

## SCRUTINY PANEL REPORT MARCH 2013: BREYER GROUP / B-LINE

### 1. INTRODUCTION

1.1 The Scrutiny Panel is a group of residents who meet to discuss the performance of specific areas of Newlon's activities. Currently it is looking at the responsive repairs contracts but it is hoped that it will widen its remit to consider other areas of Newlon's activities.

The aim of the group is to scrutinise the contractor's delivery of the service, and Newlon's management of the contract; to establish if it is effective and meeting the agreed standards. The Panel was provided in advance with an extensive range of materials to consider, covering job completion rates, the budget & spend and benchmarking information. From this they drew up an agenda of 16 questions. Three of the Panel members then attended the face-to-face meeting to discuss the delivery of the contract using this agenda.

1.1 The Panel members met with Neil Watts, Divisional Director, and Graham Shaw, Operational Manager, from Breyer and Duncan Lee, Assistant Director Customer Services for Newlon. The full notes from the meeting are attached as appendix A.

This report contains the Panel's recommendations and a rating of very satisfied; satisfied, neither / nor; concerned or very concerned for various areas of the service.

### 2. ASSESSMENT

#### 2.1 Area 1: Job completion statistics (i.e. within agreed timescales)

The Panel noted that Newlon officially do not have 14 day job categories, yet jobs are booked under this and are reported on in the statistics, and wanted this discrepancy looked at. Newlon confirmed this can no longer be used as an option for booking new jobs and, over time, jobs will no longer show up under this timescale.

**Recommendation:** That the 14 day job category be removed as an option.  
DONE.

The Panel's main concern was that completions within target times have declined, particularly in the 7 day and 28 day categories and are falling below targets. Explanations were sought as to causes, as were assurances that these were being addressed. Breyer stated they were confident that the issues were, in the main, related to the management of the new appointment booking system - Opti-Time, and not with the actual work.

#### **Panel's rating:**

Dissatisfied with the decline in job completion statistics compared with the previous period.

Satisfied with the proposed action and explanation of the cause of this decline.

#### 2.2 Area 2: Complaints

Complaints for Breyer have increased and are now the main source of formal complaints for Newlon. They often centre around missed appointments, delayed

completion of jobs, and confusion over appointment bookings. Panel asked for explanations and details of what was being done to improve the situation and how communication for appointments could be improved.

Breyer noted that the concerns reflected the issues discussed above about the management of bookings and that residents are not dissatisfied with the work done, rather the communication over the appointments and the jobs. They described how they are working with Newlon closely in the management of the complaints and re-iterated their commitment to improving the bookings process. They also noted the scale of work meant that complaints are in fact a very small proportion of the work completed. Breyer described how Opti-Time should improve the service, their increased management of Opti-time and how they call residents the day before their appointment to confirm it.

**Panel's rating:**

Dissatisfied with the increase in the number of complaints compared to the previous period.

Satisfied with the explanation and re-assurance of improvements

**Recommendation:** That the complaints statistics also show numbers as a percentage of the total amount of jobs issued.

**2.3 Area 3: QHS survey (all contractors)**

The Panel noted that the QHS survey highlighted the same concerns as other resident feedback – failed / missed appointments and poor communication over them. The common theme being that jobs are mostly attended and completed within one or two visits but if they become more complicated then communication breaks down and satisfaction drops. Breyer again related this back to their problems implementing Opti-Time and Duncan explained the process for agreeing variations on jobs. Questions were also raised over QHS' statistics.

**Panel's rating:**

Dissatisfied with the findings highlighted in the QHS survey.

Satisfied with the explanation and re-assurance of improvements

**Action:** Newlon to provide clarification over the QHS surveys' methods and results.

**2.4 Area 4: Newlon's repair satisfaction survey**

Newlon has amended the questionnaire so that if a resident has not had the repair completed at first visit the options for the reason given can no longer be 'something else', instead text can be recorded. The survey will in time be replaced by an automated survey that will also connect residents who had a problem or failed appointment back to the Service Centre ('Queue Buster').

