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**Plus Dane Scrutiny Panel Review**

**The role of the Development Team**

**in the handover of new properties**

**December 2019**

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**1. Background**

This is the fourth review carried out by Plus Dane’s Scrutiny Panel (Panel).

Currently there are nine Panel members, who have contributed to the review by attending focus groups, conducting a desktop review, gathering service specific information, designing a survey and holding meetings with the Development Team.

The four month review began on the 8th of August and was completed in December 2019.

We have worked closely with the relevant staff teams at Plus Dane throughout the review. Staff from the Development Team briefed the Panel about the processes and service they currently provide to customers moving into their new homes. The Team also identified concerns and challenges and have suggested possible improvements and solutions to help produce recommendations for change.

**2. Introduction**

The Panel decided to review the handover of new properties following on from a Dragon’s Den event where Plus Dane Directors suggested areas for the Panel to consider. We selected this review because it is an area of the business that does not have a lot of customer involvement and it offered a good opportunity to investigate how the customer experience could be improved.

**The Scope**

The review considered the handover process from 28 Day Notice from the perspective of:

* What information is provided and when.
* Whether the information provided by the Development Team to new customers is relevant and/or accessible.
* Looking at the role of the Development Team and their potential touchpoints with customers from the 28 Day Notice through to the customer moving into their new home including managing the risk of changes to dates and the impact on customers.
* Post move in contact – whether there is a need for any follow up by the Development team following move in and whether the customer experience could be improved.

This was done by identifying:

* Opportunities for better communication between the Development Team and the customer during the 28 days prior to handover and up to 6 months after handover of their new home.
* Opportunities to improve the information provided to the customer.
* Improvement opportunities for the Development Team at any stage from the 28 Day Notice to handover.
* Improvements to the information passed to customers about their new home.
* Areas of good practice from other organisations.

**3. What we learnt**

Although the scope for the review focusses on the handover process from 28 Day Notice to 6 months after a customer moves into their new home we actually concentrated the review from the 14 Day Notice to 12 months after moving in. We did this because we found that contact with the customer nearly always takes place from 14 days before they move in and not before. We also thought that by carrying out the survey to more customers (12 months after moving in rather than 6 months) we would be able to capture more information to shape the review.

We learnt that the Development Team have very limited (if any at all) contact with customers. The Development Team oversee the construction of the property and the Lettings Team have the interaction with the customer.

The Development Team are responsible for producing a Homeowner manual which varies in content with each property.

Plus Dane built 150 properties during the year – a mixture of shared ownership, homes for rent and homes for sale. Some properties were built by Plus Dane while others were purchased directly from a developer (s106). Plus Dane have more control with own build properties as they see the build through from inception to completion.

There is currently no routine satisfaction collected from customers after they have moved into their new home, although it was noted that a recent Plus Dane Voices customer consultation had been carried out at the request of the Development Team.

It is often difficult for Plus Dane to get defects and snagging completed once handover has taken place. This is because developers have left the site and often use sub-contractors (who operate nationally) making it difficult and costly to get them to return to carry out single defects.

**4. What we did**

**Survey**

We invited 150 customers who had moved into their new home during the last 12 months from both Cheshire and Merseyside to complete a survey. This included those who had bought homes from Plus Dane, shared owners, rent to buy, and tenants including decants. Customers who had previously been contacted for the recent Plus Dane Voices survey were not contacted again. There were 41 completed telephone surveys all carried out by the Engagement Team over a week from 28 October to 4 November.

**Focus Group**

We held a Focus Group with three Project Managers and the Development Assistant, three Panel members and the Engagement Team. Discussions took place in confidence and staff were honest and open about concerns they had, things that worked well and suggestions for improvement.

