

# National Housing Maintenance Forum

Setting the standards for repairs and  
maintenance



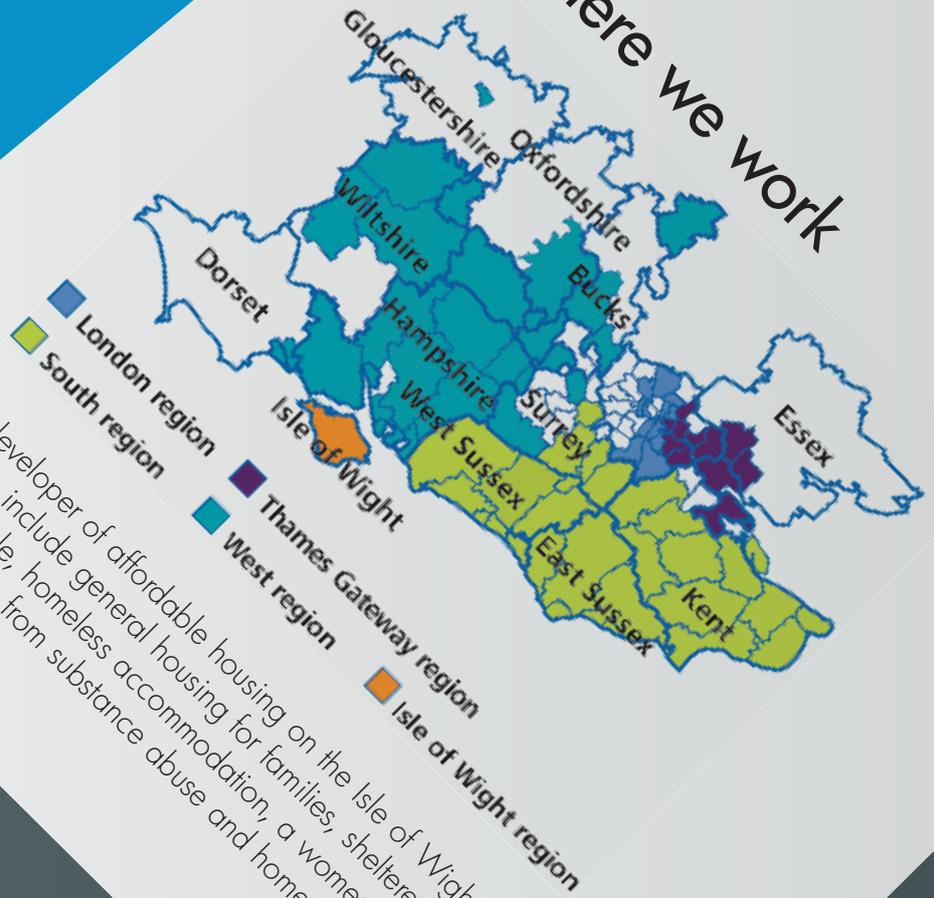
Best Practice Awards 2013

Southern Housing Group  
Isle of Wight Region

Category: Best Contract



## Where we work



### Isle of Wight

We are a major provider and developer of affordable housing on the Isle of Wight, with over 3,000 properties. Our homes include general housing for families, sheltered schemes for the elderly, homes for young people, homeless accommodation, a women's refuge, supported housing for people recovering from substance abuse and homes for people with learning difficulties and mobility needs.



## Introduction

### Southern Housing Group

As one of southern England's largest housing associations, we own and manage 25,643 homes for more than 66,000 residents. We employ more than 900 people and work with more than 70 local authorities.

Southern Housing Group Limited is the asset-owning parent body; Southern Home Ownership markets a range of low-cost home ownership and intermediate rent options, and Southern Space is a wholly-owned subsidiary of Southern Housing Group Limited set up in May 2005 to develop homes for outright sale.

Our mission is to unlock the potential of people and places. We've been doing this since 1901, when our founder Samuel Lewis bequeathed £670,000 (equivalent to £30 million today) to provide housing for the poor. We achieve this by:

- Developing quality, affordable housing
- Improving the neighbourhoods where our residents live
- Developing a range of rent and home ownership opportunities
- Investing in our staff, our residents and our legacy

Our experience has taught us that investing in people and communities is as important as building homes. This philosophy has been the bedrock of our activities for more than 100 years.

