



## REVIEW OF Repairs

<b>Objective:</b>	To look at ways of improving communication between Morrison, Rosebery Housing Association and Customers
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<b>Indicators</b>	<ul style="list-style-type: none"> <li>(i) To increase communication between Morrison and Rosebery Housing Association</li> <li>(ii) To increase communication between Morrison and Customers</li> <li>(iii) Make recommendations to improve communication</li> </ul>
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<b>Recommendations To Rosebery Executive team.</b>	See attached appendix 1 for snapshot of recommendations. More detailed analysis is contained within the report
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<b>Context</b>	<p>This is the second report conducted by the Residents Panel.</p> <p><u>Choosing a topic</u></p> <p>When deciding upon the first review, the Panel looked at the Key Performance Information (KPI), satisfaction and benchmarking data. Customers had indicated that communication was very important to them for 3 key service areas (repairs, quality of home and value for money). As communication covered a large area, it was decided when choosing the initial report that this would be broken down and that we would look at communication between RHA and Morrison in our second report.</p> <p>Satisfaction levels are on the increase when it comes to the quality of repairs; however there is evidence of a decline when it comes to appointments being kept and communication between Customers and Morrison.</p> <p><u>Survey Information</u></p> <p>From the rated by customers service, we noted that the satisfaction levels for making repairs appointments had dropped to 82% in March 2012. Although we are pleased to note that this rose to 85% by May 2012 and hope that this improvement continues.</p> <p>We are concerned that satisfaction surveys are only offered by operatives 63% of the time when a repair has been completed. When we enquired about this, one of the reasons given was the use of sub contractors. We were keen to investigate this use as part of this review to see if the level of service and communication was maintained with their use.</p>
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	The Status Survey 2010 shows that satisfaction levels with our repair service were 77%. However, when looking at the rated by customers repair survey year to date, we are running at 89%. The overall satisfaction level for Rosebery's service was 88%. This indicates that completing a repair in somebody's home is an opportunity for us to raise overall satisfaction levels with Rosebery services.
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<b>Methods &amp; Documents</b>	<p>In this review a variety of methods were used to test the objective. The following methods were used to ensure all areas were covered.</p> <ul style="list-style-type: none"> <li>➤ Desk top review to familiarise with Morrison' policies, procedures and standards. <ul style="list-style-type: none"> <li>○ Key Performance Indicators/Reports</li> <li>○ Appendix 3 of the contract between Rosebery and Morrison (agreed terms)</li> <li>○ Gap Analysis report</li> <li>○ Complaints and Compliments from Morrison between April 2011 to date</li> <li>○ Survey information from December 2011 to February 2012</li> <li>○ Voluntas statistics (Rated by Residents)</li> </ul> </li> <li>➤ After the desk top review had been carried out, the desk top highlighted key areas for further exploration and questioning <ul style="list-style-type: none"> <li>○ Interviews with Morrison Operatives</li> <li>○ Interviews with Morrison Management</li> <li>○ Interviews with RHA Neighbourhood Officers</li> <li>○ Interviews with Asset Management</li> <li>○ Appointment tracking</li> <li>○ Mystery Shopping</li> </ul> </li> </ul>
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<b>Findings</b>	<p>This section includes the findings of what the panel found whilst carrying out their investigations.</p> <p>The recommendations from the findings can be found in the next section. (Appendix 1 details a snapshot of recommendations).</p> <p><b>Gap Analysis Report/ Agreed Terms</b></p> <p>When examining the Gap Analysis, the Panel also had to look at agreed terms in the contract at the same time. What was of concern to the Panel was the number of discrepancies that were itemised in the Gap Analysis Report. The panel asked a number of questions regarding this. As a result there are a number of areas relating to this report that the panel are not satisfied have been addressed. These are:</p> <ul style="list-style-type: none"> <li>❖ Complying with fundamental KPI's, which has led to Morrison not delivering on key target results in service.</li> <li>❖ Responsive repairs will be directly delivered and not provided by specialists. More repairs are being completed by sub-contractors due to a shortage of operatives employed by Morrison.</li> </ul>
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- ❖ There must be a robust system for the distribution, collection, monitoring and importing of user satisfaction – Statistics of levels of satisfaction of Customers differs between the information Morrison provided and that of Voluntas.
- ❖ Morrison will establish which method of obtaining satisfaction information is preferred by Customers – There is no clear mechanism for collection and opportunities for capturing feedback. Customers are offered to complete a satisfaction questionnaire by the Operatives PDA but due to increasing problems with lack of PDA usage this information is not captured. Customers are not being offered paper feedback forms; they have to ask for them. However, looking at the Voluntas figures at November 2011 only 46.9% of customers were asked to complete the survey but as at May 2012 this had increased to 50%.
- ❖ Correspondence should be issued to the Customer once the appointment is made. Morrison have not provided evidence to demonstrate that this correspondence is issued.
- ❖ Morrison working hours are Monday to Friday 8.00am to 5.00pm and Saturdays 8.00am to 12.00pm – Speaking with Customers, none were aware you could obtain an appointment on Saturday and these were not offered at the point of making an initial appointment. Morrison have not provided evidence showing they offer Saturday appointments.
- ❖ Morrison will send a reminder of priority 2 and 3 appointments to the Customer by text message and/or telephone calls the date before the appointment date. Looking at the Voluntas figures at November 2011 only 55.8% of customers received correspondence/text messages and in February 2012 it was only 52.4%.
- ❖ The operative should be telephoning the customer at least 15 minutes before the estimate time of arrival to notify them that they are on their way. Morrison has not provided evidence to demonstrate that this happens.
- ❖ Morrison must notify the Customer at least 24 hours in advance when an appointment cannot be honoured. The general theme of complaints made to Rosebery regarding Morrison is appointments not being kept. On occasions compensation was offered by RHA but not the amount specified within the 'agreed terms' which states that Morrison would pay £25 for missed appointments as a result of Morrison failure. RHA compensation procedure offers £10 for missed appointments.
- ❖ Morrison must ensure that there are sufficient staff at all times within working hours to ensure that operatives and surveyors can contact them to make appointments whilst still with Customers.
- ❖ An IT requirement is that there is a management of appointments with Customers to include resource scheduling, broken, missed, rescheduled and no access. This information is

