



## 1. Document Control Information

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## 2. Purpose

This procedure outlines how Mara's Housing Co-operative Ltd will track and evaluate its progress toward key milestones and targets. It ensures we remain accountable to our business plan, responsive to challenges and able to adapt our strategy when necessary. The review process also includes space for reflecting on how well we are living our aims and values.

## 3. Scope

This procedure applies to all shareholding members of Mara's Housing Co-operative Ltd.

## 4. Content

### 4.1 Structure of Performance Review

It is divided into two distinct stages:

- **Before purchasing the property:** focused on building capacity, securing funding, and growing community engagement.
- **Once the property is purchased:** focused on managing the property, supporting the community space, and monitoring community engagement, sustainability, health and safety.



## 4.2. Review Process

### Stage 1: Before Purchasing the Property

Reviews in this stage will focus on the following areas of activity which will be assessed with quantitative and qualitative metrics.

Area of Activity	Quantitative Metrics	Qualitative Metrics
<b>Properties</b> What are we doing to find properties? Are we finding enough properties that are within our budget and have what we need?	Property prices (including change in price over time) No. of properties viewed No. of viable properties found	Relationships with potential sellers Suitability of properties
<b>Community Engagement</b> Are people invested in the project? Are we building a community that will work with us long-term?	No. of organisations we have specific support arrangements with No. of meetings with other organisations and individuals No. of community members	Relationships with organisations and individuals Feedback
<b>Reach</b> Are people hearing about us? Are we reaching the audiences we want to reach?	Social media statistics (no. of posts, followers, engagement rate etc.) Website statistics (no. of visitors, which pages are most visited etc.), no. of survey responses No. of printed materials No. of places printed materials distributed to	Feedback from individuals (e.g. 'where did you hear about us?') Feedback from organisations we are asking to distribute our outreach content and materials to their members
<b>Fundraising</b> Are we raising the funds we need to succeed? Where are our funds coming from and what are our most effective ways of acquiring funds?	Amount of money raised No. of grants applications, successful and unsuccessful No. of loanstock agreements No. of fundraising events and other activities Comparative effectiveness of different fundraising activities	Feedback from fundraising event attendees Feedback from grant funders and lenders we have applied to
<b>Viability</b> What do people think about us – are they confident we can succeed? Are our finances healthy? Is our financial forecast accurate?	No. of endorsements received from individuals and organisations Financial statistics (expenditure, income, whether costs of anything we've budgeted for is changing significantly etc.)	Feedback from organisations and individuals General economic conditions which may affect us
<b>Organisation</b> Are we making progress? Are milestones being met effectively and on time? Are we organising the project effectively?	No. of deadlines met or failed No. of meetings Meeting attendance	Feedback from shareholding members



Stage 2: Once the Property is Purchased

Reviews in this stage will focus on the following areas of activity which will be assessed with quantitative and qualitative metrics.

Area of Activity	Quantitative Metrics	Qualitative Metrics
<p><b>Finances</b> Does our income and expenditure match our financial forecast? <i>Fundraising will continue in this stage as in Stage 1; those metrics apply here.</i></p>	<p>Income Expenditure Forecast income/expenditure</p>	<p>General economic conditions which may affect us</p>
<p><b>Membership (Shareholding)</b> Do we need to recruit new members? Is living together harmonious? Are household tasks being completed?</p>	<p>No. of members compared to no. of rooms No. of members compared to no. of delegate positions and their distribution No. of expressions of interest in becoming a shareholding member</p>	<p>Feedback from shareholding members; outcomes of discussions on issues that have arisen and how they were resolved Information from shareholding members (e.g. 'I intend to move out in x no. of months').</p>
<p><b>Community</b> Are we achieving our aim of providing a space that promotes the growth of community groups in Aberdeen? Is the community engaged in the organisation of the space? Are we supporting groups in other ways? Are we part of and contributing to a network of progressive organisations?</p>	<p>No. of affiliated groups No. of community members No. of community member meetings No. of events hosted Amount of money disbursed to groups No. of organisations we have long-term arrangements with (e.g. workers' co-operatives who supply us with goods)</p>	<p>Feedback from community members Feedback from attendees who are not community members Relationships with other organisations Reputation</p>
<p><b>Engagement</b> What is our reach outside of our community? Are we reaching people who will come in and grow our community?</p>	<p><i>Same as Reach in Stage 1</i></p>	<p><i>Same as Reach in Stage 1</i></p>
<p><b>Property</b> Is the property being maintained well? Is it accessible?</p>	<p>No. of maintenance issues ongoing and resolved Measurements relevant to maintenance e.g. relative humidity of spaces Measurements relevant to accessibility e.g. width of doorways, incline of slopes</p>	<p>Feedback from members and community</p>
<p><b>Sustainability</b> Are we minimising our impact on the environment, local and global? Are we contributing to a healthier local environment? What can we do to improve our resource efficiency? Are our suppliers ethical?</p>	<p>Measurements relevant to sustainability e.g. energy and water usage, energy performance rating Biodiversity of green spaces (no. of species identified etc.) Soil quality (e.g. levels of contaminants)</p>	<p>Information about the supply chains of the products we use Results from external assessments</p>
<p><b>Compliance</b> Are we operating safely and in compliance with regulations and recommendations?</p>	<p>No. of risk assessments completed No. of health and safety incidents No. of compliance infractions No. of external inspections / assessments Measurements relevant to compliance e.g. air and water quality.</p>	<p>Health issues among members arising from poor conditions e.g. mould Results from external inspections / assessments</p>
<p><b>Organisation</b> <i>same as Stage 1</i></p>	<p><i>same as Stage 1</i></p>	<p><i>same as Stage 1</i></p>



