

Review of Estate Services by the Customer Scrutiny Panel (CSP)

May 2021

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1. Introduction

- 1.1 The Customer Scrutiny Panel (CSP) was requested to review and feedback on how customers view Estate Services provided on their estates. The review follows on from an internal transformation of the service over the last year and has set out to test key service activity selected as important by the CSP to measure performance and customer expectations.
- 1.2 Despite completing this review during Covid restrictions all CSP members have actively participated carrying out estate inspections around their own and other local estates that are managed by mhs homes. All have complied with social distancing and wearing of PPE in line with government guidance. This demonstrates the commitment for the CSP to show that it is possible to carry out reviews safely.
- 1.3 Overall the CSP considers that Estate Services is still a work in progress to make sure that there is a consistent standard of service delivery across all estates and that there is greater two way communication with customers and in particular with colleagues both in Grounds Maintenance and Caretaking Services. It is clear that there is little, if any, integration or support with other mhs colleagues and a more joined up approach is needed to remedy some issues highlighted by this review which go beyond the basic role of estate services.
- 1.4 The key recommendations that the CSP would like to propose include:
 - Having a detailed service improvement plan that identifies service improvements required that are developed using customer feedback and listening to the needs and challenges faced by operatives and caretakers delivering services on the frontline
 - Giving the same credibility and opportunities to operatives to have training and career development opportunities so that they feel valued and can be encouraged in the same way that office based teams are
 - Using the Housemark Estate Services grading process alongside feedback from customers so that measuring performance is clear and used by mhs to ensure consistency of standards across all estates
 - Making customer engagement and insight a partnership approach by developing a new customer focused Estate Champion network that has clear Terms of Reference, open recruitment, training and a voice to help not only monitoring but influence determining estate improvements with management

- Communicating and sharing of information on work planned and completed with customers using a range of methods including annual estate inspections, surveys and virtual 'Tell us what you think' focus groups to really demonstrate listening and commitment to engagement
 - Celebrate the good things by having visible management visiting estates, job shadowing those working out on estates and making sure that Health and Safety and dignity of workers is given the same priority as office based officers
 - Enforcement needs to be promoted and used especially where specific estates are blighted by anti social behaviour
- 1.5 The CSP recognises through their interviews with office and frontline workers that there is a genuine commitment to deliver a good service and there is strong empathy for customers and their wish to live on an estate that is well maintained and that they can be proud of where they live. The key recommendations detailed in section 4 will help to address the areas of weakness that will ensure a quality service is consistently delivered on all estates.
- 1.6 The CSP would like to thank all the staff that participated with this review, and a special thank you to Dylan Smart from Communications for setting up our resident survey and promoting the survey to achieve a credible 168 customers completing the survey. A special thank you also to Zoe Marden for organising the interviews and helping to source information required.

2. What we did

- 2.1 The CSP together decided that their Estates Service review would investigate if:
- i. There is an effective sharing of estate monitoring / inspection / reporting feedback to inform the Executive and Board following recent internal service review and establishing new operating structure
 - ii. Reporting mechanisms and reporting on outcomes from Grounds Maintenance and Caretaking are meeting the needs and aspirations of management and customers
 - iii. Responsiveness to customer feedback
 - iv. Determine any impact on services as a result of Covid -19
 - v. How effective is the estate works reporting technology, procedures and templates used

- vi. Identification of opportunities for residents to be more involved with the inspection and reporting process on their estates
 - vii. Effectiveness of monthly reporting and feedback mechanisms used by the Estate Services team
- 1.2 The CSP members agreed to all taking on specific roles and activities for this review including:
- a) Deciding which officer/s to interview and finding out about their work role and views related to Estate Services and developing and writing bespoke interview questions - in total the CSP interviewed 15 mhs officers
 - b) Developing Customer Survey questions created by the CSP and then set up on Survey Monkey by mhs homes and sent to all customers with an email address to ensure that the customer voice would be heard loudly through this review
 - c) Creating an Estate Inspection reporting template developed and used for each estate site visit to record observations supported by photographic evidence. (Appendix A) - used to inspect 12 estates
 - d) Allocating roles and responsibilities to all CSP members and agreeing feedback methods to use
 - e) Scheduling Focus Groups open to all residents
- 2.3 The survey reached out to 168 residents of which 75% of respondents lived in a street property and 25% on an estate.

