

Committee	Audit Committee
Date	11 th December 2013
Title of report	Building Maintenance Unit [also known as the Housing DLO] – update of progress made against Action Plan
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Portfolio Holder	Councillor Kenneth P Hughes

1.0 Purpose of Report

1.1 This Report updates Members of the Audit Committee on progress made to transform the services delivered by the Housing Services' Building Maintenance Unit [BMU], since the last Report presented to Committee 24th May, 2012.

1.2 Background

A good and efficient repairs and maintenance service is one of the most important services provided by the landlord. The service is likely to be the one most tenants use, is highly valued by tenants, can have an impact on tenant's quality of life and is likely to be a key contributor to tenants' satisfaction with their landlord as a whole.

The BMU has an annual turnover in the region of £4.98 million (£5.2 million 2011/12 figures)], with a workforce of 45 operatives serving approximately 3,800 properties. The BMU also contract work to 27 Sub-contractors providing approximately 70 individuals.

1.3 Current Functions

The Building Maintenance Unit (BMU) carry out works on the following functions:-

- a) Day to Day Responsive Maintenance on average 25-30 jobs per day with 50% being categorised as Emergencies.
- b) Pre-Painting Repairs
- c) Disabled Adaptations
- d) Void Property Maintenance / Refurbishment averaging 10-15 properties per week
- e) Gas / Oil appliance Annual Servicing, 350 properties per month.
- f) Gas / Oil Appliance Repairs
- g) External Works

- h) Car Park Maintenance
- i) Welsh Housing Quality Standards Year 6
- j) PAT testing for the majority of the Councils departments.
- k) Minor Maintenance for Public Protection and Waste Management
- l) Minor Maintenance for Social Services.
- m) Solid Fuel Installation, Servicing and Repairs
- n) Fuel Switching Programme

1.4 The management of the BMU transferred over to Housing Services in February 2012.

2.0 Service reviews

2.1 Wales Audit Office Advisory Review

Shortly after transfer of the Unit to Housing Services, an advisory review was requested by S151 Officer and Head of Housing Services from the Wales Audit Office, which reported in April 2012.

2.2 Conclusions from the Wales Audit Office Review

The Welsh Audit Office review of the BMU concluded that '*...the Council cannot demonstrate that its repairs service supports delivery of its strategic priorities, that the BMU's activities were based on meeting compulsory competitive tendering requirements which is now out of date, there was no consensus over what the service should be aiming to achieve, the Council cannot demonstrate that resources are being used effectively and that value for money is being achieved, there is no overall performance reporting framework in place and weaknesses in validating financial information means the Council is unable to fully evaluate its responsive repairs service*'.

2.3 The findings and recommendations of the review were reported to Elected Members through the Scrutiny Committee, Audit Committee and Board of Commissioners during May 2012.

2.4 Solutions for Housing Review

In June 2012, the Head of Housing Services commissioned a further detailed review on the BMU, through a specialist company, at the time were also engaged by Denbighshire Council to transform their DLO service. The consultant involved,

agreed to undertake a review of the Services in Anglesey. The review was undertaken during July and August 2012 and a report was issued in October 2012.

2.5 The key objectives for this review were:

1. To conduct a comprehensive Service and Value for Money review of Anglesey Housing's BMU to establish the current level of Service and VFM being offered to the Landlord by the BMU;
2. To identify a wide range of opportunities to improve the economy, efficiency and effectiveness of Anglesey Housing's BMU;
3. To make appropriate recommendations to improve the service and VFM, from easy 'quick wins', to more substantial changes in service delivery.

2.6 The Service and Value for Money Review of Anglesey Housing's BMU revealed that the service is achieving the level of a **one star service** (i.e. a fair service) but has **poor prospects for improvement should the current client/contractor split be retained in its existing form.**

2.6.1 The key recommendations

A number of recommendations were made as a result of both reviews and these have been included within a SMART action plan that accompanies this report at **Appendix 1**. The appendix also notes progress to date against each task and work stream.

