

# **Orion Programme**

## **Summary report on Peer Review for Gas Servicing**

16 June 2010

## The process

- 1 The peer review for Gas Servicing (carried out simultaneously with Disabled Adaptations) is the second carried out in Sovereign Group. The staff selected to form the team included a Lead from Housing Management, and three staff who currently work in Gas Servicing within the Associations. Training on inspection techniques was delivered to both staff and residents by an external consultant.
- 2 The process of peer reviewing is:
  - Form the team and provide training
  - Provide documents relating to the service (including performance information, policies, procedures, complaints, etc.) to all team members
  - Team reviews documentation, then meets to discuss the focus for the review at each Association
  - Team divides into sub-teams to carry out site visits to each Association
  - Whole team reconvenes to discuss findings and agree recommendations
  - Report produced for managers and the Group Residents Forum
  - Associations deliver service improvements in line with recommendations.
- 3 All staff contacted during the process of this review proved welcoming, helpful and accommodating, and the review team would like to express their thanks to those staff for allowing them to carry out their activities efficiently and unhindered.

## Best practice - highlights

The following are examples of best practice, as determined by the peer review team:

At the time of carrying out the gas servicing, engineers will give residents advice on energy efficiency and help with how to use their heating systems and controls. **Sovereign Vale**

All staff in the department attain the City & Guilds 6176 Energy Awareness qualification. **Sovereign Vale**

Legal costs are significantly reduced by using Resident Services staff to carry out this work. **Sovereign Twynham**

'Gas awareness' seminars are held for residents. **Sovereign South+West**

A specific system for quality audits includes a process for taking corrective action on identified issues, and provides an audit trail to ensure works are progressed and completed to a high standard. **Sovereign South+West**

Measures are now put in place to reduce the servicing cycle for residents who repeatedly enter the 'no access' procedure, to help prevent this reoccurring. **Sovereign South+West**

The 'Home Health and Safety Check' provides a good, efficient service to residents and value for money. **Sovereign Kingfisher**

The team gives out alert notices to all staff in the Association on residents who are currently in the 'no access' procedure. **Sovereign Kingfisher**

The British Gas 'Here to Help' scheme is utilised, which gives residents information on energy efficiency, plus any related benefits or grants they may be entitled to. **Sovereign Kingfisher**

The service to leaseholders is incentivised with a discount for future gas services. **Sovereign Kingfisher**

# Executive Summary

## Sovereign Vale (East Hanney)

- 4 The service provided by the Vale team is of a good quality. Staff show dedication, high levels of customer care and good knowledge, and routinely achieve performance targets, with the exception of internal audits which are not monitored robustly. Closer working between the two teams providing the service in the Association could improve delivery, especially with regard to information management. Beyond this, there is evidence that there are good links with other teams. All staff in the department are enrolled on the City & Guilds 6176 Energy Awareness course, which shows a commitment to improving knowledge and delivering a good service to residents.
- 5 The policy for the service is not in a resident-friendly format. The integral procedure lacks a flowchart with timescales and responsibilities, does not detail the entire process, and fails to match the supporting management spreadsheet.
- 6 Residents indicate that their experience of gas servicing was very positive. A post-works survey is issued to all, however there are questions over its timeliness and whether the results are analysed and communicated to staff appropriately. Although the information on the website is poor, details on gas servicing are included in the residents' handbook. Gas safety is promoted via the regular Association newsletters and information leaflets. The appointment system is flexible and offers residents good choice, although the first appointment is automatically allocated and staff do not call ahead to confirm or remind residents. It is planned to offer a text-ahead service in future.
- 7 The Association works on a twelve-month schedule for gas servicing. Each job ticket informs engineers if the resident has a specific need or vulnerability, and Vale will provide adapted heating controls for disabled or partially-sighted residents. Whilst carrying out the gas service, engineers give residents help on using their heating systems, along with advice on energy efficiency. Of a sample of Landlord's Gas Safety Certificates, one third showed that no visual inspection had been carried out on residents' gas appliances, but this may be a recording error made by engineers, or due to the fact that residents did not have gas appliances to test. Faults with heating systems are reported by engineers and orders for repairs made quickly. The service has been extended to leaseholders, and Vale are currently trialling systems using alternative energy sources in a small number of properties.
- 8 Logs are not kept on why residents fail to keep appointments, with no measures in place to work with those who have or are likely to go into the 'no access' process more than once. If staff from other teams find that a resident currently in 'no access' is at home, they will contact the servicing team and Vale will send out an engineer, usually within four hours, to complete the gas service. The Association has taken the decision not to move to a shorter servicing cycle as this would incur additional cost without making a sufficiently great improvement to performance.

