
BHA Scrutiny Panel Report – Repairs Service

Prepared August 2015 and presented to Jean Gray, Operations Director.

Introduction

The Scrutiny Panel felt as part of their ongoing review of communications the Repairs Service would be a key area to be looked at to establish if any improvements or recommendations could be made. However it was agreed by the panel that in order to fully understand the system a better understanding of the general procedure for the reporting of a repair through to the completion was needed.

The panel agreed to concentrate on the main communication area between the tenants and staff, which would be the first contact with the association via phone when reporting a repair.

Methodology used.

The Panel split into three groups. Over a one week period each group then sat for the morning with one of the three Technical Assistants (TAs). This would enable to panel to have first-hand experience of the process from initial reporting through to raising the works order then completion. Each group made observations. Unfortunately only two calls were taken during the shadowing exercises.

The full group then met with David Gray, Assistant Technical Services Manager and Carrie Warnock, Senior Technical Assistant and interviewed them about the processes and procedures and addressed any questions rising from the shadowing exercise.

At this meeting David Gray advised that on average repairs receive 22 calls per day, split between the 3 TAs. It was agreed that in order to assist the panel with their review of the service it would be an advantage to listen to some recorded calls made to the Association from Tenants reporting repairs. This was subsequently arranged and random selections of four recorded repair calls for each TA were listened to at a separate meeting attended only by the Scrutiny Panel.

The group agreed that for each call they would listen for the following main points

1. Are all three Technical Assistants following a consistent approach?
2. How are the contractors chosen?
3. Was an appointment offered to suit the tenant?
4. Anything else which stood out as the calls progressed.

Complaints

The Panel are aware that there are no outstanding complaints relating to repairs staff or the service.

It was confirmed that the procedure followed is if any issues come to the attention of the Senior Technical Assistant who then sends an email to the Technical Assistant with the following questions together with a recording of the call.

1. What was handled / communicated well?
2. What was handled poorly/communicated poorly?
3. What would you change in your approach if you could?
4. Any additional info you want to add?

The TA is then allowed to comment. If actions are deemed to be needed then this is addressed through training or competency through PDP's.

The Scrutiny Panel understand that this procedure has been used in the past and the outcomes were satisfactory. Each individual case is assessed on its own merit and the outcomes logged accordingly.

Training of Technical Assistants

The TAs are trained on the systems and procedures by BHA Super User staff who have an in depth knowledge of both. The diagnostic software, KEYFAX, this then prompts questions to ask in compliance with BHA Policy and guidelines.

At the shadowing sessions the TA's were asked what they felt could be done to improve their role. One of the comments made was to have refresher training not only on the system but perhaps in key areas such as plumbing, electrical diagnosis. See comments below in Finding and recommendations.

Acknowledgements

The Panel would like to thank all the Repairs staff involved for their time and to thank the Board and Management Team for their continued support of the scrutiny process.

We acknowledge that the Repairs team continue to regularly hit their in house target times and continue to provide a high level of service to BHA tenants, at times in difficult and challenging situations. From a tenants point of view the panel wish to pass on their admiration for the Technical Assistants as they appreciate that they may get little, if no praise from tenants.

They also wish to thank David Gray and Carrie Warnock for attending a planning meeting and discussing in detail the repair procedures and the roles within the team.

We look forward to hearing responses to the findings and recommendations and a positive programme to address any identified shortcomings.

Findings and Recommendations – Main Points as listed.

These are based on the limited time spent shadowing the Technical Assistants and the telephone calls dip sampled.

Point No.	Area	Scrutiny Findings/ Recommendation	Management Team Response	Scrutiny Panel Response
1	Are all three Technical Assistants following consistent approach?	<p>We acknowledge that these are three individuals each with varying levels of experience and understanding of the system. Although the policy and procedures appear to be adhered to in their methodology, their personal approach, based solely on the samples of calls listened to differ.</p> <p>Key points being: Some of the sampled calls appeared rushed and the TA talked over the caller rather than listening. This gave the impression of the TA not using the diagnostic tool and pre-empting the repair.</p> <p>Throughout the sample calls it was unclear if the diagnostic</p>	<p>AGREE – some issues will be monitored through their PDP.</p> <p>We have agreed further system training for OMFAX which is the diagnostic tool available for use by the staff.</p> <p>6 calls will be monitored per week by Senior Technical Assistant (2 per Tech Asst). Report will go to Ops Committee quarterly and Colin Dumma will feedback to Tenant Volunteers</p>	Agree with comments and actions proposed.

		<p>tool was being used. Only one call had breaks in the conversation followed by a relevant question thus giving the indication the tool was being used correctly.</p> <p>TA in one of the sampled calls was confrontational which the panel feel may have contributed to the overall difficulty with the call. Most of the calls however were handled with politeness and understanding.</p> <p>Recommendation – Ongoing monitoring to determine if any further staff training needed to ensure a consistent approach.</p>		
2	How are the contractors chosen?	<p>Nothing in the calls listened to or the shadowing exercises enabled the panel to establish how the contractors are selected or if the workload is distributed evenly.</p> <p>Recommendation – The panel feel that this internal</p>	<p>AGREE – The Senior Technical Assistant has now reviewed this process and monitors weekly. Emails are now sent out to the whole Tech Team weekly identifying which contractors are getting what work.</p> <p>Tech Assts have been</p>	Satisfied that the processes have been reviewed and will be monitored.