A top ten list of priority recommendations, ranked in order of priority, is outlined below and it should be noted that most of these included recommendations for both the client and the contractor elements of the repairs service due to them being inextricably linked:

1. **Client/Contractor split** – There is an urgent need to review the current client/contractor split which is a major weakness and will prevent the service from moving forwards if retained in its existing format. There are several options available to Anglesey Housing ranging from retaining a split between the client and the contractor but working with partnering principles, to a fully merged client/contractor repairs service (which is the model that most of the three star excellent organisations use). Anglesey Housing needs to evaluate each of these options within the context of its new strategic direction for the Housing Service and establish the 'best fit' option for its repairs function.
2. **Performance** – closely linked to the above, is the need to ensure that performance information, benchmarking data, customer demand information,

customer satisfaction and complaints information is routinely shared with the BMU, within a revised culture of team-working, continuous communication and improvement. To develop a 'balanced scorecard' approach to performance management i.e. cost, quality, productivity and customer information. To also ensure that a comprehensive approach to collecting customer satisfaction information is adopted in order that this is used to inform and improve future service delivery. Performance targets should be mutually agreed.

- 3. Financial management** - To strengthen existing financial management arrangements to ensure that they are fit for purpose for a £5.2 million annual turnover business. That budgets be developed for the BMU (with BMU involvement) and that the existing trading account is revised into a more 'user friendly' format. That all non-finance managers within the client and contractor sides of the business with budgetary responsibility should be provided with financial management training and that commercial acumen is increased.
- 4. Information Technology** – New systems are being implemented however in our opinion Housing Service is trying to do too much in a short space of time which exposes the service, and within it the BMU, to a significant level of risk. We recommend that the proposed phasing of the implementation should be reviewed as a matter of urgency based on a 'must/should/could' priority rating. We also recommend that in line with best practice, that appropriate contingency plans be developed with the BMU team, to ensure that the service can still be delivered even if the new systems fail to work efficiently, or indeed, at all.
- 5. Contract Management/Housekeeping** – to implement a comprehensive schedule of contract management/housekeeping tasks to ensure that the systems of the BMU are always up to date, accurate and form a sound basis for informed decision making.
- 6. Gas servicing** – To revise the arrangements for the gas servicing programme to ensure that gas safety certificates are delivered within statutory time limits.
- 7. Pre-inspections/Post-inspections** - to reduce the current high level of pre-inspections down to industry good practice levels of 10%. To also reduce the level of post-inspections to prevent the current duplication of effort in this area.
- 8. Lettable standard** – to review the minimum lettable standard (i.e. where works can be done at a property in excess of this) and replace with a

common lettable standard where all voids are returned back into management to the same level (unless management have agreed due to being hard to let etc.), thus preventing customers from experiencing different quality levels.

9. Customer Service – that a Repairs Policy be developed, that published Service Standards be revised to best practice levels, the removal of current discrepancies between targets used by BMU and the main service, that customer groups properly scrutinise the service and are involved in its improvement, that all customer handbooks, guides and literature are reviewed to best practice levels. We recommend that the BMU has involvement in the development of these in order that it can truly ‘put the customer at the heart of its business’.

10. Medium Term (3 to 5 year) Business plan – that a medium term DLO business plan be developed and supported by a medium term financial plan. This will ensure that the BMU is achieving strategic alignment with the Housing Service, is moving forwards in a planned manner, is financially viable and has a clear route map to upper quartile/decile levels.

2.7 Key findings from the Internal Audit Report

2.7.1 The third review to be commissioned, followed from the above Solutions for Housing review, as a result of the identified risks for the Housing Services, was commissioned by the Head of Service, Housing, from the Internal Audit Team concentrating on the BMU’s Procurement Arrangements. This advisory Report was received at the end of October 2012, and copied to the S151 Officer.

2.7.2 The review found that ... *‘the BMU had no procedures in place to ensure that procurement undertaken with the BMU was in line with the Council’s Contract Procedure and Financial Procedure Rules... no evidence of compliance with contract Procedure Rules in relation to tendering and contracts.’*

2.8 A comprehensive action plan was put in place following three critical reports. A high percentage of improvement workstreams have been progressed during the past 18 months, with only a handful where little or no progress made. According to self-evaluation by staff members, the following gives a picture of delivery of the action plan.

61.5% of tasks have been completed

32.5% of tasks in progress

6% no progress made to date

3.0 Progress

3.1 The key areas identified for improvement progressed are as follows:

3.1.1 Client/Contractor split

Limited progress has been made, however this will be driven forward as part of the next phase of modernising the Service. This is an area of risk for the Service, together with the lack of Officers who have experience of managing change to drive this through.

3.1.2 Performance

Orchard: Performance is monitored through the new Orchard computerised system, where performance reports can be created at any time through Business Objects. Proactive use is made of both Housemark and APSE benchmarking performance data and data around costs, throughput and quality of services delivered is reported and discussed monthly as part of the Housing Services' Balanced Scorecard.