**Desk Top Review**

We looked at relevant information including;

* New handover packs used internally from a variety of developers for a range of different homes
* New handover packs from external developers including those used by the private sector and other Housing Associations
* Internal documents used by staff including
* Relevant sections from the Development Procedures Manual and the Design and Technical Brief
* Internal memos, 28, 14 and 7 Day Notices, handover checklist, New Unit Registration Form
* Information about complaints
* Websites from other Developers

**5. What we found**

**1. Survey**

Some of the main findings from the 41 completed phone questionnaires showed that;

90% were satisfied with the process of moving into a new home

37% experienced delays with moving in

95% were happy with the handover pack - 73% have looked at it since moving in

57% would not find an electronic version better

34% looked at the Plus Dane website

80% were satisfied with support received after moving in

80% were kept informed about what was happening from the first point of contact

50% would like more contact with the Development Team

**What we found**

* Most customers (90%) are satisfied with the process and their experience of moving into their new homes. They found it smooth, quick, straightforward and that staff were helpful. Poor communication was the main issue for those who were not satisfied.
* Most customers are generally kept well informed from the first point of contact and throughout (although 20% were not).
* Some Customers (20%) had concerns once they moved into their new home based around poor communication, snagging and defects.
* Most customers are happy with the end product.
* Almost all customers found the handover pack relevant and useful.
* Preferred method of contact for satisfaction surveys is phone followed by email to be carried out within 3 months of moving in to their new home.

**What this tells us**

* It appears that no-one is taking over all responsibility for sorting out defects and snagging. There appears to be a dis-connect between Plus Dane and the developers throughout the process.
* Defects and snagging are not always being completed.
* Customers are contacting developers directly on site to get things done.
* Plus Dane do not always get back to customers when they say they will.
* Standard of cleanliness and finished product are not always as good as they could be.
* Customers would like access before moving in to measure up.
* Could be more flexible with viewing appointments.
* Possibly provide a welcome pack of household items similar to Riverside.
* Customers suggested showing how appliances work rather than just provide the information in the pack.
* Some gas/electric meters are not being registered to the correct property.
* The Plus Dane brand isn’t always promoted or known to home owners.

**2. Focus Group**

**What we found**

* The Development Team are proud of the end product and enjoy the experience of meeting the new tenant although this is not necessarily part of their job
* There is a good relationship between the Development Team and the Lettings Team.
* Staff are very passionate about what they do.
* The Development Team do not have any contact with the customer throughout the process and feel the one point of contact with the Lettings Team works well.
* Production of handover packs is not consistent.
* Branding is inconsistent including compliment slips, clothes, packs etc.
* Satisfaction surveys are not carried out.
* The Development Team have no presence on the Plus Dane website.
* Information is not given for care of turf.
* S106 handovers do not have time before handover to address issues around defects (own builds have 14 days).
* Internal forms used are not always accurate and up to date.
* The Development Team are not involved with new tenant visits - information from these is not fed back to them.

**What this tells us**

* If the Development Team do not carry out regular satisfaction surveys they do not know what customers think about the new homes and what could be done to improve them for future builds. Also they do not know how to improve the customer experience.
* The Development Team do not feel there would be any benefit from having more customer contact.
* Handover packs could be more consistent and branding improved.
* The Plus Dane brand is not consistent.
* Information including internal forms need to be reviewed updated and improved, including internal memos, 28, 14 and 7 Day Notices, handover checklist, New Unit Registration Form

**3. Desktop exercise - handover pack/branding**

**What we found**

* The layout and design is not consistent and could be improved.
* Some information is incorrect or inaccurate.
* Packs are only available in one format.
* Information is sometimes too technical and not reader friendly.
* Information does not promote wider services or information about the locality.
* Packs are not seen by the new customer until the day of handover.

**What this tells us**

**Layout/design**

* Plus Dane should develop a new home pack template (including manuals) to drop individual property information into to ensure all packs are consistent and have a Plus Dane brand. This should include a friendly introduction and use of non-stock photos. The pack cover should be used to promote the Plus Dane brand similar to Homes Hub.
* The pack could be split into sections – easy to reference what you need. Packs could include room by room sections.
* The pack could include bold text to emphasise points eg ’Do Not’ for addressing green issues such as do not replace grass with artificial grass/care for turf.