## 9 Strengths

- Flexible appointment system
- Engineers give residents advice on energy efficiency and how to use their heating system
- Adapted heating controls fitted for those residents with a need

- Good promotion of gas safety and servicing
- High levels of customer satisfaction and customer care from knowledgeable and dedicated staff
- All staff attend an energy awareness course
- Engineers are provided with information on residents' needs and vulnerabilities
- Service available to leaseholders
- Repairs noted at time of servicing are logged and processed quickly
- Trialling a range of alternative energy sources
- Respond quickly to feedback from other teams when residents in the 'no access' procedure are available in the property.

## **10 Areas for improvement**

- Lack of information on gas safety and servicing on the website
- Poor version control of policy
- Procedure does not specify clear responsibilities and does not cover entire process
- Post-works survey is generic, may not be timely, and there is no evidence that the results are appropriately analysed for the service
- Monitoring spreadsheets are unclear and open to potential error
- Targets for quality audits are not being achieved
- Engineers may not be consistently carrying out visual inspections of other gas appliances
- No work in place to address issues with residents who repeatedly enter the 'no access' process.

## **Sovereign Twynham (Christchurch)**

11 The service provided by the Twynham team is of a mixed quality. Performance targets are routinely being achieved, and the service to residents seems generally good. However, whilst some staff seem knowledgeable and comfortable with their work, others rely too heavily on the assumption that South+West will meet targets without being actively monitored. Information management needs improvement, and there was no evidence to confirm that results from audits of gas certificates are collated by the Association.

12 Some limited information on gas servicing was found on the website, but it was difficult to locate and not written with the resident in mind. Information was included in the residents' handbook. Customer feedback with the service is positive, yet some queries are not answered promptly. There is no evidence that Twynham takes ownership for resident feedback and satisfaction on gas servicing. Staff involved with the 'no access' procedure use various methods of contacting residents in line with their profiling data, rather than rely on hard copy letters.

13 The Twynham policy appears to be out of date, with timelines that do not match the procedure. Flowcharts are not included, and it is difficult to easily interpret the timescales for various stages in the 'no access' process. Some gaps between stages are too long.

- 14 Gas servicing appointments are only during standard office hours, which gives limited choice to residents, but this should improve from April 2010 when a new contractor will take over. Online booking is not available, nor are text reminders. The contractor apparently issues a reminder to the resident prior to their appointment, although not in line with the written Twynham procedure. The service has not yet been extended to leaseholders.
- 15 Information on residents' vulnerabilities or other needs is available to the contractor, whose operatives will feed back information to Twynham staff if they discover a previously-unknown issue. Staff did not seem to be aware that they could access copies of Landlord's Gas Safety Certificates online. Twynham are trialling air source heat pumps in a small number of properties.
- 16 The Association receives weekly updates from South+West on properties entering the 'no access' procedure, from which point several staff at Twynham are involved in delivery. There was confusion between staff whether the timeline operated in working or calendar days, which makes performance management difficult. Logs are not kept on those residents who repeatedly fall into 'no access'; a sample of files reviewed indicates that there are a number of such cases, but that measures have not been put in place to try and deal with the problem. Legal costs for the 'no access' procedure have significantly reduced from an average of £750 per case to around £150, now that the work is done in-house by the Resident Services team.

## **17 Strengths**

- Information given to residents is succinct and helpful
- External contractor has access to advice flag information on residents' needs or warnings
- Appointment reminders issued to residents
- In line with profiling data collected, various methods of communicating with residents are used
- Information given to residents on gas safety and servicing is consistent, and matches with policy and procedure
- Legal costs for 'no access' procedure have been significantly reduced.

## **18 Areas for improvement**

- Not actively managing the Service Level Agreement with South+West
- Management of the 'no access' procedure is complex and information management inefficient
- Timelines within the policy do not match the procedure; staff interpret timescales in differing ways
- No out of hours gas servicing appointments for residents
- Procedure for appointment reminders does not match working practices
- No customer satisfaction carried out locally; do not 'own' complaints from residents
- Information on gas servicing on website is brief and difficult to locate
- Copies of quality audits are not retained by Twynham
- Letters for the 'no access' procedure are not always issued in a timely manner

- No work in place to address issues with residents who repeatedly enter the 'no access' process.