During the year, there is clear evidence showing that void repairs performance has improved, as has all gas, solid fuel installation repairs.

Trackers placed on the vehicles of gas engineers has provided a vital tool to ensure efficiency of existing resources, together with van stock, directing the nearest qualified contractor to attend jobs, and without having to return to the Depot for stock.

3.1.3 Financial management

Since the 1st April 2013 the BMU is now a Cost Centre whereby all works carried out on behalf of Housing Services is charged at cost, it is envisaged that this will in time yield savings. Substantial work has been undertaken to improve financial management information and realistic budget setting. More work will be undertaken to refine budget setting as Civica beds-in. A reality check review has been commissioned December, 2013 and the Head of Services believes that much more efficiency savings can be delivered by maximising the use of the new IT system and introducing different ways of service delivery.

Schedule of rates: A new M3 schedule of rates have been introduced, but are currently under review due to the need to revise the standard minute value [SM Value] for not being suitable and fit for purpose. BMU and Housing staff are working in partnership to look and revise all of the rates. This is a long drawn process as all the rates need to be looked at individually.

3.1.4 Information technology

The new *Orchard Housing* system was introduced in November 2012 but not without its teething troubles. This was to be expected. As the BMU are now a cost centre all charges are at cost. It has been a long drawn process to have the cost centre facility set up within the system as support from Finance Services has been limited during the past 12 months, as the Service Accountant was also seconded to the Civica Project Team. Now these have been introduced the BMU are well on the way with charging completed jobs. Due to the timescale of installing the necessary data in respect of the cost centre, there is a backlog of charging to be inputted into the system. BMU admin staff are currently working to reduce this backlog.

Ordered work other than emergency work has been set up to print as batch jobs at 12noon and 4pm each day. These jobs are then categorised by the controller who will determine which of the trades staff or contractor are available to carry out the work, these are then entered into the appointments calendar for each individual allocating a time slot (30min slot) depending upon the SM value of the task ordered. Daily diary appointments are made in advance and staff and contractors are aware of the day that both an AM or PM appointment has been made and the customer informed. These only apply to jobs that are ordered on a routine priority. With emergency work these are attended to within 4 hours and tenants are informed as to when the trade will call using the contact details provided. This will be refined with the introduction / roll-out of the new hand-held devices, currently being piloted by some contractors.

3.1.5 Contract Management/Housekeeping

Procurement Consortia: Draft strategy documents have been prepared for the Procurement of materials for stores, and discussions are in process with Procurement for Housing together with support from the Council's Procurement Manager with regards to benchmarking. A report is expected soon from the company and Assistant Operations Manager of the BMU. Documents for the procurement of contractors are currently being prepared.

3.1.6 Gas servicing

The BMU carry out annual servicing on all oil, gas and solid fuel heating installations. This amounts to 3210 installations approximately 350 per month. Servicing of heating installations is carried out during the period April to November.

Gas Installations 2426 (April – October)

Oil Installations 247 (April – July)

Solid Fuel Installations 537 (April – November)

Servicing is completed 100% during these periods.

Following on from the Solutions for Housing recommendations the following improvements to the servicing process have been introduced:-

- a) CP12 Expiration dates have been added to the monthly databases
- b) CO alarm expiration dates have been added to the data bases
- c) All servicing appointments are scheduled by the BMU
- d) Servicing is scheduled for the first two weeks of every month to allow for the second chance and section 54`s processes to be completed prior to the current expiry of the CP12.
- e) Refusal properties are referred back to the BMU at the end of each day for quicker implementation of the second chance and section 54`s process.
- f) The number of installations will increase over time as new systems are installed. Once installed the new systems are added to the BMU`s annual program.
- g) Following a comparison of service costs undertaken it was deemed that the BMU charges were competitive to that of one of the major national utility companies.

3.1.7 Pre-inspections/Post-inspections

Recommendations have been implemented, and are reviewed to ensure quality of services is maintained, by the Senior Maintenance Officer.

3.1.8 Lettable standard

Recommendations have been implemented

3.1.9 Customer Service

All BMU staff have been issued with standard uniform, and a new code of conduct for employees has been developed in conjunction with tenant groups and staff members and introduced. A new freephone number has been issued, and all staff have recently attended customer care training.

The process of reviewing customer handbooks is progressing.

A customer satisfaction survey is left at every premises with a stamped addressed envelope for returning, analysing and reporting of service quality. A team of Tenant Inspectors will in quarter 3 be spot-checking the works of the BMU contractors involved in turnaround of void properties against the newly adopted Lettable Standards document.