		<p>procedure should be reviewed and monitored regularly as they were unable to clarify this point. We understand that regular quarterly contractors meetings are held which give the opportunity for any concerns to be addressed.</p>	<p>reminded to go through the whole appt system whilst on phone and allocate the Contractor to the job to enable the tenant to be made aware who their contractor will be</p>	
3	<p>Was an appointment offered to suit the tenant?</p>	<p>Callers were given the option of appointments. It was evident that the TAs were consulting with contractors diaries on the system and advising of when the contractor could call. At no point were the tenants advised of which contractor would call. Only “an electrician” or “the plumber” will call.</p> <p><u>Recommendation</u> - The panel feel it would be good practice to state the name of the contractor who would attend, to reassure the tenant and offer a security measure.</p>	<p>AGREE – if call taken to conclusion on system then tenant would be advised who contractor will be. However some works do not go through the diagnostic tool e.g. cleaning/replacement gutters.</p> <p>Software update required for OMFAX to review SORs and resolve some scripting issues – HIGH PRIORITY</p>	<p>Agree with comments and actions.</p>

4	Anything else which stood out as the calls progressed.	<p><u>Vulnerable Tenants</u> A small number of the calls heard were clearly from vulnerable tenants.</p> <p><u>Recommendation</u> - If there is anything on the repairs system that would highlight to the TA that the caller was vulnerable or had a specific issue then it would be good practice to use this. Refresher training for staff could look at this as a topic to be included and how to identify and respond to vulnerable tenants.</p>	<p>Active H system being updated to include CRM snapshot in October 2015. This will flag all vulnerable clients on our system.</p> <p>All staff currently undertaking Customer Care refresher training</p>	
4.1	No ownership of call backs	<p>A small number of the sampled calls related to tenants having to call back for updates/further information following periods of no contact.</p> <p><u>Recommendation</u> - that systems are looked at to improve or ensure that call backs are done and information relayed to tenants. Thus reducing the</p>	Raised through refresher training – ownership and responsibility of calls	Satisfied that ongoing training and processes will monitor this.

		need for tenants to ring in asking for updates. More efficient use of staff time.		
4.2	Concern re communication between outside contractors and BHA staff.	Some calls highlighted the tenants knowing of faults that were not shown on the repairs log for staff to see. These faults specifically related to Dalex and Edison. <u>Recommendation</u> –an internal review of how information from external contractors is relayed via BHA systems and then to tenants.	AGREE – will review feedback with specific contractors to ensure clarity and correct information available.	Agree with comments and actions.
4.3	Hand Held Devices	The Scrutiny Panel fully support the suggestion of Hand Held Devices for Technical Staff. This has obvious benefits in the swift responses to queries and would enable works orders to be raised swiftly and ultimately support the timescale and procedures.	NOTED	Satisfied that this suggestion will be considered.
4.4	The £30 missed appointment charge	In the calls sampled this was not explained at any point.	AGREE – this is an area	Satisfied that this area is to

		<p>Only during one conversation did this occur and that was a tenant stating the charge when in dispute with the TA.</p> <p><u>Recommendation</u> - The group feel that the missed appointment charge should be explained when the appointment is made ensuring the tenant is fully aware of the charge should there be an issue.</p>	<p>which is now being reviewed. Some staff are not good at taking this forward.</p>	<p>be reviewed and monitored.</p>
4.5	Ongoing refresher training	<p>The group appreciate that it may be difficult to establish the exact problem when speaking to a tenant over the phone. Although the 3 TAs demonstrated a good understanding of the system they use we feel that ongoing training and perhaps specific questions relating to certain trades would be a useful tool for them.</p> <p>The TAs should also continue to liaise with the TOs and STO for further advice.</p> <p>This point was raised by one</p>	<p>AGREE – use OMFAX then would go through the process systematically.</p> <p>Arranged refresher training and this will then be conducted annually to ensure consistency and understanding.</p>	<p>Agree with comments and actions</p>

		TA.		
4.6	DANGER tab in the diagnostic tool	<p>Is there an option to create this tool relating to any issue raised for Gas, Electric or Water ?</p> <p>Perhaps a series of key questions to ascertain the urgency and give immediate advice to the caller.</p> <p>Emergency advice is given in both the Tenancy Agreement and Tenant Handbooks however these are highly likely not to be at hand when calling.</p>	<p>Already in system - OMFAX</p> <p>There is a repairs handbook which will be an addition to the tenant handbook but will provide more detailed information</p>	Satisfied that this suggestion will be considered and reviewed.

Further points for consideration/recommendation –

The panel appreciate that it is difficult to establish continuity and judge each call equally as all relate to different circumstances.

The points raised above are based solely on observations made from the random calls pulled from the system. The shadowing exercise was inconclusive as only two calls were taken at these points so limited observations could be made in relation to the diagnostic tool or selection of contractors.

The panel would request that following the completion of this exercise and any subsequent recommendations or changes are implemented, that periodically 2 calls are pulled from each Technical Assistant on a quarterly basis and there be an ongoing review by the Scrutiny Panel. If Management are in agreement to do this then the panel would be happy to add to their agenda for future meetings/ exercises. –

Management and Technical Team Suggestions –

UTILISE OPS COMMITTEE & TENANT VOLUNTEER MEETINGS
STANDARD RESPONSIVE ANSWER TO CALLS REQUIRED FOR BHA

The Scrutiny Panel would like to pass on their thanks to MT for their consideration and swift response to all the points above and agree with the teams suggestions above,