3. What We Found – Our Findings

3.1 It is important to focus on the positive things as well as the negative because the review needs to be balanced and objective.

3.2 **The positive findings include:**

- a) The new restructure and recruitment of new Managers and Operatives is complete and new working programs / training complete
- b) The service has been provided during Covid and a thank you bonus of £500 was paid to each person and this was appreciated and welcomed
- c) Estate Services has been highlighted in the mhs strategy and customer charter as being an area for greater resident engagement
- d) All staff that we interviewed was confident to be honest and happy to share views and ideas to help improve the service
- e) PDA reporting helps ensure that work completed is recorded and photographic evidence collected
- f) Training around Health and Safety and equipment completed
- g) Investment in new equipment to carry out work
- h) Commitment to review and establish a new Estate Champions role on all estates
- i) New home developments are being designed to reduce future Ground Maintenance needs but there is still a greater need to involve Estate Services to design out some of the key issues that result in longer term operating charges
- j) There is a commitment from Executive Director level and the Board to ensure that estates reflect the high quality services that mhs are working to achieve
- k) The survey confirmed that 32% of respondents stated that Estate Caretakers provide an excellent service
- l) 59% of respondents to the survey confirmed that they know how to make a complaint

3.3 **The negative findings include:**

- a) There has been no customer feedback to help shape the service to meet customer expectations and aspirations

- b) A lack of consistency in service and standard across all estates
- c) No formal estate inspections completed with customers
- d) Operatives and Caretakers have not been involved with shaping the service and would have welcomed having a voice as changes in their view have been made by Managers only, of which some are new to mhs homes, and have limited understanding of the estates
- e) Although there has been an increase in budget and resources for Estate Services this has not been shared with Operatives and Caretakers and they believe that no additional resources have been given and that they are expected to do more work with no extra resources
- f) Communication and seeking feedback from customers very poor
- g) Estate Champions only realised that their role had been dropped when completing this review and not formally advised so were left annoyed that nothing was happening
- h) No customer estate inspections
- i) No feedback from estate inspections shared with customers
- j) Safety issues picked up from CSP inspections were basic issues that should have been previously picked up by Caretakers or Grounds Maintenance Operatives
- k) Complaints only get resolved, according to customers, if they get a Councillor involved
- l) A lack of joined up working across all services in mhs homes and sharing of information
- m) Leaseholders consider that charges for Estate Services have significantly increased but the number of grass cutting visits etc. not increased and need more information
- n) Lack of training, development and career opportunities offered to those working in Estate Services
- o) There are concerns that basic access to hot water and toilet facilities on some estates is a Health and Safety issue especially for being able to clean communal areas and prevent the need to travel to use toilet facilities in Supported Housing
- p) There is a view that as Grounds Maintenance teams work in pairs and have a limited time to complete tasks that quality of work has been dropped and this is made worse by traveling distances

to new sites. Also, the new pairing structure has adversely affected friendships and team working

- q) Noticeboards are not kept updated, some are not accessible due to lack of keys and there is no information related to Grounds Maintenance and Caretaking Services

4. Key issues and recommendations

Number	Issue	Recommendation
1. Management	a) There is a lack of joined working between Grounds Maintenance, Caretakers and Customer Services	Having a quarterly virtual meeting to share feedback and key issues to help build working relationships and resolve issues together.
	b) There is a sense that office based staff do not visit estates and the only Line Managers that are visible are Grounds Maintenance Line Managers.	Have an agreed plan of which Officer will visit monthly and have a site visit sheet to complete so that the visit has a clear purpose and recorded feedback. Need to ensure all estates receive a visit per year.
	c) New Officers / Managers do not understand the local environment and communities and make no effort to build their understanding and knowledge to help with decision making and service delivery	All new Officers should as part of their induction have a tour of the key estates so that they build their local knowledge and Grounds Maintenance and Caretaking Line Managers should spend 2 weeks in the field with operatives as part of their training.
	d) There is little or no communication between Grounds Maintenance and Caretakers which needs to be changed so that all are working and making decisions based on shared feedback and aspirations.	There should be a sharing of work schedules, complaints, enforcement issues and estate improvement suggestions and proposals. A joint newsletter may help to address this with an Estate Service away day to share ideas and build relationships.
	e) Empowering staff to go the extra mile and ensuring that blame is not attributed to genuine desire to improve estates and lives of residents.	Both new and long serving Estate Maintenance and Caretakers felt strongly that innovation and feedback from those working externally was not sought or embraced and there is no flexibility because every second has to be accounted for on the app. Is there not