### **4.3. Key Performance Indicators (KPIs)**

#### Stage 1

Our KPIs in stage 1 will be number of endorsements received from individuals and organisations, and amount of money raised. These reflect our priorities of building a community of supporters who are confident in our ability to benefit Aberdeen, and our fundamental requirement of raising enough funds to achieve our aims.

#### Stage 2

Our KPIs in stage 2 will be number of affiliated groups and income versus expenditure. Number of affiliated groups is an indicator that we offer useful services to our community, while income versus expenditure is fundamental to our ability to continue operating.

### **4.4. Fortnightly Meetings**

#### **Before purchasing the property**

These meetings will be held every two weeks, virtually or in person. They will be 1 hour to 2 hours maximum, focused on check-ins regarding ongoing work.

We will:

- Share updates on fundraising, socials, and events (such as fundraising events).
- Review upcoming deadlines and priorities.
- Identify any challenges and resource needs.
- Ensure alignment with our business plan and quarterly targets (milestones).
- Property assessments.

#### **Once the property is purchased, the review process will focus on:**

The fortnightly meetings will change to a monthly basis and will focus on:

- Community space use and upcoming activities.
- Member and community feedback.
- Co-living matters and well being.
- Property maintenance and infrastructure updates.
- Health & safety updates.
- Environmental performance.
- New Member Applications.



#### **4.5. Quarterly Performance Review**

Every quarter, all shareholding members will review progress against the Business Plan and Milestones Timeline.

We will:

- Assess milestone status (complete, in progress, delayed).
- Review key metrics relevant to the stage we are at.
- Compare fundraising and financial progress against that forecast in the Business Plan.
- Evaluate community engagement (events, feedback, reach).
- Identify issues and decide on corrective actions.
- Record key findings and next steps in a shared Review Log.

The members will provide short updates on their assigned areas detailing tasks in progress, obstructions, proposed changes. Discussion then will go around progress against KPIs and timelines.

Key findings and next steps are recorded in the Review Log.

#### **4.6. Annual Review**

The annual review will offer a strategic overview of the year's achievements and challenges identified before the Annual General Meeting (AGM).

##### Stage 1 (Before purchase)

- Community engagement (feedback, endorsements)
- Events held and attendance numbers
- Social media and website reach
- Funds raised from fundraising, donations, and loanstock
- Business Plan Updates

##### Stage 2 (After purchase)

- Property infrastructure issues and resolutions
- Property improvements
- Number of community events hosted
- Community feedback
- Level of engagement with external organisations
- Co-living experience and feedback from members
- Sustainability metrics (energy, waste, water)
- Health & Safety Metrics (incidents reports)
- Documents updates (procedures, policies, guidelines)
- Business Plan Updates



The outcome of the AGM will be the Annual Performance Review Report, this report will summarise:

- Achievements
- Issues and challenges
- Targets vs KPIs
- Adaptations/ Changes made
- Lessons learned
- Recommended actions for the following year

The report will be shared with all members and published for the wider community and funders.

## **6. Related Documents**

Business Plan  
Review Log

## **7. History of Change and Scheduled Reviews**

**END OF PROCEDURE**