3.1.10 Medium Term (3 to 5 year) Business plan

Work has commenced with the business plan and will be informed by the outcome of the Options Appraisal and Service Review commissioned by the Head of Housing Services, following the retirement of the Operations Manager, in November 2013.

4.0 Current BMU risks transferred to the Housing Services' Risk Register

- Lack of Officers experienced in implementing change
- Procurement and contract rules – lack of progress made by Officers
- Failure of new IT system
- Resistance to change e.g. introduction of more flexible working hours
- Significant overspend
- Health and safety – lone working
- Increasing levels of unpaid re-charges

5.0 Conclusion

5.1 Positive progress has been made over the last 12 – 14 months in most of the identified areas for improvement, which has been driven by a positive attitude from staff who wished to see the Service improved and shared the drive to turn the service around. This determination and shared vision has resulted in improved reputation and Performance. There is acknowledgement that there is more work to be done, and will follow as part of the review of progress reported through self-evaluation, and which will be subject to an independent reality check by the appointed consultants.

6.0 Next steps

6.1 Options appraisal and independent evaluation of progress made against action plan February 2014, and will be presented to the Council's Executive Committee in March 2014.

6.2 Progress of implementing the chosen option will be reported to the Service Excellence Transformation Board, and a formal project management approach will be adopted.

7.0 Recommendations

7.1 Members are asked to note the progress made to date to transform and modernise the BMU Unit, through the delivery of the action plan.

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21/11/13

Appendix 1

Action Plan with progress narrative

Background Papers

Wales Audit Office Review, June 2012

Solutions for Housing review, October 2012

Internal Audit review, October 2012

Repairs & Maintenance Action Plan

Action	Objective	Timescale	Remarks	% completed
1. Corporate Image / rebranding				
a) Restructure	Efficient working & Financial Savings	March 2014		
b) Rebranding	Create a new Identity	March 2013	Launched via Newsletter	100%
c) Uniform	Professional workforce	March 2013	Completed, new uniform issued March 2013	100%
2. Financial Management				
a) to strengthen financial management arrangements, introduce a new trading account format and provide managers with financial training	Budgets produced for the BMU Trading account format revised Monthly management accounts with variance analysis Forecast outturns Training provided	April, 2013	Cost Centre implemented June 2013. Delay experienced from finance setting it up in Civica.	100%
b) to decide whether cost centre approach or trading account format	Decision on future of financial management	March, 2013	Cost Centre set up and implemented June 2013	100%

Repairs & Maintenance Action Plan

	made.			
3.Schedule of Rates				
a) Standard Minute Value (SMV)		March 2013	Working on revising the SMVs. Progressing on Schedules that are commonly used. Remaining Schedules and SMVs will continue to be amended but will take time to complete the whole M3 schedule of rates.	90%
b) Cost Rates		March 2013	Currently working on amending the SM values and cost rates in the M3 Schedule of rates. Nearing completion, only joinery tasks remaining	90%
c) to introduce a condensed version of the proposed new schedule	Condensed schedule in place	November 2012	Completed November 2012	100%
d) Job Costing Rates – to ensure that the correct job costs exist and are in alignment with budget, in order to compare directly with SOR	Job costing rates reviewed	December 2012	Completed November 2012	100%

Repairs & Maintenance Action Plan

4. Mobile working Solution				
a) To introduce and implement the mobile working solution for Repairs staff	Efficient working & Financial Savings	April 2013	<p>Delay in implementation of mobile working. Only recently a decision was made on the hand held units. The feasibility of the units that ICT have provided is now under assessment by both BMU and Housing Service officers. It is only on completion of this assessment that a final decision on the type of units to be purchased and implemented can be made. Need to ensure that the units purchased are fit for purpose.</p> <p>3 Mobile devices issued 1 for SHO, 1 for BMU electrician and 1 mobile tablet for Technical Officer Inspector.</p> <p>Devices currently being evaluated as to ease of use etc. ICT to load SVS on the devices within the next 2 weeks. Once this has been done commencement of sending work via mobile can</p>	80%