not being regularly provided to RHA. Without this information being provided regularly, RHA and Morrison will not be able to see whether the IT system in place is working effectively.

- ❖ An IT requirement is that the time taken to complete a job is recorded. It is unclear whether this is being recorded.
- ❖ Within 12 months of contract start, Morrison committed to look at ways to improve customer relations with various technical solutions such as text messaging re booked appointment reminders etc. As Voluntas suggest the use of text messages has declined it is unclear what Morrison have done to improve this.
- ❖ A formal core group meeting will take place on a monthly basis for the duration of the term. This does not always take place due to work loads and both organisations need to commit to this to ensure problems are resolved
- ❖ Morrison will deal with complaints received in a prompt, courteous manner in accordance with RHA's complaints procedure. Morrison have not provided evidence of any minor complaints logged.
- ❖ Morrison have indicated there is a 100% overall satisfaction whereas Voluntas statistics show this is at 91.3% a difference of 8.7%. On this basis it appears that Morrison are painting a better picture of customer satisfaction than is born out by the Voluntas figures.
- ❖ Complaints logged to RHA, Morrison must provide a response within 5 working days of being asked to do so, and they must also pay compensation due at their own expense. RHA have confirmed they pay all compensation. Out of the complaints made to RHA all of them were about appointments not being kept and lack of communication.
- ❖ Operate incentivised schemes to ensure higher levels of questionnaire return. eg. Free entry into a monthly £50 draw or a prize draw – No Panel members are aware this takes place.
- ❖ Morrison are to make available the following appointment times with Customers:
  - AM: from 8.00am to 12.30pm
  - AM: outside of school dropping off time
  - PM: from 1.00pm to 5.00pm
  - PM: outside of school picking up time
  - Saturday – 8.00am to 12.00pm

### **Complaints/Compliments**

From RHAs complaints log all of the complaints made about Morrison were in relation to numerous missed appointments and more communication. What is unfortunate is that Morrison have not kept a log of complaints made direct to them however minor they may be.

By not collecting minor or informal complaints Morrison are missing the opportunity to highlight trends in service failure or success. RHA have therefore also not incorporated these complaints through their own complaint logging and are unable to understand where services could be improved.

There have however, been a number of compliments received about Morrison operatives. This highlights that repairs are a very important service and when this service works well it reflects well on RHA.

### **Interviews with Operatives, Management of Morrison Neighbourhood Officers of RHA and Asset Management**

#### Operatives

Jobs are placed on an electronic PDA system using priority codes. These are listed from urgent to least important.