# Robert Heath Heating

Established in 1979, Robert Heath Heating is a specialist heating service and maintenance contractor, operating almost exclusively in the social housing sector. On-going and substantial investment in ICT over many years has allowed the company to deliver contracts nationally. Head Office in New Malden, Surrey includes a 24 hour Contact Centre and an accredited and award winning in-house Training Academy.

Robert Heath Heating began working with Southern Housing Group in 2004, initially providing a "3-star" gas service and maintenance contract for stock in a fairly confined area of South East England. As the Group has grown, the cover provided by RHH has expanded and, following an OJEU procurement exercise in 2012, RHH now provide full heating installation, service and maintenance cover to over 13,000 SHG properties ranging from Kent to Wiltshire and including inner London Samuel Lewis Trust estates.

The Isle of Wight region has fallen outside the main Southern Housing Group gas contract and was procured in 2009 following a unique and innovative joint procurement including the island's other large social housing provider Medina Housing Association, part of the Spectrum Group.

Robert Heath Heating successfully tendered for both contracts and the five year contract to which this submission relates began in April 2009 and covers 2,056 **Southern Housing Group** properties across the Isle of Wight.



## Aspirations of both organisations

SHG and Robert Heath share the same goal which is to provide the highest standards of service to residents of the Isle of Wight. The mission statement of Robert Heath Heating is to become the leading innovative provider of energy contract services to the social housing sector. Achieving MCS accreditations in 2011 has allowed the company to enter the renewable energy market.

Prior to 2010 on the Isle of Wight, Southern Housing Group had installed 60 Solar Thermal installations and 2 Air to Air Installations. In 2010 there was a step change in thinking and approach to delivering renewable technology on the Isle of Wight following an approach from Dame Ellen McArthur, who following her retirement from sailing set up a foundation (The Ellen McArthur Foundation) to deliver sustainable projects, training and education. Ellen was keen for her first project to be on the Isle of Wight, and working with her we identified a community in Chale where a large number of our residents were in fuel poverty on an estate of 68 properties that was suffering from a number of other issues. With the help of a DECC Grant of £500,000 plus £160,000 from the Ellen McArthur Foundation we embarked on the project. This was followed by RHPP 1, 2, and now 3 grant funding **from The Energy Savings Trust totalling around £700,000** and SHG have fully embraced the opportunity to include Robert Heath Heating into the current installation programme, fitting air source heat pump and solar thermal systems **across our hard to heat and "off gas" properties.**

# Description of the services provided

Robert Heath Heating provides a full 24/7, 365 day “3-star” gas servicing and maintenance contract to 2,056 with-gas properties owned by Southern Housing Group and located on the Isle of Wight. Our homes consist of houses, flats and bungalows, for families, sheltered schemes for the elderly, homes for young people, homeless accommodation, a women’s refuge, supported housing for people recovering from substance abuse and homes for people with learning difficulties and mobility needs. The contract includes service and maintenance of commercial plant as well as domestic boilers and has developed into the area of renewables, including the installation and on-going servicing of Air Source Heat Pumps and Solar Thermal systems.



## Why the contract is being put forward for an award

The only legal requirement for a landlord is to ensure that a valid Landlord Gas Safety Record is produced for their property every year.

For the last 3 ½ years Southern Housing group IOW have enjoyed genuine 100% Landlord Gas Safety Record compliancy – **meaning that every property has, for every single hour of every single day during this period, held a valid LGSR.** Compliancy is not just achieved to meet month or year-end targets but is monitored and maintained using innovative and shared techniques and practices on an on-going and continuous basis.

These best practice methods are now being rolled out across the other regions within Southern Housing Group and Robert Heath Heating are also adopting the solutions for all of their 100,000 properties under contract on the mainland.

In addition, the commitment of [Southern Housing Group on the Isle of Wight](#) to offer residents alternative heating solutions, as part of the on-going effort to tackle fuel poverty, has resulted in award winning development work on the island, and the heating contract with Robert Heath has developed to include these new technologies.