Repairs & Maintenance Action Plan

			commence .	
b) Trackers –to ensure that new hand held technology incorporates tracking system	Hand held technology has trackers embedded	Sep 2013	Tracking not part of PDAs but tracking has recently been introduced in vehicles Trackers currently on 50% of Vehicles. Trackers fitted to 70 of the Councils vehicle fleet which from information from the Fleet Manager the remaining BMU vehicles will be fitted with trackers as and when funding becomes available and only on vehicles of a certain age. Vehicles due for exchange will not be considered.	100%
c) Opti Time – introduction of opti time system for mobile working solution	Efficient working & financial savings	October 2013	Under consideration for future mobile working, with the possibility of moving forward in aprox 18 months time. Phase 3	0%
5. Access, customer care and user focus				
a) How effectively does the organisation communicate and consult with its service users and stakeholders about stock		MARCH 2013	Extensive consultation in relation to WHQS and establishing work priorities.	100%

Repairs & Maintenance Action Plan

investment and asset management.			Regular updates on capital expenditure via Tenant Newsletter. Joint tenant/officer panel set up to monitor WHQS refurbishment programme.	
b) How easily do service users access the service.		MARCH 2013	An audit of the Customer Care Charter was carried out by Tenants during June/July. The auditors were happy that officers were easy to speak to and dealt with queries promptly in line with the Customer Care Charter and that the new free phone number for Repairs and Maintenance was a good idea.	100%
c) How clear and comprehensive are service standards from a service user's perspective.		March 2013	Service standards are reviewed and updated regularly, a recent update has taken place to the Customer Care Charter and the Repairs and Maintenance Factsheet.	100%
d) How does the organisation respond to service users?		March 2013	Môn Tenants and Officers Voice meeting are held every quarter. The TP Team also visit TRA Groups every	100%

Repairs & Maintenance Action Plan

			quarter.	
e) What service user satisfaction has been achieved through stock investment and asset management.		March 2013	Consistently high service user satisfaction rates recorded throughout WHQS programme implementation.	
f) Code of Conduct – to deliver a specific version for BMU	Tenant consultation Code of conduct in place	Jan, 2013	Code of Conduct for employees has been agreed and accepted by all concerned.	100%
g) Tenant involvement – to ensure that learning from the WHQS extends to the remainder of the BMU.	Learning passed to remainder of BMU service	April, 2013		
h) Contact with incoming tenant – voids team “customise void within lettable standard parameters	Incoming tenant able to influence void	March, 2013	Minimum Lettable Standard set by tenants. Audit to be carried out in January 2014. New Lettings process commenced in September 2013 to allocate properties within notice to quit period. Giving new tenants the option	100%

Repairs & Maintenance Action Plan

			of viewing their new home. New tenants are visited by the Area Inspector within 10 Days of the sign up.	
i) Incentives – Housing Service to consider whether incentives could be introduced for tenants to leave properties in good condition	Incentives considered	June 2013	outstanding	0%
j) Customer satisfaction- to set appropriate targets for receipt of customer satisfaction information and consider incentivising their return. To set a minimum acceptable level of satisfaction. To make more clear the information provided in graphs.	Targets in place Incentives considered Acceptable level of satisfaction agreed Graphical information made clear	March, 2013	New system has been implemented, contractors issue satisfaction forms at job completion stage of all works carried out on tenanted properties, aim for a response rate of 80%. Incentives to be considered if return rate proves to be low. Minimum level of 'Overall quality of repair work' set at 95%. Simple, year to date reporting by way of graphs or report sheet produced and available via the shared	95%

Repairs & Maintenance Action Plan

			drive.	
k) to establish whether demand exists for “out of office hours”	Evening/Saturday appointments offered if demand confirm need	March, 2013		
l) BMU to work with Tenant Liaison section	Joint working in place	December 2012	Completed, Joint working in place, BMU consultation team set up consisting of trades and management. First planned meeting with tenant’s group cancelled by request of tenants	100%
m) Customer care training is provided for all staff		December 2013	Customer Care training for all BMU employees has been completed	100%
n) the introduction of a dedicated landline number for repairs.		April 2013	Completed	100%
6. Diversity				
a) How does the organisation respond to the diversity of its community to ensure that all users, or potential users, have fair and equal access to stock investment and repairs/maintenance.		April 2013	All documentation produced by housing services is available in various formats such as braille and large print. Also documentations such as the Tenant Newsletter are looked at by a panel of tenants before	65%

Repairs & Maintenance Action Plan

			they are printed. Tenant profiling exercise underway.	
7. Capital improvement, planned and cyclical maintenance, major repair works				
a) Is the organisation carrying out the right maintenance and improvement work to the right homes at the right time.	WHQS compliance	Dec 2013	During December 2012 the Internal Investment programme procured In order to comply with the WHQS came to a successful completion. Subsequently, external advisers have provided independent verification that the standards have been met and that stock retention remains a viable option.	100%
8. Responsive repairs				
a) How effective and responsive is the organisation in keeping its homes and communal facilities in a good state of repair?		Dec 2013	Internal Communal Areas refurbishment coming to an end May 2014. New Security doors decoration, lighting and non-slip flooring works being carried out. Post WHQS responsive repairs inspected and completed within an average of 28 days.	70%