**Action:** Newlon to liaise with Breyer over 'Queue Buster'.

**Panel's rating:**

Very satisfied

**Recommendation:**

To develop and present the themes that come out of the additional, qualitative information and include these themes as categories in the new, automated survey.

**2.5 Area 5: Breyer satisfaction survey**

Questions were raised about Breyer receiving higher results due to it being completed on site with the operative present. Breyer thought this less of an issue but were mindful of there being too many surveys overall. Breyer suggested there be a single, Newlon conducted, survey. Panel noted that they were hoping for residents' comments rather than statistics in this section from Breyer.

**Action:** Duncan to consider the suggestion from Breyer to have one satisfaction survey conducted by Newlon

**Action:** Breyer to see if residents' comments are collected in text responses

**Panel's rating:**

Dissatisfied with the on-site data collection. But, satisfied with Newlon's own survey.

**Recommendations:** That there is a cross over period where Breyer's onsite survey continues for a time until Newlon's automated system is in place and working.

**2.6 Area 6: Budget and spend**

The Panel and staff noted that in the budget the month to month variance was the same, in most lines, as the year to date variance. Questions were asked of the overspends in void works and discretionary repairs. Duncan gave details and explained the overspends are projected to be balanced out by underspends elsewhere in the budget by year end.

**Action:** The Finance Team to be asked for details as to how this sheet is calculated and explain the like for like nature of the variances for month to date and year to date.

**Panel's rating:**

Satisfied

**3. CONCLUSION**

The Panel in general were satisfied that Breyer and Newlon were working to address the concerns noted in their recent performance. Explanations seemed to satisfactorily cover both the causes of the difficulties and what was being done to improve them.

However performance has declined since the last Panel report, complaints have risen and resident feedback notes the same concerns around communication failures. The Panel expect the measures being taken to improve performance, complaints and communication.

**Appendix A:** notes from the Scrutiny Panel's meeting with Breyer and Newlon

**RESIDENTS' SCRUTINY PANEL**  
**Breyer Group** – day to day repairs contract  
13 February 2013

**Scrutiny Panel (SP):** Marion Frenz; Judith Rolle

**Breyer Group (BG):** Neil Watts, Divisional Director; Graham Shaw, Operations Manager

**Newlon Housing Trust (NHT):** Duncan Lee, Assistant Director Customer Services; Ewan Moar Senior Resident Involvement Officer.

**Introductions** were given and apologies for Panel Member Jacky Tong

**AREA 1 – Job completion statistics (i.e. within agreed timescales)**

**Q1:** If the '14 day' job category is not actually a Newlon timescale – could it be removed as an option?

NHT Yes, we can and have. Service Centre staff can no longer select it on our database as an option for a job. We can't remove it totally from the database as jobs have already been booked under this timescale but no jobs in the future be on a 14 day target.

**Recommendation:**

That the 14 day job category be removed as an option. DONE.

**Q2:** Can Breyer explain why the 'completion within targets' statistics have declined, particularly the main categories of 7 day and 28 day jobs; and what is being done to improve this?

BG Yes performance has dipped. Completions were at 96-98% level. We implemented a new diary management tool for job bookings called Opti-Time and the launch and management of it didn't go well, so from June the performance dipped as shown on the statistics. The figures have since improved for the current months.

Problems included the 'harmonisation' of the systems and the transfer of data; also a senior staff member went on maternity leave and her leadership skills were missed; this post is now being covered and there has been a marked improvement in the call centre.

SP: Is it purely to do with IT and not what is happening on site?

BG: Yes, quite confident. We are very much focussed on improving the daily bookings administration and the management of the new system.

The team used to be contract orientated and are now 'task specific' (please see explanation below in the response to Q5 in Area 2: Complaints).

