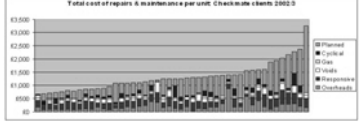



**National Housing Maintenance Forum  
Checkmate Benchmarking Club**

Tim Wilson M3 Consultancy  
Robin Summerhill M3 Consultancy


## Topics

- What is it
- History of Checkmate Benchmarking Club
- The new on-line Checkmate
- Why get involved


## What is it

- A nationwide benchmarking club on repairs and maintenance
- Client side: benchmarks costs and quality of performance in delivering services to tenants
- Contractor side: benchmarks the efficiency and performance of direct works organisations




## What is it ?

- Checkmate uses a number of measures to establish benchmarks, at a level of detail that is not currently available through any other benchmarking service.




- Managed by the Checkmate Working Party made up of maintenance practitioners from Checkmate members, DWF, KPMG, Rand Associates, and NHMF, with advice from Housing Corporation




## History


- The DWF commissioned a benchmarking study in 1999 to compare the performance of Direct Works Organisations
- In 1999 a HAMMAR South West study developed detailed performance indicators for benchmarking delivery of repairs services to tenants, aided by a grant from the Housing Corporation
- 2000 Housing Corporation commissioned KPMG to develop a methodology for judging which DLOs were an asset to their parent organisations, particularly relating to voluntary transfers



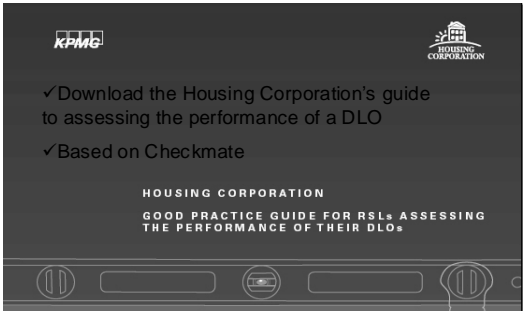
## History



- HAMMAR, the DWF and KPMG joined forces with the NHMF to set up the Checkmate Benchmarking Club in 2000
- The working party also had representatives of the Housing Corporation, ACSCO (now PSI) and the National Housing Federation
- Development was funded by the DWF, the NHF, and the NHMF




### KPMG study for Housing Corporation




- ✓ Download the Housing Corporation's guide to assessing the performance of a DLO
- ✓ Based on Checkmate

HOUSING CORPORATION  
GOOD PRACTICE GUIDE FOR RSLs ASSESSING THE PERFORMANCE OF THEIR DLOs


<http://www.housingcorp.gov.uk/upload/pdf/dloHousingCorpReport.pdf>



### Working with Housemark




- In 2003 we pooled our benchmarking data with Housemark and produced a joint report
- About half our members also participate in Housemark




### Members

- Data from over 120 members over last 7 years
- Mix of RSLs and Local Authorities
  - 80 + Housing Associations
  - 40 + Local authority housing departments, and ALMOs
- Mix of client and contractor
  - 88 have submitted Client data
  - 66 have submitted Contractor data




Amber Valley 6	Hull BC 7	Southend-on-Sea 6
Bourville Village Trust 3	Kerrier Homes 6	Sovereign HA 2
Bournemouth City Council	Bradford Community Housing	Central & Cecil Housing Trust
Burnley & Padiham 1	Kings' Lynn 2	Staffordshire Property & Care 2
Cheltenham Borough Homes 6	Kirklees Building Services 5	Sunderland HG 6
Chesterfield BC 3	LB Havering 2	Swaythling HA 5
Chichester DCH 2	Magna HA 5	Tending DC 4
Coast & County Housing 4	Magna West Somerset HA 4	Tynedale 1
Cottsway(West Oxfordshire) 6	Maidenhead 1	Vale HA 1
Dane Housing (Congleton) 4	Martlet Homes 7	Warsbeck DC 7
Derwentside DC 7	Newton Housing Trust	Weaver Vale HT 3
Doncaster MBC 2	North East Derbyshire DC 6	Wessex Property Services 5
East Thames HG 2	North East Linc Council 4	Westlea HA 7
Elgar HA( Partnership HG) 3	Ocean Housing 7	Weymouth & Portland 3
Erimus Housing	Oxford City Homes 7	Riviera
Gloucester Council 3	Peterborough City Council 3	Whitefriars 2
Gulford BC 3	Richmond HP 4	William Sutton 3
Helena Housing 5	St Leger Homes	Wirral Partnership Homes
Herefordshire Housing 7	Sandwell 7	Willow Park 1
Herritage 5	Scarborough BC 3	Windsor 7
Hexagon 4	Sevenside Housing 6	Wirral Partnership 7
Hillingdon Homes Ltd 5	Somer Community HT 2	Worcester 6
Homezone 7	South Essex Homes 7	Wyre Forest Community Housing 1
Hourslow Homes 4	Horizon (SLPHA) 6	Wyre HA 5
Wolverhampton Homes	South Warwickshire 1	Wulvern Homes