Repairs & Maintenance Action Plan

Emergency repairs- to establish what performance would be against a 4 hour target and introduce this as the new target.	Performance against 4 hour target known New target implemented.	November, 2012	Completed November 2012	100%
Routine repairs – stepped targets to take performance to upper quartile.	Stepped targets in place	November, 2013	New priorities implemented November 2012	100%
Target times – to investigate the discrepancy between service standards and BMU target times	Discrepancy investigated	September 2012	Completed September 2012	100%
Urgent repairs – to review existing urgent repairs timescales (possibly 5 day urgent)	Urgent repair timescales reviewed	September 2012	Reviewed - Urgent repairs now stand at 24 hour response as requested by SHO	100%
Routine repairs – the number of routine categories to be reduced	Number of categories reviewed	October 2012	Completed - Categories have been reduced	100%
9. Void repairs				
a) How quickly, to what standard, does the organisation complete repairs to empty properties.	Minimum lettable standard / WHQS		Completed November 2012	100%
b) allocations team to inform the BMU of the priority order in which they want voids returned to them.	Priority order put in place	Nov, 2012	Completed November 2012	100%

Repairs & Maintenance Action Plan

c) Void turnaround – Housing Service to introduce stepped targets to improve and possible lean review of end to end of service	Stepped targets Lean review considered	April 2013 April 2013	New Void process introduced September 2013	100%
d) Void Costs – to review current void cost to understand what key cost drivers are.	Void costs reviewed	End March, 2014	Void costs being monitored over the Financial year post WHQS	60%
e) Lettable standard – to develop an agreed lettable standard	Lettable standard in place	Dec, 2012	Completed January 2012	100%
f) Customer service – to revise the repair service standards, policy and customer literature to best practice levels	All literature will be best practice	End March, 2013	See 5c	
g) Low demand voids – to carry out options appraisal on low demand properties and develop plan as to whether to repair.	Options appraisal performed Voids plan in place	June 2013	Options Appraisal being carried out Completion By the 15 th December 2013	70%
l) Utilities during void period –to contribute to project to have utilities within void properties.	Utility supplier in place	March, 2013	Utilities company pulled out last minute. New utility company being sourced.	0%
10. Gas Servicing				
a) Does the organisation comply with gas safety regulations.		March 2013	Completed March 2012 – BMU does comply with gas safety	

Repairs & Maintenance Action Plan

			regulations	100%
b) To review all arrangement for annual programme	<p>CP 12 dates provided</p> <p>Annual programme passed to BMU</p> <p>Performance information shared</p> <p>No access procedures reviewed</p> <p>VFM demonstrated</p>	March, 2013	Completed March 2013 and ready for implementation April 2013	100%
11. To review the current Client/contractor split				
a) and evaluate various options in order to identify the “best fit” which will deliver the future strategic vision for the repairs function of Housing Services.	<p>Options being evaluated and recommendations made</p> <p>New client/contractor</p>	March, 2013	In progress	25%
12. Performance				
a) to routinely share performance, benchmarking, customer demand, complaints and satisfaction information with the BMU. Targets mutually agreed.	<p>Information routinely shared.</p> <p>Targets going forwards</p>	Immediate	<p>Implemented</p> <p>Nov 2012</p>	100%

Repairs & Maintenance Action Plan

	mutually agreed			
b) to design and introduce a comprehensive performance monitoring schedule to provide a balanced scorecard approach of cost, quality, productivity and customer satisfaction. Targets to be stretching and challenging.	Performance schedule designed Performance schedule introduced and managed	March, 2013 End October, 2012	Completed and implemented	100%
c) Pre and Post Inspections – to move to industry best practice levels	10% pre and post inspections achieved	End March, 2014	This is currently implemented by way of Orchard	100%
13. IT Systems				
a) to review the proposed phasing of the implementation and put contingency arrangements in place	Review proposed phasing Contingency plans in place	Nov, 2012 phase 1 June, 2013 phase2	Phase 1 complete. Implementation of phase 2 is behind schedule – please refer to highlight report submitted to Transformation Board.	60%
14. Contract Management / Housekeeping				
a) to implement a comprehensive schedule of housekeeping tasks to ensure that the systems of the BMU are always accurate and form a basis for	Housekeeping schedule introduced	In line with recs form Internal	Currently awaiting additional training for staff on Business Objects which will allow the	50%