Robert Heath, as a mainland contractor, was faced with the challenge of establishing itself as a local heating contractor on the island. By establishing an office in Newport, recruiting administrators, including the role of Resident Liaison Officer for the island, integrating 14 island based engineers under TUPE arrangements, most of whom remain with the company, and introducing them to the real time connected PDA technology which drives service delivery, the company has successfully established itself as the leading heating contractor on the Isle of Wight. Commitment to this was demonstrated, during some of the worst weather conditions seen on the Isle of Wight for some 20 years, many roads were blocked by snow and ice due to the island only having 1 gritting vehicle. Robert Heath Heating hired 4 x 4 vehicles to reach residents, and some engineers even walked to local residents to ensure the best possible service was maintained.

## What is innovative about the service provided?

Firstly, the method by which the contract was procured was innovative. Southern Housing Group collaborated with Medina Housing Association (part of Spectrum Housing Group) to jointly procure the Gas Servicing and Maintenance Contract. Working together we could provide a larger number of properties, to ensure the contract could be financially more viable for any new companies, and at half the procurement costs to each organisation.

*“During 2008/9 Medina Housing Association, part of Spectrum Housing Group undertook a collaborative procurement exercise with Southern Housing Group (IW) for a new gas servicing and maintenance contract. The collaborative process was innovative locally and was logical due to the specific geographical restrictions on the Isle of Wight. It meant that it was possible to obtain a critical mass on a contract that would allow a wider group of contractors to tender and bring economies of scale to the benefit of both organisations. The procurement was carried out under full European tendering protocols and with full resident involvement from both organisations at all stages. Both organisations benefitted from the sharing of expensive and complex procurement processes. Overall, it is clear that the collaborative process of procurement on this contract was very successful”*

– Stuart Clark Property Services Manager Medina Housing Association



## Why was innovation necessary?

The only legal obligation facing a landlord is to ensure that every property has a valid Landlord Gas Safety certificate. Following recent high profile “incidents” and accidents involving gas appliances it is vital that we obtain access to properties to undertake the annual safety check. Access procedures are always under scrutiny and innovations in the means by which we gain access, and also education of residents in the importance of allowing us access, are always sought.

Secondly, the heating industry has suffered a severe skill shortage in recent years. With the demise of the old gas apprenticeships, the quality of newly qualified gas engineers has been lower than at any time in the past, whilst the boilers and appliances on which they work have become more complex. Innovation in both the methods by which engineers are trained and the provision of “tools” to assist them in their work ensures the highest quality repairs service is provided to residents.

## How did innovation evolve?

Robert Heath Heating has always been at the forefront in the use of ICT to deliver their service. In 2001 they had been the first gas contractor to introduce electronically produced gas safety certificates.

However ICT systems are only as good as the people who use the systems and it is the collaborative approach to the development of innovation which has been a hallmark of this contract.

### Ten Innovations introduced and developed over the course of the contract:

#### 1. Real Time Connected PDA Technology on the Isle of Wight

Having introduced PDA technology for all operatives over eight years previously, the first requirement of the new contract in 2009 was to introduce the technology to the new TUPE'd engineers, to whom the technology was unfamiliar. Contract administrators had been used to piles of manual LGSRs to be sorted and filed. RHH was able to lighten the administrative load of the SHG staff by providing electronically produced LGSRs available in pdf format via web portals.

#### 2. The role of a Proactive RLO (Resident Liaison Officer)

Two administrators came across to Robert Heath under TUPE arrangements. The RHH IT systems meant that only one administrator was required. However, rather than consider redundancy, one of the administrators was trained into the role of RLO for the contract. As the “face of the new contractor” on the island, and being a local person, the RLO quickly helped the new contractor settle in on the Isle of Wight.

#### 3. Introduction of SMS Texting as a means of Communication with residents

Robert Heath's texting facility is fully automated with appointment reminder texts firing 24 hours in advance of the engineer's visit. Furthermore the SMS service is continually being enhanced, allowing for a second reminder text to automatically be sent when the engineer clicks his PDA to accept the appointment as his next job.

#### 4. Access Videos

A really unique service developed for this contract has been the production of videos which are accessed via a link embedded in the SMS texts described above. A short video featuring one of the RHH administrators directly addresses the resident and reminds them of the importance of allowing access to their home and explaining briefly what a service visit will involve.

