



**Tenant Scrutiny Panel
Report on Responsive repairs &
Customer Services**

February 2016

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Appendix 1 - <http://www.nwleics.gov.uk/pages/repairs>

Appendix 2 – Questionnaire used for customer services operatives

Appendix 3 – Repairs spreadsheet

Appendix 4 – The Learning Cycle

1. Acknowledgements

The Tenant Scrutiny Panel (TSP) gratefully acknowledges the support, guidance and assistance provided by the members of the Customer Services Team headed by Kerry Wright, the Scheduling and Repairs Team (Neil Barks, Jon Coulton and Frances Crossley and Lisa Tabberer), The Resident Involvement team – Justin O'Brien, Susan Ross, Diane Caffrey, Lesley Kelly – as well as Tracy Ashe, David Moxon, Steve Everson, Mark Tuff, Chris Lambert and Roger Bayliss. Thanks also to Glyn Jones for attending the TSP meetings to encourage and support the tenant scrutiny function.

2. Executive Summary

The TSP made the decision to inspect responsive repairs because of the importance of this service to NWLDC tenants. It seemed logical to choose the function performed by front line staff as the topic for this inspection, especially in view of the fact that NWLDC had just introduced a new repairs scheduling system (Oneserve) which had been customised to allow it to also be used by customer services officers.

From the investigations of the TSP it became apparent that the perspective of the customer service officers was that Oneserve was not working particularly well at that level. The reasons for this were identified as the failure of NWLDC to adequately communicate their plans for this change to the people it would most affect. It is the view of the TSP that Oneserve was introduced without adequate consideration to project planning, change management and communication of the introduction of Oneserve and what appears to be an almost total lack of training for customer services staff.

This left officers doing their best to cope with one totally new system whilst also being expected to use OpenHousing, the system previously used. In particular, those officers who were solely engaged in taking responsive repairs calls using OpenHousing found themselves out of their depth and comfort zone. The TSP would suggest that more thought is given to the roll out of any future changes/introductions of IT systems to front line staff.

From discussions the TSP had with the scheduling team it was apparent that they were very enthusiastic about Oneserve, and had an in-depth knowledge and had received adequate training. The functionality suited their requirements. However it was also apparent that the customer services officers found that the system lacked the functionality they required for their role, for example the lack of a diagnostic tool or diary functions. The customer services officers are also unable to book appointments for all customers at the initial point of contact. This has an adverse impact on the ability of customer services to effectively carry out

their role and also has a negative impact on customers' views of the service they receive.

It is the view of the TSP the relationship between the scheduling team and the customers services team needs to be improved to ensure a quality service is provided to tenants and maintained.

From the observations of the TSP during this inspection it was obvious that NWLDC did not have a consistent interpretation of the term first time fix. The TSP believes this will have skewed reporting of performance indicators.

3. Strengths:

- 3.1. The TSP consists of a group of volunteers who are also tenants of NWLDC, each of whom has different skill sets and seeks to improve their skills and value to the group by identifying development needs and attending relevant training.
- 3.2. Each TSP member knows the importance of adopting a flexible attitude and displays a high level of commitment to their voluntary involvement in working with NWLDC to improve Housing services to tenants and streamline processes.
- 3.3. The TSP mission is to be a "critical friend" to the Council, facilitating service improvements for Council tenants.
- 3.4. The TSP uses differing methodologies to analyse data, collect evidence, report on outcomes and make recommendations to NWLDC to enable changes and improvements to be implemented.

4. Vision and Strategy:

- 4.1 The responsive repairs service area is one of the largest functions within the housing portfolio and is the one area which most tenants are likely to use at some point during their tenancy. This led the TSP to decide on responsive repairs as the over-arching topic. However, knowing that this is also the area which generates most frustration and debate the TSP felt that the first stage of contact in the Call Centre should form the basis of our inspection.
- 4.2 As tenants and TSP members we have heard many reports of poor service with regard to responsive repairs, with stories of poor quality repairs, wrong tradesman attending, multiple visits (maybe because no stock of parts required), failing components etc. This ultimately damages the reputation of NWLDC through the perception of tenants that the service is unreliable, inept and poor quality.
- 4.3 Our strategy at this point was to meet with the relevant managers within customer services, scheduling and responsive repairs to seek engagement and support in identifying the relevant policies and procedures at the point of first contact and arrange to gather information and 'shadow' council officers working in the call centre and scheduling functions.

5. REPORT

The TSP has reported on its findings as factually as possible and without any bias and our inspection has, on occasion, identified that some of our original concerns were already being addressed. However our findings and subsequent recommendations have led us to be constructively critical of the way NWLDC has managed the introduction/implementation of change with regard to Oneserve.