Breyer has various contracts including Newlon, Southern Housing etc. The benefits of which are that staff could be shared over the contracts as

properties are often in the same area or even next door. So an operative could complete work for Newlon or Southern. Along with moving to the new job booking system, there was also a marked increase in work across all the contracts that needed to be managed at the call centre.

## **AREA 2 – Complaints**

**Q3:** Can Breyer give details as to why complaints have increased, how complaints are being handled and what can be done to reduce the number of complaints?

**Q4:** The themes of a lot of the complaints are similar – missed appointments, jobs delayed, confusion over bookings – is this to do with Opti-Time? How is this system being managed? How can the service be improved?

**BG:** The complaints are higher, but it would be useful to put these in comparison with the scale of work being done. Breyer completes the largest amount of repair work for Newlon so the number of complaints are in fact a very small percentage of the work completed.

**SP:** But Breyer is still the largest area of complaints and has increased.

**BG:** Yes it has and is mainly around missed appointments and the dissatisfaction arising from it caused by the problems described earlier. Tenants are satisfied with the actual work we do, but less so with the communication over jobs changing or moving. Breyer is very much focussing on this area of managing bookings and keeping appointments, as these are the key areas.

Breyer meets once a week with Annette Morrison (Quality Team Manager) to discuss live complaints, so are continually appraising open complaints, and challenging some that may be inappropriate.

Newlon is also giving Breyer increasing amounts of work that would have gone to smaller contractors, so this may also explain why there are more complaints.

**RECOMMENDATION:** That the complaints statistics also show numbers as a percentage of the total amount of jobs issued.

**Q5:** If offering a 2hr timeslot is not workable – could residents be called at the start of the day by the operative once they have the list of jobs for that morning or afternoon, to say Breyer will be attending and they are 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> on the list?

**BG:** The new job management system Opti-Time gives operatives one job at a time. They no longer get all their jobs for the day. Each job is sent to their PDA when the last one finishes. If a job goes over time, the next job or jobs are shuffled in the background and given to a different operative. As the job appears on their PDA the operative should accept the job then call the resident to say they are on their way. This should help reduce late or cancelled jobs.

**SP:** Does this always happen?

BG: Probably not 100%, but we are re-iterating the importance of this at the operatives' 'tool-box talks'.

SP: So you can't call ahead for the whole day?

BG: We now do this the day before. The call centre looks at the jobs booked for the next day and each is called to confirm.

The live diary management of Opti-Time is now monitored and managed through the day by a specific member of staff.

Jobs being issued one by one should help improve attendance and the operative calling each job as they are received should help improve communication.

### **AREA 3 – QHS independent survey, all contractors**

SP: We found that these were the common themes between the different resident feedback – failed appointments, missed appointments and communication over it.

BG: Opti-Time was implemented in June or July and the information and statistics covers this period when there were problems with the implementation and management of it, so yes complaints and feedback are reflective of this.

The method of calculating the percentages in the QHS statistics were questioned as they include respondents who had ticked that the question did not apply to them; and also in the veracity of the first questions' figures which has a total of 229 responses whereas the second question has 626.

**Action:** Newlon to provide clarification over the QHS surveys' methods and results.

**Q6:** Generally Newlon and the contractors seem to get things right first time and do a good job when they do. However, if the repair needs to be re-booked, extended or parts ordered it then seems to cause problems and communication starts to become an issue. Is this to do with Newlon, the contractor (Breyer in this case) or both and what can be done to improve this?

BG: Breyer. The operative should do this on site with the resident, there and then using the PDA. Breyer is working to ensure that this happens on every occasion. Breyer also check the previous days' jobs and if it hasn't been done then questions are asked of the operative and call centre staff, who have to explain why it wasn't. Breyer are getting hard-line with staff over these issues and will use disciplinary measures to ensure that this improves.

