

Great Homes,
Great Neighbourhoods,
Great People

Healthy Heating

Submission from New Charter
Homes Limited

NHMF Best Practice Awards
2010

The best use of information
technology for maintenance.

Key Contacts

Introduction

New Charter Housing Homes part of the New Charter Trust Group was formed in 1999 as the new landlord to own and manage 14,500 homes transferred from Tameside council in Greater Manchester. With a turnover of £70million a year and a workforce of 880, New Charter is one of the region's largest registered providers of social housing, and is regulated by the Tenant Services Authority, a Government watchdog. By incorporating Gedling Homes, the Group now owns 18,600 homes. It was named in the Sunday Times Best 100 Companies to work for in 2009.

The transfer of stock brought with it the in-house Building Company who complete over 52,000 responsive repairs & 14,500 gas services each year.

New Charter has been operating an 11 month gas servicing cycle with notification being delivered to tenants 3 weeks prior to commencement on site. Prior to this project we had in the region of 60 properties (0.5%) with an out of date gas servicing certificate and we needed to improve the existing process, make it quicker, and more efficient whilst using fewer resources to provide the improved service.

The previous process, whilst it delivered a good performance, was time consuming from an administrative point of view due to the amount of paperwork & manual processing involved. This affected the whole process, from the client's administrative team to the contractor's supervisors, engineers, wages staff & the legal team. It led to non productive time of engineers & restricted our ability to improve performance and offer more appointments (which was creating access problems) without increasing the number of engineers. It was felt that in order to reduce this waste it was necessary to undertake a review of the whole system to deliver a more efficient, productive and improved service to the customer.

The key element to the revised process is the Personal Digital Assistant (PDA) handset which is hardy, robust and utilises industry standard Microsoft software as a base. Other organisations were using mobile working solution to gas servicing and 'off the shelf' products were available which would have provided a good method of working, but would not satisfy our whole systems approach to delivering improvement.

New Charter has always been at the forefront of using and developing new IT systems to support its continual improvement philosophy including its Document Management System (DMS). This electronic system is used to scan and store copy of paper and electronic documents rather than

previous manual process of filing. This award winning product (IM2004 Awards Premier Project) has been developed in partnership with BancTec and is now being successfully marketed to many large organisations including the NSPCC, the Employment Tribunals Service (ETS) and the Advisory Conciliation and Arbitration Service (ACAS) and others outside the field of Housing and it was essential that we made use of the benefits this software brings as well as our other existing IT systems & processes.

What is innovative about the service provided?

We made a decision to have a custom designed process and system built over our existing processes which were seen to be valuable & effective. The single solution we have developed interfaces with the existing maintenance database (Northgate), E-First Mobile, Internal Intranet & DMS.

This single process now completes all operations including live system time updates, e-mails to the client, property element updates, contractor appointments, engineer's payments & works order variations. It has flexibility to incorporate further service improvements for example smoke alarm testing and thermostat battery replacement. All this can be achieved with the one tool.

This has been achieved through the detail and planning of the software and database which an off the shelf system could not provide.

The handset software follows the Regulatory Process of servicing gas fixtures and fittings alongside holding our own Schedule of Rates (SOR) codes, individual property elements and the ability to record follow on work required, and notes for additional works or repairs completed in the property at the time of service.



What are the Benefits?

To the client & contractor

Data and information can be returned to and from the engineers on the street in real time. The benefits of this are