		an opportunity for service improvement suggestions to be on every agenda for team meetings?
	f) Office staff are still hiding from Covid and monthly meetings with Operatives has stopped creating a sense of isolation.	Monthly meetings should be happening using virtual technology such as Zoom etc. The CSP managed to hold virtual interviews with Operatives successfully.
	g) Personal development and succession planning is seen by Operatives as an opportunity to progress their career. All the emphasis is on office based staff. This is affecting morale and feeling valued.	Ensure that staff appraisals are used to identify and help those that have the capacity and inclination to create a wider career with mhs homes. Ensure that as and when job opportunities are being recruited to that the information is shared with frontline operational staff.
	h) Having the right equipment to do the required job/tasks by Operatives is critical and decisions on purchasing is in the main made by Managers with no feedback from those who are to use the equipment.	mhs homes has invested in equipment, which is recognised and appreciated by Operatives, but they feel that if they had been asked about choices they would have saved money, got the right tools and been able to work more effectively. When making purchases ensure that those who will be using them are given an opportunity to share their experience.
2. Operational	a) There was a consistent view expressed that Operatives were having to work to productivity targets that are solely based on quantity and not quality resulting in more complaints from customers as work is completed to a minimum to comply with time allocated for the work.	Review both informal and formal complaints to determine whether the level and range of complaints has increased and whether they are around a reduced quality of work finish. Line Managers' need to randomly job shadow to review time allocation for tasks and work required to provide a consistent standard.

	<p>b) There is concern that enforcement for fly tipping, ASB etc. is not proactively managed and that it is accepted that caretakers will continue to spend time dealing with issues that could be resolved by enforcement.</p>	<p>There needs to be a joined up approach between those that are on the estates and those that are office based so that messaging is strong to residents that enforcement will happen. This may be assisted by the reintroduction of resident estate monitors working closely with Officers / Operatives etc.</p>
	<p>c) Notice boards on estates are not kept updated and information advising customers of grass cutting etc. not shared. It was confirmed that notice board keys were often not available.</p>	<p>Caretakers expressed a keen interest in updating noticeboards and ensuring that residents know whom to contact and how, works planned, and estate events. Another option may be to install electronic screen monitors in all blocks so that messaging can be updated centrally and be more relevant and timely removing the need to visit sites to put up information. The cost of screen monitors has greatly reduced and is an affordable and cost effective way to keep residents updated about issues such as fire safety, communal repairs, estate maintenance etc. A pilot could be tried on a couple of estates and the feedback used to evaluate the success and making sure that information is appropriate. From other organisations that are using rolling screen monitors they have found customer satisfaction has increased, reduction in the need for letters, newsletters and reduced complaints.</p>

	<p>d) Although PDA's are seen as helpful they are also viewed as time consuming and not easy to update. The PDA needs to be able to record fly tipping because currently this has to be reported separately. This means that Line Managers are often unaware of the number of requests being made.</p>	<p>It would be helpful to review the way information is recorded now that the PDA has been in use and identify any additional training needs. Users need to be actively involved in the review because there was concern that the system was developed with no input from those that are having to use daily.</p>
	<p>e) Not having hot running water and toilet facilities for Estate Caretakers and Grounds Maintenance staff is considered a Health and Safety issue. This has been made worse by not being able to use facilities at Supported Housing schemes during the pandemic. However, to clean communal areas etc. there is a need for hot water to do the job effectively.</p>	<p>When estate improvements are being considered it would be helpful to review access to running hot water and toilet facilities for Operatives. Consideration for new developments to include appropriate facilities. It was noted that some estates have storerooms but if more women were to be encouraged to take up these roles providing of basic facilities would be a priority.</p>
	<p>f) Operatives consistently expressed concern that resources had been cut, that no additional resources had been provided to meet the expanding portfolio of homes and that investment was only in management.</p>	<p>The CSP has been provided with information that considerable financial investment and providing of new roles has happened in 2019/20 but this information has not been communicated to Operatives to dispel inaccurate reporting.</p>
	<p>g) Operatives reported that gates and railings that made cutting grass more time consuming often hinder work. The CSP learnt that new developments are being landscaped to minimise</p>	<p>There needs to be feedback from those delivering Grounds Maintenance services into development for new homes so that potential issues around gated estates and structures are minimised.</p>