With regard to time allocated for each job and whether this is appropriate, an operative felt that most of the time problems arise with more complex jobs. These take up more time and can result in delays getting to the next Customer. However it is not always possible to gauge how long a job will take until you get access to the Customer's property.

With regard to the PDA's provided, the operatives believe that they are fantastic. Paper surveys can be used but my preference is using a PDA. *'The only issue I have with PDA's is when using these devices in areas with a poor signal'*. One of the operatives interviewed was aware that some Customers do not like the PDA system and try to facilitate by offering a paper document. *'I am more than happy to post a Customer feedback form on request'*.

The operatives are regularly kept informed and feel Morrison communicate well with RHA and vice versa.

However communications at Morrison could be further improved by having regular staff/management meetings.

Due to problems recruiting drainage and plumbing staff, these jobs are often sub contracted out. We need more qualified plumbers but are being told the current labour market makes this very hard to achieve.

The operative indicated that they liked the family feel to working for Morrison on the RHA contract. *"I value my colleagues and it really is a team effort. It is easy to call in extra help if required"*.

#### Morrison Management (MM)

MM are aware there were some problems with regard to communication such as the sending of text messages, not offering Saturday appointments, setting up of Core Groups with Customers and follow up letters not always being sent. However they did not realise the extent of it.

They rely on information about customer satisfaction through the feedback forms on operative PDA's. MM were aware that one operative

had not offered Customers the opportunity to complete the feedback. However, they have advised that this issue had since been addressed.

When complaints were made to Morrison they would seek to deal with this directly so that it can be resolved as quickly as possible. If the issue was not resolved then the matter was referred to RHA.

The strengths of Morrison are that labour is local and it is a local service.

However, as there were not enough in-house operatives, more work was being sub-contracted. As sub-contractors were used, Customers were not given an opportunity to feedback and Morrison did not have much control over appointments and timings. Dealing with sub-contractors caused delays and there is lost time in chasing them to deal with defects. This obviously frustrated Customers as clear appointments times could not be given to them.

Their performance is measured by the KPI targets and is reported every month to ensure they are not slipping behind and an investigation is done if any serious issues are identified. In examining the Gap Analysis Report this is not being undertaken regularly.

When asked what they believe could improve service. MM believed the registering process for logging of jobs was cumbersome. The front office system was not user friendly. They believed a better system would speed up and smooth out the process and the IT needs to be improved. Staffing levels also contribute to difficulties. MM believes a junior administrative assistant would make a huge difference especially if one member of the team is off sick because this can have a huge impact on the efficiency of the department.

However, as it is a small team it does have its advantages. MM have team briefs every month which allows them to do regular job reviews and appraisals with staff so that they have an opportunity to provide feed back of any issues or concerns. They are aware that there needs to be more communication with RHA and have regular, wider discussions between the two teams. This would create an opportunity to share frustrations and find positive ways forward.

Communication with Asset Management seems to work well but MM believe that RHA seem to be a little frustrated that they have to be so involved and that perhaps Morrison should just get on with it. This needs to be addressed as both Morrison and Asset Management should be able to feel comfortable in order to work together to improve communication and services to the Customer.

#### Asset Management

The general feeling is that RHA and Morrison work hard as a partnership and there is a wealth of experience to draw upon.

The general consensus was that the interfaces needed to be improved. Morrison and RHA have separate IT systems and these need to work more efficiently. This has been discussed with Morrison. Much more work needs to be done with the Morrison' IT system to allow better and more up to date flow of information between the two organisations.

Looking at the differences in roles between the surveyors at Morrison and that at RHA it needed to be established how well the surveyors work together in terms of diagnosing problems. The RHA Surveyor has a wealth of experience and works well with the surveyor at Morrison. The RHA Surveyor visits Customers at their properties on a daily basis. He works hard to achieve solutions to Customer problems and is in regular contact with his counterpart at Morrison. However it was noted that the Surveyor at Morrison did not always record the information so other staff from Morrison, were not aware of what was happening/had happened.

Morrison and RHA need to work together as a team to prevent customers being caught between Morrison and Rosebery. On the whole this partnership works well and he is not aware of any significant issues that cause customers distress. Good communications is the key to success in this area. It was stressed that the Asset Management Team try hard to take ownership of problems as they arise and see to it that a satisfactory outcome is achieved for the Customer.

