management
- - Community Management

## Actions

For each single function, **ongoing procedures will be examined** through horizontal comparisons with the assistance and the coordination of a Facilitator to point out critical aspects and to identify **proposals for improvement**, in order to define a new SLA model.

## Tools

- ✓ Comparative analysis of the main Social Management contracts;
- ✓ Detection and analysis in back - office of useful elements for the definition of the model;
- ✓ Report for each meeting and for the different functions, developed by the Coordinator and shared among the participants.

## Final Event

At the end of the Workshops, a Final Event will be scheduled for the presentation of the Cooperative S.L.A for Social Housing Management model to both institutional and financial stakeholders.

## PROGRAM

### **1st Workshop - Milan 14<sup>th</sup> February 2017**

Time: from 10.30 to 16.30

Draft agenda:

- Presentation of the Lab project and start of the Workshop  
*Rossana Zaccaria e Giordana Ferri*
- Presentation of the data collected and the analysis of the main experiences of Social Management  
*Fabio Bastianelli*
- Critical elements and proposals  
*Comments by participants coordinated by the facilitator*
- Examples and Report of an external social manager  
*Rossana Zaccaria + external speaker (to be confirmed)*
- Definition of the main points of work to be explored in the next thematic workshops
- Conclusions and drafting the summary document  
*Fondazione Housing Sociale*

### **2nd Workshop - Bologna 1<sup>st</sup> March 2017 : Facility Management**

Time: 10.30 – 16.30

Draft agenda:

- Presentation of the Lab project and start of the Workshop  
*Rossana Zaccaria and Giordana Ferri*
- Analysis of the main problems and definition of joint proposals on the issues:
  - Defining the Budget
  - Operational Procedures and relationships with Sgr (*Società Gestione Risparmi*)
  - Managing the complexity of the relationship with tenants, suppliers and Sgr
- Conclusions and drafting the summary document  
*Fondazione Housing Sociale*

### **3<sup>rd</sup> °Workshop - Bologna 15<sup>th</sup> March 2017 : Property Management**

Time: from 10.30 to 16.30

Draft agenda:

- Start of the Workshop, presentation and sharing of the Lab's purposes  
*Rossana Zaccaria e Giordana Ferri*
- Analysis of the main problems and definition of joint proposals on the issues:
  - Procedures for the selection of the tenants to be allocated
  - Procedures for contractualization
  - Management of the contractual relationship
  - Management of the payment delays
- Conclusions and drafting the summary document

*Fondazione Housing Sociale*

### **4<sup>th</sup> Workshop - Florence 29<sup>th</sup> March 2017 - Community Management**

Time: from 10.30 to 16.30

Draft agenda:

- Start of the Workshop, presentation and sharing of the Lab's purposes  
*Rossana Zaccaria e Giordana Ferri*
- Analysis of the main problems and definition of joint proposals on the issues:
  - Economic and contractual Rating
  - Procedures for assessment and social reporting
  - Budget definition
  - Implementation of the activities in the area
- Conclusions and drafting the summary document

*Fondazione Housing Sociale*

### **Final Event- 19<sup>th</sup> April 2017 Rome**

In conclusion, after the thematic workshops, a final event is scheduled in which the S.L.A. Cooperative for Social Housing Operations Management model will be presented to institutional and financial stakeholders.

The event will include two external contributions:

- the presentation of CDPI Sgr Business Plan (so called FIA 2, another Fund for housing)
- the presentation of the Research on Housing Demanding by Cresme (*Centro Ricerche Economiche e Sociali del Mercato dell'edilizia*)

Will be invited to join the event representatives of:

- SGR involved in the management of estate funds of the Social Housing
- Foundations, banks and Banca Etica
- Managers of Public residential Estate
- Institutions and Local Authorities (ANCI, Regions, etc.).
- Cooperation, Third Sector, Nonprofit associations
- European Projects and Social Housing Networks