- Where immediate servicing is required to a 'troublesome' property where access has been difficult to gain – we can have engineer on site within the hour. Previously the engineers carried blank reports which they partially filled in on site and completed in the office, or they had to return to the depot to pick up the required certification with details, resulting in delays & further costs.
- Upon failure of an arranged appointment by the customer the servicing engineer returns the details simply and easily through the PDA. Whilst confirming time of attendance this also triggers an e-mail to the client to prompt further attempts to contact the tenant &/or start appropriate action without delay. Timeliness is a key component of the gas servicing process.
- The engineer does not need to attend the depot each day to pick up manual appointment sheets, this frees them up to attend more service appointments.
- All pertinent details for the address including current phone numbers are available to the engineer to contact the tenant when attending an appointment.
- All future appointments are visible to the engineer for the addresses on his PDA handset which allows planning of visits to surrounding addresses to coincide thus reducing travel time between jobs. This information was only previously available to the office based supervisor and repairs call centre staff who made the appointments.
- Appointments made by the engineer verbally with tenant or by card left at the address are recorded and visible to all staff either in Northgate notepad, E-First Mobile (EFM) Call Centre or PDA. These had never been recorded previously and now give us a more complete picture of the attempts to service addresses when court action or Environmental Protection Act (EPA) processes are required.
- Whilst introducing the PDA system it enabled us to change the process of issuing the letters to the customer, we release approximately 300 letters per week informing tenants of the servicing taking place. This has replaced the previous process of sending out 1200 letters per month. This has reduced the direct

pressure on the repairs call centre whilst enabling a tighter appointments process. This staggered estate based approach has resulted in us having more available diary slots which are now generally available within 2 days rather than anything from 2 days to 2 weeks previously. This timely approach has also resulted in a reduction in 'no access' visits.



Reduction in manual handling of documents and paper waste.

- No need to create & print approximately 14,500 Gas Safety Certificates (CP12's) per year to be supplied to the Building Company as Contractor. These were previously prepared, sorted, and batched for issue to the individual engineers and this has now been removed from the contractor supervisor's role. Saving over one hour per day.
- CP12's now automatically filed and printed (saving on previous manual process), similarly standard letters in response to 'no access' are system generated same day and posted within 1 day, again crucial time saving. We now print the service completion letter to the tenant on the reverse of the CP12 saving a further 14,500 A4 sheets per year.
- Appointments are live to addresses within the EFM centre and to PDA handsets where work is issued. Only one system is now used for recording appointments and all other updates to Northgate system are automated reducing the time taken at first point of contact for the repairs call centre.
- Appointments process for issue to engineer vastly reduced as no collation of the physical document is required and manual sorting, recalling and reissue of paper is now not required. This allows more appointment slots per day to be available for the customer which have now been increased from 20 to 25 per day after the first 4

weeks of operation. This should increase as demand is measured and the new processes bedded in.

- Removing the problem of official documents being rain damaged and defaced whilst being carried in poor weather.
- Collation of all completed certification and supply of all certificates on a daily basis to wages department (60 per day) is now replaced with a single customised report verified by the engineer and signed by the supervisor prior to going to wages.
- Follow on repairs were previously identified at the end of each working day as engineers returned the 60 completed work sheets, with a requirement for reading notes on each document. This is replaced with the system generated e-mail to the supervisor of follow on works identified by the engineer whilst on site. The supervisor then sends the full details of work required and codes for completion to the client who creates the new orders required on the same day thereby improving service to the tenant by reducing delays to works being carried out.
- Manual filing of paper copies of CP12's was stopped when Document Management System (DMS) was introduced however it was still necessary to scan copies, rename and sort the certificates prior to filing in DMS. This is now automated from the data input on site by the engineer where it is filed into the DMS and dropped into a folder for validation & printing prior to being sent out to the tenant. This has been a major improvement for the group in both time saving of hours but more importantly vastly reducing the risk of manual error and system failure risks. We operate on a basis of next day post out of certificates, taking approximately 30 minutes replacing a previous timescale of 3 days extending to possibly 9 days taking up to 7 hours a day for a single operator.
- Variations are now booked on-site by the engineer and an automated e-mail is returned to the client. This occurs at 5 minutes past the hour from 8:05 to 18:05 Monday to Friday the aim is to complete all jobs booked prior to 16:05 on the same day of booking and all others the following work day prior to 10.00. All variations are verified prior to passing details to wages by the contractor's supervisor. If any changes to the variation booked are required this is done post completion in the Northgate system. This again brings us the benefits of a much tighter timescale and a quicker process by approximately 50% over the pre PDA system with the likelihood of user error reduced by the detail provided on the initial notification and the use of cut and paste.