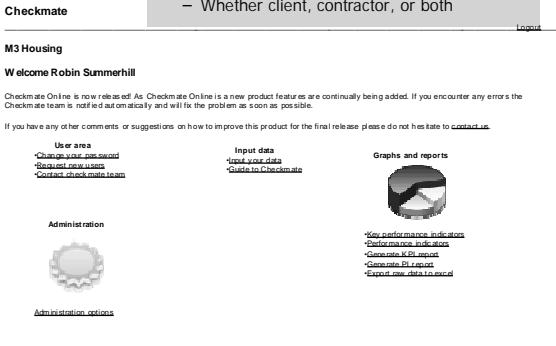


### Now on-line


- Major review during 2005/6
- Members wanted
  - Immediate reports when data is submitted
  - Easier to complete questionnaires
  - Traffic lights to highlight best and worst PIs
  - Clearer more graphical reports
- Solution was to develop Checkmate on-line
  - Completed beta testing in August 2006



- Members log-in with email address & password
  - Controls whether they can input data
  - Whether client, contractor, or both



The screenshot shows the Checkmate online interface. At the top, it says 'Checkmate' and 'M3 Housing'. Below that, it says 'Welcome Robin Summerhill'. There is a 'Log out' link. A message states: 'Checkmate Online is now released! As Checkmate Online is a new product features are continually being added. If you encounter any errors the Checkmate team is notified automatically and will fix the problem as soon as possible. If you have any other comments or suggestions on how to improve this product for the final release please do not hesitate to contact us.' Below the message are three main sections: 'User area' with links for 'Change your password', 'Request new users', and 'Contact checkmate team'; 'Input data' with links for 'Input your data' and 'Guide to Checkmate'; and 'Graphs and reports' with a 3D pie chart icon and links for 'Key performance indicators', 'Performance indicators', 'Generate KPI reports', 'Generate PI report', and 'Export raw data to excel'. At the bottom, there is an 'Administration' section with a gear icon and a link for 'Administration options'.



### Repairs and Maintenance

**Special Note - VAT**  
VAT payable will vary depending on your type of organisation and also whether you have a Direct Labour workforce. Please enter your costs below **INCLUDE** of VAT, and show the amounts of VAT actually paid at section 3

Order details

Priority	Jobs completed by (calendar days)	DLO	Minimum completed on time	Long time to complete (calendar days)	Maximum completed late	Value
2.1 Responsive Maintenance	3	210	203	3	7	22,274
2.1.1 Out of hours service	3	210	203	3	7	22,274
2.1.2 Emergency	1	2,850	2,746		104	6,000,000
2.1.3 Urgent	1	7,260	7,162		98	6,000,000
2.1.4 Routine	28					6,000,000
2.1.5 Non-routine	30	0	0		0	0
2.1.6 Other categories	30	0	0		0	0
<b>Total</b>		<b>17,260</b>	<b>14,202</b>		<b>3,058</b>	<b>61,984,274</b>
2.1.8 Void property repairs	40	0	0	27	days	20,000,000
2.1.9 Gas servicing		5,500				200,000
2.1.10 Work for other organisations						
<b>Total</b>		<b>5,500</b>	<b>0</b>			<b>200,000</b>

Main local authority: West Wiltshire

Period being examined (months): 12

Date of last inspection: 20/06/2008

Number of stars at last inspection: 2

Improvement rating at last inspection: 2

Buttons: Save progress, Save section as completed, Save & next

### Inputting progress

- Organisation profile
- Order details
- Repairs and maintenance
- VAT
- Void
- Trading account
- Energy efficiency and Decent Homes
- Customer satisfaction with maintenance service
- Contractor information
- General information

### Job Baskets

You have indicated that you use the NHF Schedule of Rates. If you would like to automatically calculate the job baskets for Responsive and Void jobs, please click below. Please note Gas, Cylindrical and Planned Jobs will still need to be entered manually.