	<p>maintenance, which will be positive going forward.</p>	
	<p>h) Training on how to use specialist equipment is limited and operatives feel that there is a need to open up training so that individual skills are developed.</p>	<p>Develop a training schedule that is shared with Operatives.</p>
<p>3. Meeting customer expectations</p>	<p>a) There is an overall view from 167 customers that communication, consultation, and making changes and improvements on estates is currently not seen to be happening.</p>	<p>As proposed in the mhs strategic / operational plan, the re-establishing of Estate Champions will provide local eyes and ears and regular feedback both to mhs homes and customers. There should be a publicity campaign and consultation to shape the development of Estate Champions and create a recruitment process that ensures that members cover all tenures and demographics.</p>
	<p>b) Estate inspections have not been completed and residents in the survey have indicated that opportunities that they would like to receive information about when inspections are planned and to receive feedback on findings and remedies that may be required to resolve issues. Notice boards are reported as not containing current information and some Caretakers reported not having keys to be able to update and place current notices.</p>	<p>Prepare an annual schedule of estate inspections to be attended by mhs staff and residents. Dates and timings to be consulted on so that residents have an opportunity to participate. Once Covid has passed, make these events an opportunity for resident engagement and gathering feedback about the estates but also any key concerns that residents may have. Reports from estate inspections to be shared on noticeboards and on the website. An estate newsletter could be provided so that those that may not be able to leave their home receive the same information. Use of a video</p>

		of the estate walkabout may be another way to share information as this fits in with the mhs digital strategy.
	c) Grading of estates- there are a number of potential options to use and currently photographic evidence of completed work is captured as part of the signing off process for Grounds Maintenance Operatives. Customers and potentially estate monitors could be trained to be able to record estate condition alongside Managers completing independently so that there is a comparison.	Review the option for using the Housemark Estate Grading System and training to use for Managers and customers. The scheduling of the inspection and grading will highlight areas that customers reported as having litter issues, ASB and more difficult estates to manage. Work with the CSP to help develop and test a bespoke system using the Housemark as a basis but be open to shaping to meet mhs needs.
	d) Customers have expressed views about the place where they live as being important. Estates are what customers and the wider community actually use to make an overall view of mhs as a landlord. An annual survey should be completed of all residents and estate services and condition should be measured. This will ensure that all have the opportunity to have a voice.	Create an annual survey to go to all mhs customers that identifies estates specifically alongside overall customer satisfaction for services delivered. Use the feedback from the survey and estate inspection reports to identify estate improvements. This will demonstrate that estate improvements and allocation of funding is considered from both a customer and Officer perspective.
	e) Antisocial behaviour is seen as a key issue to customers and that enforcement is not seen as happening. There is a view that 'naming and shaming' of those that participate with fly tipping etc. will have a	There should be more messaging to help prevent and reduce anti social behaviour. Those managing tenancies need to support the Grounds Maintenance and Estate Caretakers to identify, warn and take action against those that

	<p>positive impact. Although it is noted that rubbish collection is regular on estates but dropping of litter is not helped because of a lack on bins on estates.</p>	<p>continue to make the life of residents difficult and make their estate a less favoured place to reside. Customers want to see a proactive not responsive approach and prevention by publicising a zero tolerance will make a difference.</p>
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5. Conclusion

This review has highlighted that estates are considered an important and high profile service for mhs homes. The enthusiasm for making estates a great place to live is a priority for mhs, customers and members of the CSP.

The recommendations need to be considered to address the key areas identified for improvement to build on the ambitious commitment of mhs homes to deliver effective high quality services, homes and environments. There are many positives to recognise and the journey for change and further improvement can be achieved by opening up to customer engagement, estate inspections and monitoring, and establishing a new estate champions network to support Officers and customers.