- Automatic completion of all none varied works orders, approximately 75% of the total as a general practice, removes a data inputting task from the contractors supervisor or admin clerk saving around 2 hours per day. Again this reduces the chances of user error and closing of incorrect addresses.
- After completion of all data on the handset for each individual property we have a batch of reports and in-house written system processes that allow automated updating of property elements in Northgate. Key parts of this are items like the boiler condition as it changes from year to year and this information can be used to assist in the planning of future planned schemes and monitoring day to day spend on properties with specific types of equipment.
- This also enables system generated letters to be sent out to customers reminding them of key information passed on by the engineers e.g. Cookers not fitted to current standard. More of these can be created as the circumstances require, possibilities are where manufacturers issue a recall or we need to do something 'special' to just one type of equipment
- Safety alerts for engineers are logged into the PDA's.

The whole system approach extends beyond the 'hardware technology' of the PDA's and was the stimulus to link through to the 'soft technology' of the legal process where we have supported the technological improvements with a wide range of process improvements that enable us to enforce action where tenant's for various reason's choose not to co-operate in providing access. These include:

- Holistic review of process shortening all timescales
- Standard documentation and legal proceedings packs
- Mail merging to speed up document production
- specially marked envelopes to ensure the letters stand out from general post.
- Additional standard letters sent before court hearing dates to remind tenants that service remains outstanding and to contact before court date.
- Detailed and thorough investigations into special circumstances e.g. if tenant in hospital or has a carer
- Block booking court time
- Hand delivery of final letters to ensure delivery/promote contact and identify empty properties
- Putting alternative enforcement options in place including possession orders and liaison with local authority to use Environmental Protection Act powers and providing the local authority with all the paperwork to ensure fast turnaround



Customer Benefits

- Tenants have been involved in developing our process and have expressed their confidence in our processes and systems, supporting our robust approach which gives them the peace of mind that not only their property is safe but the surrounding NCHTG properties are also checked and safe.
- The PDA process and EFM Centre enable us to operate in a timelier manner identifying and enabling us to respond more quickly to any issues raised.
- We do include secure passwords for Tenants so that they can be doubly sure that they are dealing with a New Charter Employee.
- Since the introduction of the PDA and EFM Centre we have introduced two new non gas servicing elements with little difficulty and positive benefits for the customer. The introductions are the replacement of the batteries in the new wireless room thermostats each year and the cleaning and testing of the hard wired smoke alarms fitted in of our properties.
- The tenants receive a clear and precise letter telling them of the week we will be servicing their property if they are available, improving from the 3-4 weeks time scale previously. Appointment slots are more readily available and we are able to meet the tenants requirements any day of the week including Saturdays
- The ability to contact the tenant on the same day as a missed appointment and in some instances to get the engineer to return on the same day to complete the service.

Testimonial from one of our tenants:

“Nothing was too much trouble, the New Charter people were polite, helpful and gave advice on the most efficient use of my central heating system.”