Automatically update job baskets:

- Gas jobs
- Cylindrical maintenance jobs
- Planned maintenance jobs
- Responsive repair items
- Void repair jobs

### Checkmate

Job Baskets

Filled automatically if you specify an uplift to the NHF Schedule of Rates

If you are paying different prices for the same repair in different areas, the prices should be those applying in your main or largest area, relevant to your main cost group. The Planned Maintenance, Gas Servicing, and Cylindrical Maintenance sections should be filled by all Clients and all DLOs that engage in these activities. The Response Repair section and Void section only need to be completed if the NHF Schedule of Rates is not being used.

Item	Description	Amount Qty	Unit of measure	Your Rate	Your Total cost
1	00307 Path-Renew concrete path, break up concrete, excavate, remove soil, fill soft spots, level and compact, 100mm hardcore bed, bladed, 50mm concrete trowelled smooth, all labours, formwork	5	SM	71.51	0.00
2	007011 Flat-lift remnants of existing 50mm standard size sicc paving flags, remove soil, fill and compact hardcore to 50mm, lay new flag on 25mm mortar (1:4), point up joints and all labours.	5	SM	71.11	0.00
3	017201 Fencing/Renew any intervention or overlap fence panel ne 1.80x1.80m fixed with galvanized metal support brackets to existing posts, remove and dismantle existing and remove spoil.	2	NO	98.00	0.00
4	01904 Drain/Clear blocked drain run by pressure jet, remove and refix manhole covers and gratings, includes all hire charges, flush out, test and remove spoil.	1	HR	63.63	0.00
5	20103 Ridge/Renew half round ridge or hip tiles edge bedded onto roofing tiles with solid bedding at butt joints in coloured mortar (1:3) and remove spoil.	3	LM	44.03	0.00
6	20303 Slate/Renew fibre cement slates to roof including remove existing and fix new with copper nails and disc rivet and remove spoil (in group over 5 No.).	8	SM	43.21	0.00
7	20503 weatherstripping, stormwings, make good, decorate ne 1.500m, ne 2 No. opening lights.	1	NO	523.74	0.00
8	31201 Door/Renew front door with any size 44mm softwood panelled, glazed or part glazed door, hang on 1.5 pair butts, fit stormwings, weatherstrips, double glazed, make good and decorate to match existing.	1	NO	124.16	0.00
9	33001 Door/Renew internal door with any size ne 40mm thick plywood faced single skeleton core flush door, hang	1	NO	124.16	0.00

### Checkmate KPI Report

The data you are looking at: Most recent data from all organisations with BM inflation

Response Item Priority	Total jobs	Number completed on time	% on time	Order Value	Average on the value	Lower quartile	Median	Upper quartile	Rank
h214 Emergency	3,040	2,926	96.25%	£20,224,428	£6,661	£1,000	£1,000	£1,000	29 / 42
h215 Urgent	4,340	4,162	95.88%	£84,000	£19	£0	£10	£10	106 / 111
h216 Routine	7,865	6,441	81.91%	£17,000	£2.16	£0	£0	£0	96 / 112
h217 Other	1	1	100.00%	£100,000	£100,000	£100,000	£100,000	£100,000	1 / 1
h218 Responsive	15,246	14,530	95.37%	£280,000	£18.36	£0	£0	£0	95 / 111
h219 Void	443	443	100.00%	£200,000	£451.24	£200,000	£200,000	£200,000	1 / 1
<b>Total</b>	<b>17,726</b>	<b>14,952</b>	<b>84.35%</b>	<b>£2,271,234</b>	<b>£128</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>114 / 114</b>