Repairs & Maintenance Action Plan

informed decision making		Audit Report (Oct, 2012)	monitoring of costs and performance.	
15. Medium Term Business Plan –				
a) to develop a medium term BMU plan to deliver the Housing Strategic plan.	Medium Term plan in place	April, 2013	In progress	
16. BMU Management Teams				
a) monthly meetings established	Monthly meetings in place	September 2012	Completed November 2012	100%
17. Housing Service`s vision-				
a)to communicate the new vision to the BMU	Vision communicated	November, 2012	Completed November 2012	100%
18. Job volumes				
a) to understand the reasons for job volumes reducing.	Reasons for reducing job volumes know	March, 2013	5 year WHQS Investment programme completed.	
19. Operative rest breaks				
to review and formalise required rest breaks (out of hours working)	Defined rest breaks in place	February 2013	Completed Nov 2012	100%
20. Productivity targets				

Repairs & Maintenance Action Plan

a) to arrange a skills audit of the operatives to assess skills and inform future work planning	Productivity targets in place	March, 2013	In progress, with support from Chartered Institute of Housing Cymru – Learning Needs Analysis, October 2013	50%
21. Skills Audit				
a) to arrange a skills audit of the operatives to assess skills and inform future work-planning	Skills Audit completed	June / September, 2013	Job descriptions for all trades have been completed and passed to HR who are currently awaiting the outcome of tribunal on equal pay prior to proceeding.	85%
22. Procedure manuals				
a) to update all procedure manuals with the changes to operational arrangements introduced during 2012/13	Procedure manuals of up to date procedures in place.	To be completed by September 2013	New Tenants hand book to be introduced early 2014. Printing cost issue to be resolved. Progress made on reviewing policies and procedures for staff	50% 35%
23. Procurement consortia				
a) to be explored for material procurement	All procurement consortia evaluated	Link with findings of internal audit report	Discussions commenced with Procurement for Housing PfH. Report to be forwarded to the Head of Service for	75%

Repairs & Maintenance Action Plan

			consideration.	
24. Minimum van stores on vans				
a) to ascertain whether insurance on van stores can be obtained in order for higher stores levels to be retained on vans	Insurance arrangements reviewed Revised van store levels in place	April, 2013	Insurance arrangements reviewed, implemented on certain vans, will be fully implemented by April 2013	100%
25. Overheads				
a) to review the charges to the BMU to ensure reasonableness	Breakdown of costs provide Reasonableness established	September 2013	BMU currently a cost centre and all charges are at cost.	100%
26. Materials				
a) to review the specification of materials to establish whether savings can be made.	Joint working group in place Materials reviewed Recommendations made	To be confirmed	Joint working group in place, Materials Procurement now at a stage that when the meeting with Pfh has taken place a report can be prepared and forwarded to the Head of Housing for consideration	100%
27. Stores uplift				

Repairs & Maintenance Action Plan

a) to establish whether 20% uplift covers cost of stores	Calculation carried out	End March, 2013	Completed	100%
b) Stores option appraisal – to carry out an options appraisal on the future of the stores	Options appraisal completed	June 2013	Internally-led options appraisal of the stores completed. Report currently for consideration by Head of Service	50%
28. Staff appraisals				
a) to take account of new strategic direction for Housing and identify skills gap.	Appraisals completed	December, 2012	Completed December 2012	100%
29. Sickness				
a) establish the rates for the BMU and compare to industry averages	Rates calculated Benchmarking carried out	November 2012	Currently working with APSE. Awaiting information from APSE	50%
30. Variations				
a) to introduce formal procedures for operatives varying jobs	Variation procedure in place	September, 2013	Variation procedure in place to be reviewed when mobile working implemented	100%
31. Cost comparison with SOR				

Repairs & Maintenance Action Plan

a) to review BMU job costs to SOR rates once new schedule of rates introduced	Cost comparison to SOR undertaken	September, 2013	Cost Centre in Place since April 2013 giving a potential 20% saving on last year's budget. Work on going with SOR's	50%
32.Job cost benchmarking				
a) to share information with BMU once available	Information shared	November, 2013	Stats issued at monthly Managers meeting.	100%
33.Stock condition survey				
a) to share information with BMU once available	Information shared	March 14	Keystone being implemented as phase 2 of Orchard. 20% stock condition survey check has been carried out post WHQS.	60%
34.Aborted jobs				
a) the % of aborted jobs should be formally measured and corrective action in place.	% of jobs monitored Corrective action taken.	October 2012	Monthly % of void calls recorded and monitored since May 2012	100%