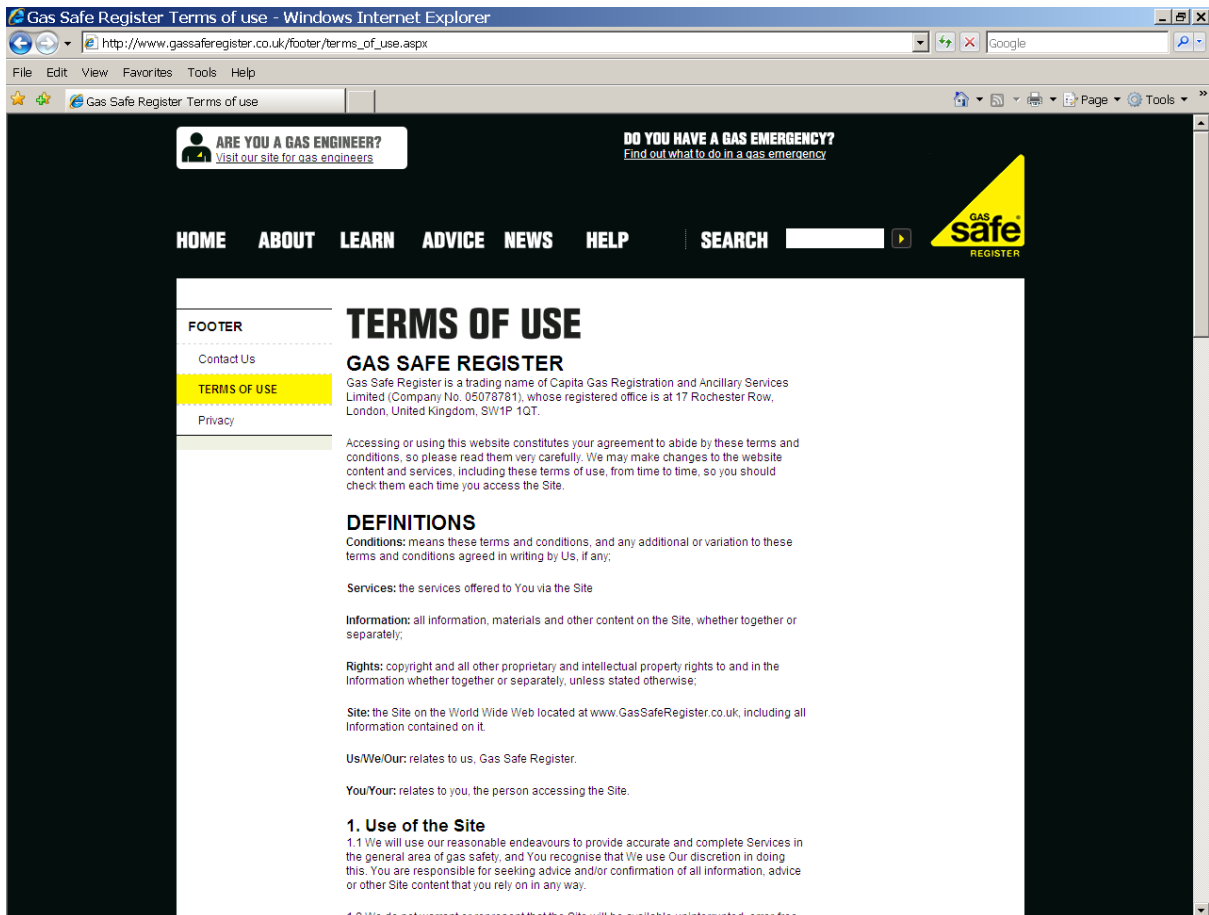
She went on to say, “I’ve been more than pleased with all the work carried out by New Charter and the professionalism and quality of its workforce”

What are the financial costs and cashable benefits?

- The final costs have yet to be calculated but are currently within budget with much of the system development being undertaken in-house. The PDA’s costs were £17k.
- In terms of cashable benefits, reducing the corporate risk to the group by successfully completing all gas services in time is difficult to quantify as savings are measured by determining what the costs would be in getting it wrong. At present time we have reduced the number of properties without a valid CP12 to fewer than 20 (still falling) and legal process was started on all of these prior to gas safety certificates going out of date.
- Measurable benefits are clearly to be seen in increased productivity by the engineers being more efficient in terms of time spent servicing with less time spent doing paperwork.
- Similarly the contractor’s supervisors & client’s administrative teams are similarly doing less paperwork, filing, printing etc and saving 30,000 A4 pieces of paper per annum also contributes to savings.

Future Improvements

Once the updating of the software on the PDA handsets themselves has been completed we plan to activate the phone and internet access facility on the handset to provide gas safe technical information, appliance fault finding diagnostics & parts identification to the engineers immediately.



The basis of the SoR recording and variations as well as the appointment and call recording processes could also be carried through to other areas of the group's programmes including day to day repairs and planned maintenance.

Transferability

Although the system was designed to interface with our main systems, it does this through a gateway system which can be modified to interface with any ODBC compatible database.

The technology has been designed in line with the demand from the whole system, taking into account engineers, tenants and colleagues from the whole organisation and partners to enable the effective delivery of Gas Safety follow up remedial and appropriate legal remedies.