We invite you to see the Access Videos by clicking on this link

[http://www.youtube.com/channel/UCeM6WqS6xNrwrHGAH4qTNUw?feature=results\\_main](http://www.youtube.com/channel/UCeM6WqS6xNrwrHGAH4qTNUw?feature=results_main)

#### 5. Service Dashboards

The Robert Heath migration to "Cloud Technology" IT servers has allowed for the development of Service Dashboards, made available via Apps to the smartphones of Southern Housing Group staff. The Service Dashboards show, in real time, all of the Key Performance Indicators relating to the contract, and are therefore accessible at any time, day or night via smartphone.

#### 6. Video Conferencing

Robert Heath's unique partnering relationship with CISCO, the world's largest Unified Communications Network provider, has allowed for the development of a Video Conferencing platform which is free to clients. The ability to video conference on this contract has involved no cost to Southern Housing Group and is a useful tool to minimise expensive travel for RHH staff to the Isle of Wight, and substantial reduction in the Carbon Footprint of the contract.

#### 7. RHH You Tube Channel—Gas Safety Videos

Via the Robert Heath Heating You Tube Channel, which can be accessed using the link shown above, SHG residents can see a range of videos, produced by RHH and featuring RHH staff which provide instruction as to the safe and efficient use of heating systems. The videos are no more than two or three minutes in length and have now been produced in a number of languages to ensure consistency of service delivery to all residents, regardless of race.

#### 8. Mobile-platform Web Portal

Since the start of the contract in 2009, RHH has provided a password protected web portal for SHG Isle of Wight staff, showing asset information, work in progress on the contract and all KPI data all in real time. Following the RHH migration to Cloud technology, mentioned earlier, the web portal has been made available to staff via an App on mobile phones. This means SHG staff can literally be outside a property preparing for a visit, and can check details of the property via their phones.

#### 9. Shared Customer Service Training

Since 2009 RHH contract staff have benefitted from involvement in the commitment of the Southern Housing Group to Customer Service Training for all staff. Courses have been organised on the Isle of Wight as well as at SHG offices on the mainland, to which RHH staff have been invited. And the commitment to sharing is reciprocal as a number of SHG Isle of Wight staff have been involved in Gas Safety Awareness courses run in the RHH Training Academy in Surrey.

#### 10. Shared Commitment to Lean Management

Southern Housing Group Management is committed to the notion of Lean Management and Systems Thinking and have brought these concepts to the management of this Gas contract. As well as shared training in Lean, Robert Heath have been introduced to the concept of Exception Reporting and Winchart Software as the primary means of measuring the most important of all KPIs, Customer Satisfaction



# How do you monitor effectiveness?

With the concept of Lean in mind, this contract focusses on Customer Satisfaction as the primary driver of service excellence, and the most meaningful of all performance measures. It is possible to “fail” a KPI category, whilst achieving high customer satisfaction. For example an “end to end time” for a job may fall outside a target parameter because a resident asks us to postpone a visit to suit their convenience. Similarly 100% LGSR compliancy may disguise high broken appointment figures, which general means dissatisfied customers.

Service improvement and service excellence is achieved not by simply reporting KPIs at a monthly Contract Progress meeting. On this contract KPIs are available in real time, via hot keys on the web portal provided by RHH.

Performance measurement on this contract is about measuring and understanding “Good Performance”, and, in particular, understanding what constitutes good performance from an end user perspective – i.e. customer satisfaction.

Performance Measurement is achieved by means of Control Charts, Pareto Charts and “Collaborative Solutions” between Southern Housing Group and Robert Heath.

For example, using Control Charts we report all log to repair jobs against a mean target, with upper and lower control limits. We then focus on the jobs which fall outside these limits, with the Contractor providing explanations and understanding as to the reasons why the control limits had been exceeded. Once we have reached an understanding, specific measures are put into place to improve performance

Two years ago control charts identified that there were too many addresses requiring multiple visits from Robert Heath engineers, thus causing them to fall outside a control limit. Robert Heath undertook an exercise showing, for every property visited more than once over a twelve month period, the precise reasons why the visits were required. This led to shared concerns over the diagnostic capabilities of individual engineers on the contract. This in turn allowed RHH to put together, with the assistance of our boiler manufacturer supply chain partners, tailored diagnostic and fault finding courses held in their Training Academy, which Isle of Wight engineers were sent over to attend. This has resulted in fewer multiple visits over the ensuing months and a consequent increase in customer satisfaction on the contract.