### Checkmate KPI Report

Lists 30 Key Performance Indicators

With traffic lights to highlight what matters

Response Item Priority	Total jobs	Number completed on time	% on time	Order Value	Average on the value	Lower quartile	Median	Upper quartile	Rank
h214 Emergency	2,280	2,251	98.73%	£26,000	£115	£0	£0	£0	28 / 42
h215 Urgent	4,180	4,704	112.54%	£435,352	£104	£0	£10	£10	28 / 111
h216 Routine	6,140	6,147	100.11%	£402,520	£65.56	£0	£0	£0	9 / 111
h217 Other	1	1	100.00%	£100,000	£100,000	£100,000	£100,000	£100,000	1 / 1
h218 Responsive	15,246	14,530	95.37%	£280,000	£18.36	£0	£0	£0	95 / 111
h219 Void	443	443	100.00%	£200,000	£451.24	£200,000	£200,000	£200,000	1 / 1
<b>Total</b>	<b>16,659</b>	<b>15,830</b>	<b>95.02%</b>	<b>£874,872</b>	<b>£52</b>	<b>£0</b>	<b>£0</b>	<b>£0</b>	<b>114 / 114</b>

### Checkmate

Performance indicators

Data Set Options

- Only the current Round.
- Only data 12 months back.
- The most recent data for all organisations.
- All data for all organisations.

Inflation method

- BMI
- RPI
- None

Organisation Filter

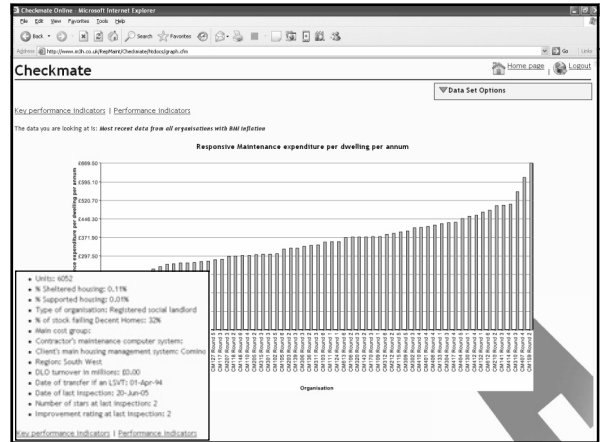
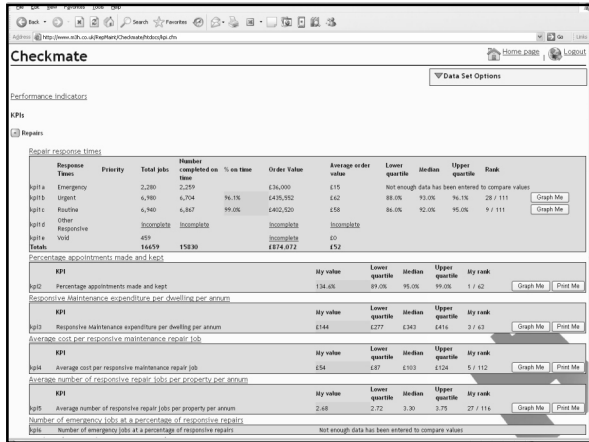
Any Filter by cost group

Any Organisation type

Change Data Set

Annotations:

- h214: This is where you select which data sets to benchmark against
- h215: The default is to select the latest data from all members. You can specify how many years to limit this to
- h216: By default cost data from previous years is inflated by the BMI, but you can choose RPI or no inflation
- h217: You can also filter by cost group (TCI), type of organisation, or region



## Benefits

- None of us can afford to rest on our laurels
- Invaluable information indicating strengths and weaknesses
- Can-openers
  - Where could we improve
  - Who might have ideas we could learn from
  - What targets should we set to raise our game
- External validation of year on year improvements

## Questions

- Try it at [www.checkmateclub.co.uk](http://www.checkmateclub.co.uk)
- Email us at M3 Housing
  - [Dave.treanor@m3h.co.uk](mailto:Dave.treanor@m3h.co.uk) Manager
  - [Liz.circuit@m3h.co.uk](mailto:Liz.circuit@m3h.co.uk) Operation
  - [Robin.Summerhill@m3h.co.uk](mailto:Robin.Summerhill@m3h.co.uk) Interpretation
  - [info@m3h.co.uk](mailto:info@m3h.co.uk) Consultancy
- Phone 020 8254 5580
- Explore [www.m3h.co.uk](http://www.m3h.co.uk)