## **Sovereign South+West (Newbury)**

- 19 The service provided by the South+West team is of a very good quality. Staff are enthusiastic and knowledgeable, and actively manage their contractors to provide a high level of service to residents, taking action to address issues. There are low numbers of complaints, and performance targets are routinely being met. A good system for quality checks exists, including a process for any remedial works to be actioned.
- 20 Feedback from customers is positive. Gas 'awareness and safety' sessions have been held for residents, and the service takes part in regular Property Services neighbourhood feedback sessions. Service Improvement Panels are run with residents, and customer satisfaction surveys are carried out, however there are no specific surveys for gas. An Equality Impact Assessment is in place, and the Association is collecting improved profiling data on its residents.
- 21 There are four procedures for this service, which may be better amalgamated into one, however the style of the documents is good and they are well written. Flowcharts show clear timescales and responsibilities.
- 22 There is insufficient information on the website relating to gas safety and servicing, and no contact details to enable residents to request further details. Information is included in the residents' handbook however, and in 2009 a booklet promoting energy efficiency was sent to all residents. If they call South+West and are put on hold, residents are played a message on gas safety. Servicing is also available to leaseholders at a cost of £85, although currently as a pilot in the Newbury area alone. The appointment system is flexible and offers residents good choice, including evenings, weekends and two-hour slots. Although online booking is not currently available, residents can email the team to request an appointment. Engineers will call or text residents to advise them they are *en route*; if unable to gain access, they will place a sticker over door keyholes to advise the resident to call to rearrange another appointment.
- 23 The eleven-month servicing cycle has seen an improvement in performance, with fewer properties entering the 'no access' procedure and thus lowering administration costs. Engineers carry supplies of smoke- and carbon monoxide-detectors as a routine, and will install on the day of the gas servicing as necessary. A small number of properties are being used to trial alternative sources of energy.
- 24 When residents enter the 'no access' procedure, staff will liaise with their Housing colleagues to understand whether there are particular issues affecting the resident that need consideration. Those who repeatedly enter the 'no access' process are graded, with their servicing cycle shortened, and other repairs will not be carried out until the gas service is completed. External meters are capped and interrupters used where necessary. It is planned to invite those residents who regularly fall into the 'no access' process to a workshop to help the Association understand their reasons for failing to allow access.

## **25 Strengths**

- Knowledgeable staff who take responsibility and 'own' the process
- Well documented, comprehensive procedures

- System of gathering customer satisfaction information in place, with evidence that the information is analysed and acted upon
- Service available to leaseholders at market rate
- Hold gas awareness sessions for residents, and take part in Property Services neighbourhood feedback sessions
- Flexible appointment system
- Issue text or phone appointment reminders to residents
- Adapted heating controls fitted for those residents with a need
- Have an improved system for quality audits
- Actively managing contractors for performance and value for money
- Have processes to deal with residents who repeatedly enter the 'no access' procedure
- Good liaison work with other teams, including sharing information
- Contractors have access to advice flag information on residents' needs or warnings

## **26 Areas for improvement**

- Poor level of information on the website, and difficult to locate
- Appointments cannot be booked online directly
- No penalty clauses in contract with DR Jones Ltd
- Letters one and two in the 'no access' procedure are identical
- No evidence that engineers are routinely advising residents on energy efficiency.

## **Sovereign Kingfisher (Basingstoke)**

27 The service provided by the Kingfisher team is of a very good quality. Staff are proactive and aim to deliver an excellent service to their residents, working closely with their contractor. The service routinely meets its performance targets. Kingfisher also takes part in a regional gas benchmarking group to compare its services with other Associations. Internally, there is a high level of liaison between the team and Housing staff.

28 Feedback from residents is positive, and their comments are shown to influence the service. No Equality Impact Assessment was available, yet the Association has plans to analyse the profiling data it is collecting on its residents to inform service improvements.

29 A Quality Improvement Forum is held to enable residents to discuss policies, procedures and general performance, and the new gas policy was approved in this way. Whilst procedures are good, there are areas for improvement. Performance monitoring may be hampered as the management spreadsheet used does not match either the procedure or the policy.