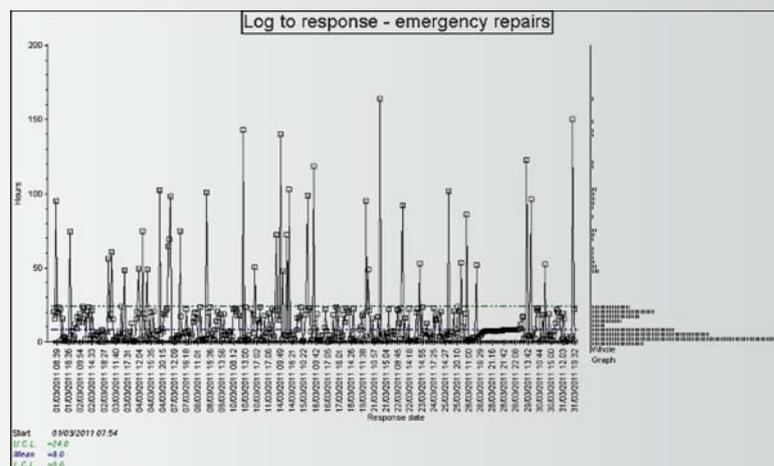
There were other Service Improvements achieved as result of the above exercise. The data also showed that most of the multiple visits involved two or more different Robert Heath engineers. An RHH policy was agreed whereby an engineer diagnosing a fault requiring a part not held as van stock, has to be the same engineer who re-attends that property to fit the part. Previously this had, too often, not been the case, and although this new policy has occasionally meant a lengthening of log to completion times, this trade off in terms of efficiency has led to service improvement.

The identification of areas for service improvement to assist us with the delivery of service excellence is something that is continuous with the information being derived from the analysis of repair data and customer feedback.

Through drilling down into the data both the SHG Isle of Wight and Robert Heath Contract Management teams are able to identify the exceptions within the day to day activity and establish whether there is a common theme with these exceptions. Operational meetings, often held by Video Conferencing discuss these and identify the cause and how to eradicate.



## Example of Winchart Reporting

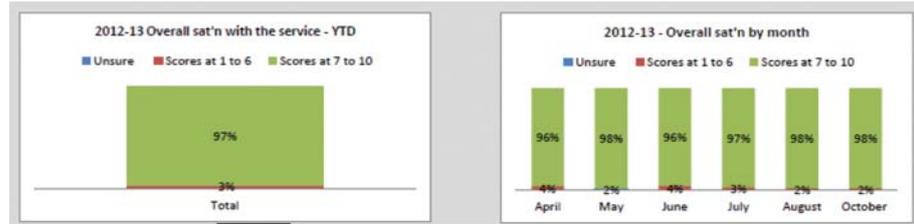


## Benefits to the client include:

**100% compliance for Gas Servicing for 3 ½ years, not just at the end of each year or week, but every hour of every day of every year!**

Robert Heath Heating provides gas servicing and maintenance to over 100,000 properties throughout the country and states Southern Housing Group IOW region as their best performing client.

Consistently high resident satisfaction



- Robert Heath Heating call centre facility initially operated as an extension of the Group's own with the same operating hours for customers, 8am to 8pm Monday to Friday and 8am-1pm Saturday's with calls going directly to Robert Heath. As of the 1st October 2012 the Robert Heath call centre operates 24 hours a day, 7 days a week, receiving all calls directly.
- Robert Heath Heating's capability, capacity and experience have been used to increase productivity and deliver real cost reduction without affecting the service standard received by residents – a key objective for the Group.
- Reduced staff costs and legal fees in trying to gain access into properties with overdue LGSR's
- Value benefits in Robert Heath Heating undertaking smoke detector and carbon monoxide detector testing and servicing whilst undertaking the gas servicing
- By offering a long term contract (potential 10 years depending on performance) and jointly procuring with Medina Housing Association this gave us huge buying power, and the ability to leverage substantial investment from Robert Heath Heating into the service .
- At the end of each month Robert Heath Heating provide the Group with the suppliers invoices for all boiler installs undertaken that month to enable the Group to claim back £100 per boiler from Valliant which then goes to new installs.
- Access to the Robert Heath Heating web portal provides live "real time" data to enable SHG staff to track the position at all times.
- Robert Heath Heating work in conjunction with Mountjoy (our day to day maintenance contractor) on communicating with residents who have failed to allow access for servicing, this ensures that if a resident makes contact for a day to day repair Robert Heath Heating are made aware of the appointment time and date so an engineer can attend at the same time.
- Robert Heath Heating also work with Mountjoy to try and ensure minimum disruption to residents, and whenever possible arrange joint visits to carry out repairs or servicing so the resident is only disturbed once.