**Contents**

* Information including contact details should be accurate.
* Should be personalised to the property.
* As well as hard copies, packs could be made available electronically and include links to You Tube demonstrations. PD should explore the use of a ‘your new home video’. Look at the possibility of a portal with a unique login. The portal could have live updates for the customer and hold record of defects/snagging, room layouts etc
* The tone should be informal and welcoming – should utilise the Plus Dane Tone of Voice filter.
* More thought should be given to what the customer might find useful. There is a large amount of information contained in the packs. Information should be relevant and simple – some provided is too technical.
* Could include a section on who to talk to at Plus Dane once customers move in.
* Look at the possibility of sending the pack a few weeks before moving in so the information can be digested in a timely way.
* Should include tips for moving – mail redirection etc.
* Could include an aerial map with local amenities and information. Could also promote wider services including home insurance.

**6. Summary**

We would like to thank Plus Dane for working with us and supporting us in carrying out the review, and for providing us with information and access to staff and customers.

In summary – the top 5 Recommendations are focussed around;

1. The importance of carrying out customer satisfaction surveys to help with business improvement.
2. Branding – this has been an issue highlighted in each review we have carried out and it continues to be an issue again in this review.
3. The importance of Plus Dane being seen as one organisation whether it is Homes Hub, shared ownership or general needs housing.
4. The need for oversight of snagging and defects and ensuring things are followed up.
5. Improving communication throughout the process including reviewing the homeowners pack, internal forms, keeping customers informed, and getting back to customers when Plus Dane say they will.

**7. Recommendations**

**Before handover**

1 Develop a ‘Meet the Development Team’ on the website.

2 Ensure oversight and responsibility for the customer journey/experience.

3 Ensure a good level of cleanliness and a high standard for the finished product.

4 Investigate the possibility of allowing access to the property prior to moving in.

5 Ensure staff keep all customers informed throughout the process and get back to people who have contacted Plus Dane even if there is bad news to deliver.

**After handover**

1. Look to address the disconnect between Plus Dane (Customer Access Team, Lettings Team and Development) and the developer throughout the process to ensure a seamless and improved experience for the customer.
2. Review the process for dealing with snagging and defects to ensure they are completed.
3. Investigate the feasibility of an in house Clerk of Works to oversee snagging and defects and to have a greater understanding of the common issues to help inform future developments and improve the customer experience.
4. Consider ways to encourage new customers to go through the Contact Access Team to report repairs/defects and not just contact the builders on site.

**Information provided to the customer about their new home**

1. Plus Dane should develop a new home pack template (including manuals) to drop individual property information into to ensure all packs are consistent and have a Plus Dane brand throughout (like Homes Hub). This should include a friendly introduction and a pack cover to promote the Plus Dane brand.
2. Investigate inconsistencies with branding and remove outdated compliment slips, logos on clothing, and packs with NI brand.
3. Promote the Plus Dane brand through Homes Hub so all customers are aware that Homes Hub is a part of Plus Dane.
4. Ensure all information given to new tenants is up to date and accurate.
5. Consider different formats for the new home pack and investigate the possibility of a new customer portal or explore how the planned customer portal could allow access and provide information to new customers

**Opportunities for the Development Team**

1. Review and update internal forms and remove outdated branding.
2. Look at the handover period for s106 properties and consider providing more time for the Development Team to prepare the property for the new customer.
3. Consider how the Development Team could be present at sign up to introduce the property to the new customer. This could be a percentage of properties handed over.
4. Consider the possibility of involving the Development Team in the new tenant visits.
5. Look at the possibility of developing a new process to facilitate the feeding back of customer feedback from the lettings team to the development team.

**Customer Satisfaction**

1. Carry out regular satisfaction surveys to customers after they have lived in their new home for 3 months.
2. Ensure there are clear processes for lessons learnt.
3. Look at how to capture insight at every point of contact Plus Dane has with the customer and feed it into service improvement.