30 Gas servicing forms part of the Kingfisher 'Home Health and Safety Check', an efficient, value for money service which aims to minimise inconvenience to the resident. It includes a number of other checks, all carried out in one visit by the contractor. There is comprehensive information for residents on gas safety on the website, with a link from

- 31 The Association advertises their gas servicing programme in a number of ways, and will shortly be issuing a new leaflet, 'Your Home Health & Safety Check is due', which includes a satisfaction survey and a prize draw. When residents telephone the Association, a recorded message gives them further information on the importance of gas safety. Gas servicing is also offered to leaseholders at a cost of £65, with future discounts available. Kingfisher will install adapted heating controls for disabled or partially-sighted customers. Engineers do not routinely discuss energy efficiency with residents, although the Association does take part in the British Gas 'Here to Help' programme.
- 32 Residents who repeatedly enter the 'no access' procedure are flagged on the housing management system, and lists are regularly published to all staff for information. The Kingfisher legal team will issue a Notice of Seeking Possession order along with an application for an injunction concurrently, which may be a heavy-handed tactic for dealing with residents, although the Association believes it ensures access early in the process and is cost effective.

### **33 Strengths**

- Staff are knowledgeable and show commitment to delivering a good service to residents
- Deliver the 'Home Health and Safety Check' to residents
- Adapted heating controls fitted for those residents with a need
- Website contains good information for residents on gas safety and servicing
- Wide choice of appointments and online booking available
- Text and phone appointment reminders issued to residents
- Quality Improvement Forum enables residents to influence the service directly
- Good liaison work with other teams, including sharing information
- Takes part in a gas benchmarking group with other Associations
- Has access to live information from contractor's system
- Service available to leaseholders at competitive rate
- System in place for carrying out quality audits
- Have processes in place to deal with residents who repeatedly enter the 'no access' procedure
- Use the British Gas 'Here to Help' scheme to assist residents with advice on energy efficiency, benefits and grants available.

### **34 Areas for improvement**

- Call wait times when telephoning contractor can be too long
- No financial penalties in the contract with Central Heating Services for poor performance

- Monitoring spreadsheet, procedure and flowchart do not fully match
- Monitoring some timescales on the spreadsheet can be difficult
- Procedure and flowchart do not mention service of Notice of Seeking Possession or court injunctions
- The service of a Notice of Seeking Possession with an injunction to gain access is not good practice.

## Notes on the Review Team

The team for this review comprised staff and residents, supported by the Orion Project Manager and Assistant.

Lead Inspector: Amanda Green, Housing Operations Manager, Sovereign South+West

Subject specialists: Tony Belcher, Estates Manager, Sovereign Vale  
Esther Findlay, Maintenance Manager, Sovereign South+West  
Trevor Percy, Surveyor (Building Services), Sovereign Kingfisher  
Ellie Roberts, Area Housing Manager, Sovereign Kingfisher

Resident Inspectors: Jonathan Hewitt – Sovereign Vale resident  
Chris Holliday – Sovereign Vale resident  
Teresa Nightingale – Sovereign South+West resident  
Jo Gardiner – Sovereign South+West resident  
Bryn German – Sovereign South+West resident  
Rebecca Evans – Sovereign Kingfisher resident  
Peter Lucas – Sovereign Twynham resident

The peer review took place between January and March 2010. Dates for site visits were:

Sovereign Vale (East Hanney) – 8-9<sup>th</sup> February  
Sovereign Twynham (Christchurch) – 15-16<sup>th</sup> February  
Sovereign South+West (Newbury) – 18-19<sup>th</sup> February  
Sovereign Kingfisher (Basingstoke) – 23-24<sup>th</sup> February

The commentary in this report contains the findings of the peer review team, using the evidence gathered from interviews with managers, staff and residents (service users); mystery shopping; visits to properties; case studies and documentation reviews and checks.

## What are we doing to improve?

Actions – for Sovereign Vale	Timescale
Publicise service standards more widely to residents.	Aug 10
Consider implementing new ‘no access’ letters, in line with those proposed by Resident Inspectors (see annex).	Aug 10
Update website to include information on the service, plus health and safety advice, emergency contacts, and energy efficiency.	In line with website project
Ensure that resident vulnerabilities and preferred contact methods are routinely logged on the housing management system. Use profiling data to ensure communication methods meet residents’ needs.	Ongoing
Contact residents prior to their first appointment to confirm.	June 2010
Benchmark the return rate of customer feedback forms, and consider issuing a specific form for the service in a more timely manner. Analyse the results and use to drive service improvements.	July 2010
Ensure that customer feedback and complaints are fed back to staff more actively.	July 2010
Review, improve and amalgamate monitoring spreadsheets.	March 2011
Collect data on why residents miss appointments and use the information for continuous improvement. In future, use profiling data to help further understand trends and take corrective action.	September 2010
Update the procedure to include flowcharts showing timescales and clear responsibilities; review to ensure that it matches the policy.	Tbc
Ensure staff are working to correct policy and procedure.	Complete
Synchronise procedure, policy and monitoring spreadsheet.	Tbc
Update forms used by engineers to clarify the need to carry out visual checks on residents’ gas appliances. Deliver additional staff training if necessary.	September 2010
Improve staff awareness of how much the service costs to deliver.	September 2010