**Q7:** When a job is bigger than expected and needs more time or will cost more, how is this managed between Breyer and Newlon and the resident? How

quickly are these turned around?

NHT: Duncan explained the process:

If the job is bigger or more complicated than first thought the operative on site is able to increase the cost of job (vary it) up to a maximum of £250. They do not need to get an agreement for this and the invoices are checked once they come in against the work done.

In some circumstances where the cost is higher than £250 but there is a quick and easy solution, then the operative can call and have it agreed on the phone. For instance a job needs a new toilet to be fitted and they have one on the van, or are very close to a supplier and can get the job completed that day – they can get an agreement over the phone to go ahead.

Lastly, where the job is much more costly and cannot be attended to that day, the operative puts in a 'variation order' to Breyer setting out the work needed and the cost. Breyer is expected to forward this to Newlon within 48hrs. On receiving this, Newlon calls the resident to say it has been received by us and we will agree or reject it within 48hrs). If the work is agreed then Breyer is called at the same time as the resident to say yes Newlon approves this work and to arrange an appointment there and then with the resident.

SP: So it is Newlon's responsibility to contact the resident?

NHT: Yes Newlon does.

SP: So does the operative explain this on site to the resident too?

BG: Yes they should. Breyer is working hard to ensure this process works and Opti-time does help with this, however Breyer is also working hard on getting things right first time.

#### **AREA 4 – Newlon's repairs satisfaction survey**

**Q8:** Can Newlon explain the way the questions are asked as the results seem confusing, possibly contradictory, between Q3, 4 and 5?

NHT: Residents are called if they have had a repair appointment in the last few days (whether or not it has been attended to previously). Everyone is asked Question 3 and 4. Those who say 'yes my work was completed at this appointment' go on to question 5 then 6. Those that say 'no it wasn't' miss 5 and go straight to 6.

So in the results for Question 5 – for 89.4% of those people who said that their repair was completed at that appointment this was their first and only appointment needed (i.e. 89.4 % right first time); 8% needed two visits; 1.1% three and 1.6% more than three.

**Q9:** As seen before, the biggest category in 'reason given for work not being completed' is 'something else'. During the survey, can the details of what these actually are be typed into a text box to see what the issues are or more tick box options be added?

**NHT:** This has been done – ticking 'something else' now leads to a text box where the call centre staff have to add a reason.

However this survey will be replaced in the future by the planned automated system. This will use a recorded voice asking simple questions needing a yes / no response. If a no response is heard for 'was the appointment kept' the resident is automatically put through to our service centre to see what happened and ensure a new appointment has been booked. This will also happen if the resident answers 'no' to the question 'and was the work completed'.

This system is called 'Queue Buster'. In this way residents with problem repairs will be linked back in with the Service Centre much more quickly and numbers helped will be much larger as the automated system can call many more residents than the Service Centre staff can reach.

**BG:** Neil asked that Breyer be included in development discussions over the data that is used to prompt the survey call i.e. the job appointment data or the job completion data.

**ACTION:** Newlon to liaise with Breyer over automated survey and 'Queue Buster' system.

**Q10:** Newlon's survey highlights the same issues as QHS and complaints – that generally Newlon and Breyer, in this case, do a good job at first attempt but if we don't get it right first time the service is not so good and communication breaks down. What can be done to improve this?

What is the process for letting people know that an appointment is going to be missed and how are jobs booked in and diaries managed through the day – for instance when an operative goes off sick?

**Q11:** Who takes the responsibility for letting residents know a job has been cancelled – Newlon or Breyer?

**BG:** Yes the performance figures are unacceptable and we are working hard to improve them as described in the previous questions and answers. We don't want to be going backwards and are dedicated to bringing it around; hopefully the latest statistics will show this.

In terms of sickness and losing an operative, there are various ways that we cover this: we have some temporary labour and sub-contractors able to fill in and some trades have some built in capacity to cope – with 80% capacity booked in a day and 20% not - so has a certain amount of 'floating' room for emergencies and sickness.