6. CHOICE OF TOPIC

- 6.1. The TSP recognised that repairs was the overarching topic that affected every tenant at some point during their tenancy, with responsive repairs the one item that was most likely to cause complaints and negative feedback. This was an area that the TSP had always planned to inspect knowing that it is probably the most prominent service provided by the housing department.
- 6.2. Having made the decision to inspect the responsive repairs service the TSP then had to choose one component part of that service for its report and, after consideration, the TSP felt that the direct link to the tenant provided via customer services – where a new Scheduling package called Oneserve had just been introduced – was ideal.

7. METHODOLOGY

- 7.1 Reviewed all relevant NWLDC policy documents provided in respect of repairs, focusing on where responsive repairs fits into the overall process (appendix 1).
- 7.2 Work shadowing with customer services officers, maintenance officers and the scheduling team.
- 7.3 Met with Jon Coulton and Francis Crossley to look at how Oneserve works as a scheduling tool and the existing relationship between customer services and scheduling
- 7.4 Attended repairs working groups to outline the TSP planned inspection and to ask working group members to advise the TSP of anything they felt may be relevant to the inspection.
- 7.5 Attended a TSP workshop to identify and agree priorities for inspection.
- 7.6 Met with customer services team leader Kerry Wright, and agreed a questionnaire (Appendix 2) to be used in customer services staff interviews to gain inside knowledge of the system and the views of the users.
- 7.7 Interviewed customer services staff using agreed questionnaire (Appendix 2) to get their views in relation to Oneserve and their suggestions for improvement.
- 7.8 Met with David Moxon, Process and Systems Enhancement (PASE) project manager.
- 7.9 Attended training specific to the topic.
- 7.10 Scheduled TSP working meetings as required.
- 7.11 Visited another housing provider (One Vision Housing (OVH), Merseyside) who also use Oneserve. During the visit we observed an excellent relationship between their customer services and scheduling teams. OVH has approximately 13k properties.
- 7.12 Attended a workshop with Housing Quality Network (HQN) as part of a value for money review of the repairs service
- 7.13 Reviewed the training delivered as part of the implementation process for Oneserve and the assessment of training to gauge if it met the needs of the recipients.
- 7.14 Reviewed repairs carried out over a six month period to determine how many were 'First Time Fixes' and how many involved more than one call to provide a percentage of each (Appendix 3). NWLDC appears to have more than one definition relating to whether a job was fixed at the first visit, hence the TSP decided to use the HouseMark definition of 'Completed at the first visit' to avoid any confusion.

The HouseMark definition of this is as follows:

Percentage of repairs completed at the first visit

Rationale

This indicator allows landlords to understand how efficiently and effectively they are diagnosing repair problems and planning for their rectification.

Definition

This is the number of repairs completed by the operative without the need to return a second time because the repair was inaccurately diagnosed and / or the operative did not fix the problem, as a percentage of all responsive repairs completed (emergency, urgent and routine combined).

A repair is considered fixed at first visit when the operative has attended the property, identified, diagnosed and remedied the fault (using van stock), and carried out any making good before then leaving the property.

Multiple trades: Where the job requires multiple trades who may follow on from each other, then the work would still be considered completed at first visit so long as each of the trades were completed in one visit.

Replacement parts: If the job required specific replacement parts and the operative needed to return a second time with the correct parts because they were not part of his/her van stock, then this would not count as completed at first visit.

No access: Where the operative is unable to gain access to the property, this will not be counted as a visit and should be excluded from the figures.

Worked example

Where there were 90 repairs completed at first visit out of a total of 100 repairs completed within the period.

*Percentage of repairs completed at first visit = $(90 / 100) * 100 = 90\%$*

8. Aims of the Exercise

To improve knowledge of Oneserve as a customer services tool for the reporting of repairs and to examine the interaction between customer services and scheduling. The primary aim was to identify areas that could be improved and to make recommendations that would benefit both tenants and NWLDC

9. Findings:

A new computer system for scheduling repairs had recently been installed, called Oneserve. After working through the inspection process the TSP identified the following findings:

- 9.1 Oneserve was introduced for scheduling purposes in September 2014 but did not go live with customer services until March 2015.
- 9.2 Scheduling of the implementation of Oneserve to customer services officers did not provide sufficient time and/or training to bring them up to speed on the system prior to going live.
- 9.3 Customer services officers were required to use Oneserve alongside the existing housing management system, OpenHousing
- 9.4 Some customer services officers were finding it difficult to get to grips with Oneserve. This was particularly the case for operatives with extensive experience of using OpenHousing, the system previously used to report and schedule responsive repairs.
- 9.5 Some of the options available to Customer services officers on OpenHousing were not available on Oneserve (i.e. diary facility and diagnostic tool) and it was not possible to migrate information from one system to the other.