The Asset Management Team are aware that a large number of sub-contractors are being used by Morrison. However he went on to say that this is not necessarily a bad thing as it is usually more cost effective for Morrison to use sub-contractors and this approach often drives up quality which is obviously beneficial to Rosebery's customers. In contrast sometimes the same degree of quality work is not achieved when Morrison use their own staff.

With regard to the Gap Analysis Report, Asset Management stated that Morrison are required to evidence how they propose to deal with these problems. Priority codes are allocated to these items. Further clarification is sometimes required and Morrison have agreed to provide clear timelines to RHA in order to remedy items highlighted in the gap analysis report. A consistent approach is needed and much more work needs to be done.

### **Mystery Shopping**

A mystery shopping exercise was conducted by a member of the panel to test Morrison's response to a repair. During this exercise it was explained that the appointment needed was outside of the time when children would be collected from school. This was not very well received and Morrison were not very flexible with the appointment times. It was also noted that the customer asked for a Saturday appointment but was told that Saturday appointments were not an option.

A later call was made to Morrison the following day to reconfirm the appointment time as being outside of school pick-up hours. However, on the day of the appointment a call was made to the customer during school hours to ask if they could attend earlier than what had been agreed.

<p><b>Recommendations</b></p>	<p>Based on the findings, the panel have made recommendations to the Executive team at Rosebery to improve communication between Morrison, Rosebery Housing Association and Customers. Appendix 1 also provides a snapshot of these recommendations.</p> <p><b>Gap Analysis Report</b></p> <p>Looking at the gap analysis and through our interviews with staff members, we are aware that there should be a lot more communication between Morrison and RHA Customers. Morrison need to ensure that this is happening both when confirming appointments, communicating cancellations and when attending customer’s homes.</p> <p>Morrison need to ensure all appointments are reiterated by either text, letter or email to the customer. We want to know that appointment making is communicated as well as possible and that when this fails, this is communicated to the customer in the best possible way. Alternatives must be explored with the customer which need to include Saturday morning appointments.</p> <p>The variety of different appointment times that are available should be made more transparent to customers. We currently do not test to see if customers are offered a range of appointment times. A new questions needs to be added to the Voluntas Rated By Customers Survey to find out if this happens.</p> <p>It is clear that more communication could also take place internally between RHA and Morrison. This should include regular meetings between both customer service teams, both management teams and Asset management.</p> <p><b>Complaints/Compliments</b></p> <p>Morrison and RHA need to introduce a system or spread sheet to capture minor complaints. This will include failed appointments and examples of poor communication around appointment times. Morrison must provide this information to RHA on a six monthly basis.</p> <p>With today’s technology there can be no reason for poor communication resulting in missed appointments.</p> <p><b>Interviews</b></p> <p><u>Operatives</u></p> <p>In our conversations with staff it became apparent that there are some problems that need to be addressed with the use of subcontractors. Subcontractors should be made to sign up to a clear code of conduct, which should be monitored heavily and be aware of what will happen if these standards are not met. Although we are aware that the use of subcontractors is necessary at times, we want to be sure that their use is kept to a minimum and that they are the best subcontractors that Morrison can get.</p>
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Some internal operatives felt that Subcontractors are often given the more sought after jobs rather than them being distributed to internal operatives. This could be seen to affect moral amongst Morrison's own internal operatives. A report needs to be pulled to demonstrate how jobs are assigned between internal operatives and subcontractors.

Staff also expressed concern about the various systems that are used and how these systems do not communicate well together. RHA and Morrison need to find a way to ensure that RHA staff can keep up to date with the progress of a job without having to refer to Morrison staff.

#### Morrison Management (MM)

Analysis should be conducted to work out if the use of subcontractors results in longer repair completion times. This will be reported back to the customer panel on an on going basis. We also want regular KPI packs.

Morrison and RHA must coordinate regular meetings between both Customer Service teams to improve communication between the two. This should also be expanded to include regular meetings with Asset management so that communication levels can be improved further.

Subcontractors that are used on a regular basis should be issued PDA's so that they are capable of capturing satisfaction feedback at point of service. All subcontractors should also be issued with paper surveys that can be used as an alternative when necessary.

RHA to explore with Morrison taking on an administrative assistant to give them some resilience and to help them through some of their administration backlog. They would also be able to cover the phones when short staffed.