*This model has been replicated in other areas of the business as outstanding good practice and similar results are being achieved elsewhere. We have demonstrated that by being focussed on the risk and taking ownership of the process we can maintain high levels of compliance in this vitally important area. The relationship with the partner contractor both in provision of management information and in delivering a quick response to urgent problems, means our results have been at a higher level than previously achievable. – Paul Smith, Operations Director*

**We have been able to achieve and maintain 100% LGSR compliancy for the last 3 ½ years. The real time web portal which is provided by Robert Heath Heating allows Southern Housing Group to monitor the performance of the programme on a real time basis. In the past we may have been provided with month end reports showing compliancy. The Robert Heath Heating system allows for constant monitoring, day and night by the Southern Housing Group administrators**

## Benefits to the Contractor :

As a specialist heating contractor, Robert Heath has recognised the importance of moving into the areas of installation and maintenance of renewable heating technologies.

However there is often a "Chicken and Egg" situation for contractors in that to win business in this area it is necessary to show experience. However, it is difficult to demonstrate experience until business has been won and contracts undertaken.

The real commitment of Southern Housing Group Isle of Wight to bringing new technologies to their residents has allowed them also to involve their heating contractor. Following Robert Heath Heating gaining MSC accreditation in 2011 and Southern Housing Group securing Renewable Heat Premium Payment 3 funding we have proactively developed a collaborative working party to allow vital installation experience for Robert Heath Heating.

Robert Heath Heating have been allowed to develop their own experience on the back of the commitment and experience of Southern Housing Group, giving them a much better opportunity of offering their new-found experience to other clients.



## Benefits to the residents and neighbourhood include:

Robert Heath Heating are able to deliver a service that is attuned to residents' needs, providing appointments not only during normal working hours but evenings and weekends. As a result, residents can expect a constant high level of care irrespective of spending restraints/pressures we face as a Housing provider.

Comfort and piece of mind knowing that their properties are safe.

Knowledge that efficient and effective heating systems don't break down, ultimately saving residents time and money.

Quick response times especially during winter months due to servicing being at a minimum.

Flexible appointment times to suit residents needs.

Local engineers with local knowledge.

Creating job opportunities in difficult economic time's remains an urgent priority, particularly as the Isle of Wight's catchment area is further restricted because of its isolated nature.

Robert Heath Heating has integrated community activity into daily operating practices, also providing, drinks, and goody bags to residents at fun day and social events as well as advocating the importance of allowing access for annual servicing.

Regular and annual servicing ensures that boilers operate at maximum efficiency which in turn ensures residents energy bills are kept as low as possible whilst providing maximum warmth.

Robert Heath Heating has also committed to providing training for apprentices from the residents community on the contract to give them life skills, and currently has an apprentice working on renewable technology installations.

By maintaining effective and efficient properties, we are helping to sustain tenancies and neighbourhoods that are safe to live in.

Contributing articles for news and views leaflets to promote gas safety and awareness.

YouTube safety films demonstrating gas safety, that all our neighbourhood partners can view.