- 9.6 From shadowing customer services officers the TSP also picked up on the fact that they had difficulty in tracking repairs previously reported, the history of which they were required to access via OpenHousing. This was time consuming and the information was not easy to find and often involved customer services officers emailing schedulers for the information required to progress the tenant enquiry. This in turn meant telling the tenant they would ring back once they had the necessary information. This is frustrating for both parties and makes NWLDC look unprofessional. The TSP also observed there was often a poor record of the history of tenant contact in relation to previous reports.
- 9.7 The TSP observed that the level of cooperation and communication between the scheduling team and the customer services team appears at times to be at a basic level and lacks a degree of understanding of each other's roles and priorities.
- 9.8 From work shadowing the TSP also observed tenants were often quick to complain that they had been waiting for a while for a progress report. They felt it was not good enough that when they rang to chase progress NWLDC couldn't give them a straight answer to their question about a particular outstanding repair. This caused further frustration for both customer and customer services officers.
- 9.9 From the experience of shadowing calls to customer services officers by TSP members, although customers often complained about the service and delays, few instances were reported formally. It seems likely that few tenants realise they have to initiate the NWLDC formal complaints procedure before their adverse feedback becomes a formal, recordable complaint.
- 9.10 Our questioning revealed that training on Oneserve for customer services officers had been very hit and miss, with no formal classroom training by a professional trainer with relevant supporting information.
- 9.11 No training records were kept, either by customer services or by Human Resources in relation to the implementation of Oneserve.
- 9.12 Customer services staff are able to book urgent (7 days) appointments but are unable to book emergency (24 hours) or routine (28 days) appointments.
- 9.13 When visiting another housing provider - One Vision Housing (OVH) in Liverpool – where we shadowed their call centre staff, we found that:
- I. Staff using the system had been trained by an expert presenting the Oneserve system in a suitable training environment using a PowerPoint presentation and screen shots with copies of all handouts provided for reference.
 - II. OVH also assessed whether this training had met the needs of each individual staff member and further training arranged where necessary.
 - III. In the event that any staff member was seen to be forwarding unnecessary queries to scheduling, this would be reported back the customer services supervisor and again, additional training would be arranged if necessary.
 - IV. In the event of any system changes, every user received re-training accordingly.
 - V. Comprehensive up to date training records are kept for all employees of the organisation.
 - VI. Staff members in the customer services department had the ability to make all repairs appointments at the first point of customer contact.
- 9.14 NWLDC lacks consistency in its use of the term 'First Time Fix' and it is the panel's view that this may be erroneously enhancing performance indicators that are being reported.
- 9.15 Consultation with the PASE team confirmed that some of the above points were already on the radar and steps being taken to improve matters.

Recommendations:

1. As a result of the poor scheduling for implementation of Oneserve to customer service operatives the TSP recommends that NWLDC adapt its policies in relation to delivering change and project management to include tailoring delivery of training for staff at all levels.
2. That through the PASE project NWLDC add the appropriate functions to Oneserve to enable the customer services officers to become more efficient, these include the diary function and diagnostic tool M3 Locator Plus.
3. The TSP recommends that NWLDC reviews the process for booking of all responsive repairs appointments with a view to customer services officers being able to book emergency, urgent and routine appointments directly with the customer, providing appointments at the initial point of contact.
4. The TSP recommends that, in order to provide a more efficient and effective front line repairs services to tenants, there needs to be in place a single dedicated team combining both customer services officers who are already well versed in repairs and schedulers; the new team should then be responsible to Housing. This would build a better relationship between those working in the two repairs related functions and, together with the suggested functional enhancements to Oneserve, lead to an improved and more efficient service to NWLDC tenants and lead to a 'no blame' culture.
5. A thorough analysis of current training needs be carried out for all customer services repairs and scheduling officers in the new team and arrangements made for relevant professional training (particularly on Oneserve) to be delivered, possibly with some team building, be delivered as part of that change.
6. The TSP strongly recommends that NWLDC, through Human Resources, ensures that proper training records for every member of staff are raised and updated each time training is attended, using an appropriate 'learning cycle' (Appendix 4) as the basis for delivery of adequate and relevant training. Using this system NWLDC would have a clear vision of the experience, skills and knowledge of every officer in their employment. This would enable a skills matrix to be maintained for each employee to assist with recruitment when looking at internal vacancies and possible management trainees etc. In addition the aspirations, aims and objectives of employees will also be managed to the benefit of the organisation. NWLDC may also want to consider the appointment of a dedicated training officer within the HR department
7. NWLDC should adopt the HouseMark definition of 'Completed at first visit' for the purpose of performance reporting and stop using any other definitions to remove any confusion in respect of performance results. In addition NWLDC should review all repairs KPI's to reflect Housemark definitions and closely monitor how this affects performance results.
8. The complaints process and procedure should be widely promoted to tenants via all appropriate mediums, including details of accountability and NWLDC tenant compensation scheme

Janet Higgins, Chair, On behalf of the Tenant Scrutiny Panel

NWLDC/TSP/2015 Reports/Repairs – Responsive repairs Report