#### Asset Management

Core group meetings between Morrison and Rosebery must happen every month. There have been occasions where this has not happened in the past due to staff being unavailable. These meetings should also be opened out to customers

Currently, compensation for missed appointments is not automatic. Although the amount could be reduced from £25, it should be made an automatic system and should not be reliant on customers making a claim. This money is currently claimed from Rosebery rather than being sent by Morrison automatically once a month to all missed appointments. Morrison should now resume responsibility of paying all future compensation going forward and advise RHA of all payments made.

#### Neighbourhood team

The neighbourhood officers mentioned the introduction of See My Data, and thought that it might be possible to keep customers up to date with repairs using this system.

Neighbourhood officers should be able to communicate directly with the people undertaking the work, rather than having to go through Morrison Customer Service team. This would remove an unnecessary layer of

	<p>communication; reduce errors and the need for further appointments.</p> <p><b>Mystery Shopping</b></p> <p>It is clear from the Mystery shopping exercise that improvements need to be made when it comes to the flexibility of appointment times. We need to be sure that a variety of appointment times are offered, and that this includes Saturday appointments. Where appointment times are agreed, every effort should be made to meet the agreed time. In the event that an appointment cannot be kept, this should be clearly communicated and an alternative agreed.</p>
<p><b>Conclusion</b></p>	<p>We have seen a similar trend with this report and our last report. The main theme that has been highlighted is a lack in communication and not managing resident's expectations which is key to their sense of satisfaction.</p> <p>There is a lot of good work to commend about the repairs service and it is clear from the customer feedback that many people appreciate the skills and professionalism of Morrison operatives. However, it appears that where Morrison fall down, it is with basics principles such as keeping promises. If an appointment is made it needs to be stuck to. If this can not be done, or there is a problem then the resident needs to be kept fully informed at all times. When compensation is due, it should be paid by Morrison as per their contract.</p> <p>The use of subcontractors has been give as a reason for a lot of the issues we have seen. However, Residents will not see the distinction between subcontractors and Morrison's own operatives; as far as the resident is concerned, the subcontractor is Morrison/RHA and when they under perform or communicate poorly it reflects badly on both organisations. Morrison must work at holding subcontractors to account and must take responsibility for things when they go wrong. They should also make an effort to employ permanent staff where possible so that the use of subcontractors is limited.</p>

## **APPENDIX 1**

### Appointments

- (i) Morrison to evidence that appointments are regularly confirmed in writing.
- (ii) Morrison to evidence that Saturday appointments are offered and under what circumstances. They need to also evidence how this is promoted to customers.
- (iii) RHA to add a new Voluntas question to see whether customers are offered a range of appointment times.
- (iv) Morrison to evidence that their operatives are contacting customers 15mins prior to appointments.
- (v) Morrison to evidence that text messages are being sent to confirm appointment times.
- (vi) RHA to Suggest to Morrison that they employ an Administrative Assistant to give them some resilience and help them get through some of their admin backlogs.

### Satisfaction Feedback / Complaint Information

- (i) Morrison to establish what customers preferred method of collating satisfaction information is.
- (ii) Morrison to look at ways to increase the use of satisfaction surveys through the PDA system. This should include considering whether PDA systems can be issued to regularly used Sub Contractor.
- (iii) Paper survey's should be kept by both Morrison operatives and subcontractors, and should be offered as an alternative to the PDA when necessary.
- (iv) Morrison to commit to improving record keeping of complaints and outcomes. This information should be provided to RHA biannually.

### Compensation

- (i) RHA and Morrison to clarify the compensation process for missed appointments. This should be an automatic process.
- (ii) Morrison to commit to making compensation payments for missed appointments going forward.
- (iii) Morrison will commit to making a compensation payment for missed appointments dating back to January 2012.

### Subcontractors

- (i) Morrison to ensure that subcontractors are made to sign a clear code of conduct to ensure satisfaction standards are met
- (ii) Morrison to produce a report to demonstrate what type work is carried out by Subcontractors and what work is carried out by internal operatives.
- (iii) Morrison to assess whether the use of subcontractors negatively affects repair times.

### Internal Communication

- (i) Regular meetings to be scheduled between both Morrison and RHA's Customer Service Teams
- (ii) A commitment needs to be made to ensure Monthly Core Groups are held and that feedback from these is acted upon. Customers should also be able to attend these meetings.
- (iii) Morrison and RHA to commit to improving internal IT systems to ensure that both systems communicate together.
- (iv) Morrison to allow neighbourhood officers to have direct communication channels with operatives.