<b>Actions – for Sovereign Twynham</b>	<b>Timescale</b>
Publicise service standards more widely to residents.	30 Dec 2010
Consider implementing new ‘no access’ letters, in line with those proposed by Resident Inspectors (see annex).	30 June 2010
Take greater ownership of the Service Level Agreement with South+West, and update to include penalty clauses, details of measures to achieve value for money, and complete appendices where necessary. Re-establish meetings to discuss ongoing performance and other issues.	30 June
Update website to include information on the service, plus health and safety advice, emergency contacts, and energy efficiency.	30 June
Increase promotion of gas servicing and safety in newsletters, leaflets and other means, e.g. neighbourhood events.	30 June
Undertake a review of the value for money of the current service overall, including the ‘no access’ process.	30 June
Ensure that a representative from Twynham attends contractor meetings on a regular basis.	Completed
Update the policy to include servicing in voids and mutual exchanges, gas capping/use of interrupters, and remove outdated references.	30 June
Update the procedure to include clearer responsibilities and timescales (including clarification of stages in either working or calendar days), and match to policy. Provide staff training on the changes.	30 June
Streamline the ‘no access’ process and improve ownership.	30 June
With regard to appointment reminders, align the procedure with actual working practices.	30 June
Use customer feedback surveys; manage and monitor the information gathered and use to inform service improvements.	Ongoing
Actively seek information from South+West on customer satisfaction, complaints and compliments; analyse and use this information.	30 June

Improve frontline staff knowledge of the gas servicing process.	30 June
Actively seek information from South+West on quality audits carried out.	Completed
Apply more rigorous monitoring of performance to ensure procedures and timescales are adhered to in the 'no access' process, and take corrective action where needed.	30 June
Update the sign-up checklist with regard to gas safety.	30 May
Implement an 'affordable warmth' policy.	30 July
Establish measures to manage those residents who repeatedly fall into the 'no access' procedure. Carry out analysis on the profile of these residents.	30 June
Improve information management with regard to local spreadsheet and hard copy documentation for the 'no access' procedure.	30 June
Undertake a value for money review and if appropriate, offer gas servicing to leaseholders.	Completed

<b>Actions – for Sovereign South+West</b>	<b>Timescale</b>
Publicise service standards more widely to residents.	Aug 10
Consider implementing new 'no access' letters, in line with those proposed by Resident Inspectors (see annex).	Tbc
Update the website to include information on the service, plus health and safety advice, emergency contacts, and energy efficiency.	Tbc
Amend the Equality Impact Assessment to include information on how resident profiling data will be used.	Complete
Update current procedures and streamline – remove policy into a separate document.	n/a
Review the current service offered to leaseholders, and – providing it gives good value for money – extend to other regions.	Tbc
Provide a facility for booking appointments online.	Tbc
Include on engineers' paperwork a prompt reminding them to advise residents on energy efficiency and	Tbc

proper use of their heating systems and controls.	
Improve access to advice flags on residents for contractor DR Jones Ltd.	Tbc

<b>Actions – for Sovereign Kingfisher</b>	<b>Timescale</b>
Publicise service standards more widely to residents.	June 10
Consider implementing new ‘no access’ letters, in line with those proposed by Resident Inspectors (see annex).	June 10
Ensure actions from meetings with contractors are routinely followed up.	Immediate
Add information to policy and procedure on when gas capping or the use of interrupters will be authorised.	June 10
With regard to the issue of Landlord’s Gas Safety Certificates to residents, synchronise the timeline between the policy, procedure and residents’ leaflet.	June 10
Address the issue of long call wait times with the contractor, and confirm that they are monitoring performance in the correct, agreed manner.	May 2010
Complete an Equality Impact Assessment for the service.	August 2010
Ensure that the monitoring spreadsheet matches the policy and procedure.	May 2010
Remove the requirement to serve a Notice of Seeking Possession whilst applying for an injunction to gain access to a property.	n/a