Repairs & Maintenance Action Plan

35.% Repairs completed at first visit				
a) to measure first time fix rates	First time fix rates known	September, 2013	Orchard system currently implemented will report on this	100%
36.Flexible working arrangements				
a) to consider flexible arrangements with operatives to provide a “wider service time coverage”	Alternate arrangements considered	March, 2013	In progress	25%
37.Out of Hours				
a) size of standby team to be reviewed after multi-skilling introduced.	Team size reviewed	To be looked at following Equal Pay Claims	Work on multi skilling still on going by HR	50%
38.Work tickets				
a) to contain vulnerability/disability information of tenants	Information provided on work tickets	December, 2013	To be implemented when mobile working solution goes live. No personnel data will be put on work tickets for security reasons	
39.Van fleet				

Repairs & Maintenance Action Plan

a) to review whether van safety checks can be reduced	Van safety check frequency reviewed	December, 2013	Completed Dec 2012	100%
40.Sub- contractors				
a) costs compared with SOR values	SOR comparison performed	September, 2013	Subcontractors will work to same SORs	100%
b) Work for sub-contractors – to review which work should be sub-contracted and which should be brought in	Review completed	September 2013	This will form part of the procurement for Subcontractors to start shortly following the completion of the material procurement	0%
41.Evaluation of major contracts				
a) tenants to review gas servicing contractors	Review completed	April 2013		
42. Staff Appraisals- to take account of new strategic direction for Housing and identify skills gap				
	Appraisals completed	Dec 2012	Appraisals completed by 21 Dec 2012	100%
43. Tool Box Talks – more effective talks with operatives to include performance information sharing and service improvement				
	New formal tool box talks introduced	September 2012	Regular tool box talks introduced since Sept 2012	100%

Repairs & Maintenance Action Plan

44. Value for money				
a) How well does the organisation maximise the impact from its resources on stock investment, repairs and asset management?				
b) How effectively has the organisation established partnerships geared to achieve value for money and improving its performance to service users?			Much work has been done to minimise Client/Contractor split, partnership working has been introduced and is working well throughout the maintenance team, cost centre implemented June 2013 which will further improve performance and provide value for money	85%
c) Has the organisation used procurement to achieve value for money in delivering services that benefits service users and others?			Revised procurement methods now introduced to achieve value for money	50%

Ref	Recommendation	Categorisation	Accepted (Y/N)	Implementation Date	
4.1	Where expenditure on goods and / or	High	Yes	30 April 2013	

Repairs & Maintenance Action Plan

	<p>services of a similar nature exceeds £30k a formal tendering process in compliance with Contract Procedure Rules should be undertaken.</p>			<p>Draft to be completed by end of June 2013</p> <p>100%</p>	
				<p>Working closely with Corporate Procurement team</p> <p>0%</p>	
				<p>Draft Procurement Strategy Completed and submitted Jan 2013</p> <p>100%</p>	
1.1	<p>A Procurement Strategy and Policy for the Building Maintenance Unit should be developed.</p> <p>The Strategy and policy should outline the commitment to obtaining value for money via procurement and how this is to be achieved.</p> <p>The development of a strategy should include a review of the procurement requirements of the</p>	High	Yes	<p>30 April 2013</p> <p>Draft Procurement Strategy completed Jan 2013</p> <p>100%</p>	
				<p>Current procurement methods reviewed</p> <p>100%</p>	

Repairs & Maintenance Action Plan

	<p>BMU to determine if there are exceptional circumstances whereby current CPRs and FPRs are inappropriate or impractical in providing procurement methods that provide value for money.</p> <p>If such exceptional circumstances exist then any corporately agreed exceptions should be included in revised CPRs.</p>			and new methods implemented to provide value for money	
1.2	<p>When the Contract Procedure Rules and Financial Procedures are added to 4Policy BMU staff should be asked to confirm that they have read, understood and agreed to abide by the procedures.</p>	Suggestion	Yes	At time of corporate implementation	Implemented on approval of Procurement Strategy
2.2	<p>When the Procurement Strategy for the BMU is produced training should be provided on its contents to all Authorised Signatories and those with procurement responsibilities.</p>	Suggestion	Yes	30 June 2013	Training to start on Approval of Procurement Strategy