Breyer manage this and notify the tenant.

## **AREA 5 – Breyer satisfaction survey**

**Q12:** The 'appointment kept' results are notably higher than in Newlon's survey – is this because the survey is completed on-site by the operative on a PDA as this would not cover the views of those whose appointment had been missed that day

**Q14:** The survey doesn't ask how many appointments it took to complete the repair, just: was the repair completed 'on the day of the appointment'. Do Breyer themselves monitor repeat visits or does this come through from Newlon?

**BG:** Yes the survey is completed on site on the PDA.

**SP:** Does this not introduce a bias by the way the survey is completed – ie in front of the operative?

**BG:** We have thought of that and realise that it could be felt that pressure is brought to bear by doing it in the presence of the operative. However, the PDA is given to the resident, they complete it privately and once it is completed it is not visible to the operative on the screen when handed back. So we don't think it does lead to bias.

**SP:** Possibly, but not entirely convinced – a telephone survey would be better.

**BG:** We do this as well and the results seem to be similar so maybe 'coercion' isn't as high as you might think...

**SP:** So you do have alternative data?

**BG:** Yes but we should look at survey overload, duplication and annoying the resident, we may want to reduce this to one survey call done by Newlon?

**Action:** Duncan to consider the offer from Breyer to have one satisfaction survey conducted by Newlon.

**Recommendation:** Panel recommended that there is a cross over period where the onsite survey continues for a time until the new automated system is in place and working.

**SP:** Do Breyer need their own survey for their own internal use?

**NHT:** Duncan would supply all data to them anyway for their own performance monitoring.

BG: Breyer also do post repair inspections on a percentage of jobs and sometimes during work in progress

SP: To what extent?

BG: Aim is for 20% but gaining access is an issue as people are happy to stay in for the repair but less so for a follow up visit.

NHT: Newlon do this too and also check work completed against the invoices too before paying.

**Q14:** The Scrutiny Panel were hoping that for this section Breyer could supply some qualitative feedback from residents from complaints and surveys – i.e. what residents actually said – rather than statistics. Is this recorded?

BG: The survey is essentially a yes / no response, but we could see if there is anything collectable from texts received

**Action:** Breyer to see if residents' comments are collected in text responses.

## **AREA 6 – Budget and spend**

**Q15:** Can Newlon explain why in the lines for both Voids and for Aids and Adaptations, that the variance for month to date is the same amount as the variance for year to date?

NHT: The lines do seem to add up and these are not the only ones – many of them are mirrored.

**Action:** Finance Team to be asked for details as to how this sheet is calculated and explain the like for like nature of the variances for month to date and year to date.

**Q16:** What caused the large overspend of £48,086 in voids work and the £23,412 in discretionary repairs. What are discretionary repairs?

NHT: With Voids the budget is set at before the year starts but you will never know exactly how many empty properties you'll get in a year. Also the budget set by Finance for Voids is quite low, whilst the budget for Void Capital works was set quite high. The Void Capital works will be underspent and this should balance out the overspend in the routine Void work. It would be preferable that the budget is set more realistically at the beginning though.

Overall the Maintenance spend for the year is on course to be within budget.

'Discretionary Repairs' should not have been used as a term in the budget. They are in fact 'non-responsive repairs'. These are repairs that are higher in cost than a day-to day repair and possibly more complex, but are not capital

costs – such as a new roof. An example of a non-responsive repair could be the replacing of a concrete path to a property.

This is a new line for this budget and may not have been set at the right level in the first place meaning an over-spend was likely from the start. However, this too is likely to be balanced in the end by an under-spend elsewhere.

The Panel thanked Breyer for their time and effort.

**NEXT STEPS**

A report will be written that will be seen by the Residents' Services Committee and the Residents' Forum; with any recommendations and actions arising to be considered by the Committee Members.