## What improvements are experienced by the resident?

*"In 2009, Southern Housing Group and Medina Housing decided to jointly obtain a contractor for the servicing of gas installations in their properties. This would enable them to obtain a lower price and therefore better value for money. After interviewing several companies Robert Heath Heating was selected but with proviso that staff would be from the island thereby safeguarding the employment of local engineers.*

*When I became residents representative at the monthly meetings between Southern Housing Group and Robert Heath Heating, the improvements were very noticeable. Any problems which arise between the residents and Robert Heath Heating are speedily dealt with by the local supervisor Barry Farmer. Appointment letters are now sent out and followed up by phone calls from the local office 2/3 days before the appointment dates, also at this time you can usually be told which engineer will be calling. And to this end Robert Heath Heating are currently looking into the possibility of having engineer's identity card in Braille to help the partially sighted and blind residents.*

*Last Christmas/ New Year I experienced a problem with my boiler and had to call the service centre, within a very short time an engineer called to sort out the problem. Now this I call service.*

*Robert Heath Heating engineers now have larger stock on their vans so more jobs can be fixed on the first call, they are very customer friendly and now have their own staffing manning the call centre 24 hours per day. I must say, since the start of the involvement, things have improved 100%. One final comment, is that companies have to rely on the good will and work practice of their employees, to give a 1st class service. By Southern Housing Group putting the Robert Heath Heating contract forward for this award it is endorsing this that all employees are of the highest calibre"* [Margaret Marsh, Southern Housing Group Resident](#)



### A recent Contract Review Meeting

L-r Natasha Phillips, Property Servicesw Inspector, Southern Housing Group  
Amanda Morton, Surveying Manager, Southern Housing Group  
David Ware, Contract Manager, Robert Heath  
Barry Farmer, Isle of Wight Supervisor, Robert Heath  
Zoe Pennington, Isle of Wight Admin Co-ordinator, Robert Heath  
Margaret Marsh, Southern Housing Group Resident

## Any contribution to government efficiency/sustainability targets?

As the contract evolves and installations of solar thermal systems and air source heat pumps are now being undertaken, Robert Heath Heating has embraced the Southern Housing Group lead on the Isle of Wight in moving residents out of "Fuel Poverty" and reducing carbon emissions.

Southern Housing Group Isle of Wight has worked with Vaillant boilers for some considerable time, and has a uniformed approach to boiler installations, by taking this view Robert Heath Heating can have specific impressed van stock, and working with their supply chain partners, strive to maintain minimum delivery mileage for parts.

Low emission vehicles are standard at Robert Heath Heating, and they work in conjunction with Citroen fleet management using their carbon emission management software to ensure all vehicles are monitored for efficiency and emissions output. Where vehicles fall below the preset acceptable levels, Robert Heath Heating upgrade to ensure they keep their commitment to reducing carbon output.

Since the contract commenced, Southern Housing Group and Robert Heath Heating have replace over 250 inefficient boilers, with "A" rated energy efficient boilers and over 100 full gas central heating systems, thus assisting in moving residents out of fuel poverty and lowering carbon emissions.

## What were the financial and cashable benefits?

***The good practice and proactive management methods have generated significant resource and cost savings. The methodology for acting early on the service programme and targeting properties' due to expire' has transformed the access rates and the waste subsequently generated. As the compliance remains at 100% there is little or no follow on administration saving time and resource, there is no requirement for legal intervention saving considerable outgoing legal fees. By using the data intelligently, being pro-active and working closely with the contractor who is responsive and flexible, the results have been very impressive.***

***– Kevan Allaway, Maintenance Director***

There were no additional costs as a client and costs to the contractor had been included in the tender submission, any additional costs are part of the ongoing investment commitment by Robert Heath Heating.

For every boiler installed Robert Heath Heating give Southern Housing Group a copy of the appliance invoice, this allows us to claim back from the manufacturer £100 per boiler. The cumulative additional money raised from this has resulted in more than an additional 50 boilers being replaced.

All savings made through the contract are reinvested into our homes and any additional works as a result are carried out by Robert Heath Heating.

Any boiler failures that are under 10 years old are replaced on a split 50/50 cost basis. This saves money for both Robert Heath Heating and Southern Housing Group, and results in less disruption to our residents from return calls and breakdowns.

Southern Housing Groups commitment to this contract and to achieving 100% compliance, has helped Robert Heath Heating change its overall service delivery to all its clients. With the technical knowledge, drive, will to succeed and excellent communications any other organisation that follows this methodology and adopts this approach has the tools to succeed.

For more information please contact:

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