



Mears Scrutiny Board

Annual Report 2020-2021



Contents

1. Chair's Foreword
2. PLC Chair's Response
3. Centre for Governance and Scrutiny
4. Board Members' biographies
5. Your Voice approach
6. Impact summary
7. Board findings and recommendations
8. Priorities for 2021 – 2022



Chair's Foreword

In my role as Chair of the Mears Scrutiny Board, I am pleased to introduce our first annual report.

The Scrutiny Board was established in 2020 as one of three new customer engagement mechanisms, forming part of a new 'Your Voice' strategy, the others are a Customer Forum delivered in partnership with Tpas and an online network.

Its purpose is to scrutinise, support and hold Mears to account as they seek to raise service standards for all customers. For this first year, we took the decision to

focus on Mears' social housing services, provided directly as a landlord or via contracts with local authorities and housing associations. The Board agreed to focus on issues affecting a wide range of social housing customers, as a result, some specific Mears services were not in scope. We will review this decision regularly.

The Board is supported and its independence verified by the Centre for Governance and Scrutiny, a national charity specialist in all aspects of governance.

The Customer Board Members were independently recruited with a range of personal, professional and tenancy experience. Everyone recognises and values the opportunity to work closely with Mears to scrutinise and influence the experience of their customers.

The Board managed two 'in person' meetings before the lockdown in March 2020. Despite the restrictions, it has been successful in building positive relations with the Mears team and growing its knowledge and experience as an effective scrutiny team.

Our approach has been to add 'real time' value through our involvement in current development such as reviewing the content of their lockdown customer communications and testing a new customer appointment app.

We also carried out more in-depth investigations into issues which we saw as being fundamental to improving the Mears customer experience:

- ▶ Analysing customer communications across the range of platforms
- ▶ Identifying leading 'customer satisfaction' performance indicators
- ▶ Reviewing the customer journey map and supporting toolkit
- ▶ Evaluating the call centre experience

This report sets out the work of the Scrutiny Board, our analysis and recommendations and priorities for 2021/22. As part of Mears' commitment to transparency, this is publicly available and will be considered by the PLC Board and executive team.

I am satisfied that Mears will respond positively to the recommendations and we look forward to tracking progress and impact during 2021/22.

Terrie Alafat CBE *Chair, Mears Scrutiny Board*



PLC Chair response

Mears welcomes the insight, challenge and support from the Scrutiny Board and assurance provided by the Centre for Governance and Scrutiny.

This year has presented significant challenges to Mears as we have worked hard to keep our customers and employees safe, whilst protecting the most vulnerable and delivering vital services. Our commitment to being open to scrutiny during this time has not waived, in fact we were more committed than ever to operating in a way that was open, transparent and welcomed the challenge of our customer Scrutiny Board.

In its first year, the Scrutiny Board is already seen as a valuable asset to the business and we will actively adopt the recommendations contained in this report.

I am also looking forward to seeing the results of their work in the coming year as their experience of the Mears business grows. I am keen that they are seen by the business as the 'go to' place for challenge, advice and support, alongside our Customer Forum and Online Network.

We want to continue to lead the way in improving customer service and listening to customers and clients, and this Board is a vital part of how we will achieve this ambition.

Kieran Murphy *Independent Non-Executive Chairman of the Board*



Centre for Governance and Scrutiny

The Centre for Governance and Scrutiny has provided support to the Scrutiny Board ensuring its independence and effectiveness in providing insightful scrutiny to Mears.

During a challenging first year, Mears has welcomed scrutiny and co-operated with the Scrutiny Board providing information as requested, engaging fully at a senior executive level and being open and honest in their evidence giving.

I am confident that the Board has maintained its independence and the Board's advice and recommendations are acted upon.

Jacqui McKinlay, *Chief Executive, CfGS*

Scrutiny Board Members

Biographies



Terrie Alafat CBE – Independent Chair

Terrie retired from being Chief Executive of the Chartered Institute of Housing (CIH), the independent voice for housing and the home of professional standards in November 2020. Before joining CIH in 2015, Terrie was director of housing in the then Department for Communities and Local Government, with overall policy responsibility for the supply and management of housing across all tenures, housing growth, and homelessness prevention and support. She worked in the civil service covering various housing policies and programmes from 2003. Terrie was given a CBE in 2013 for services to homeless people. Terrie continues to be active in housing through non-executive roles in housing and homelessness.



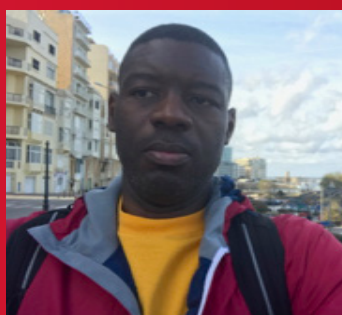
Roger Gisby



Susan Hodgson



Dr Samuel Komakech



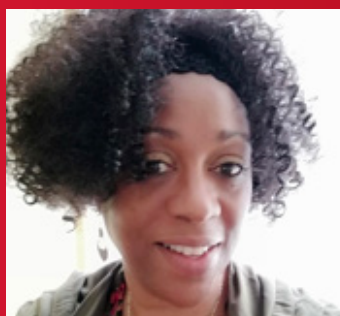
Kerith Melbrooke



Helen Smith



Sue Smith



Mavis King



Moosa Yousuf

Roger Gisby – Customer Board Member

Roger is an East Kent Housing Association tenant of thirty years and is an active tenant representative. He has also been involved with Mears on estate and void property inspections to maintain standards of excellence in property maintenance, and monitoring contact centre calls to ensure quality of service throughout the reporting process. He supported the development of a new tenant handbook with other districts working with Tpas. Roger takes a hands-on approach to representing his neighbours and community, taking time to find out their issues and working with the appropriate people to get them sorted. Roger has a building background and currently works as a security guard.

Susan Hodgson – Customer Board Member

Sue is a retired civil servant, she was employed for a number of years as a financial advisor, within the Department of Works and Pensions. She also previously worked for Tower Hamlets repairs services. On taking early retirement, to care for her husband; she found herself looking for a challenge, to stretch herself, Sue enrolled with her local unitary authority (Thurrock) on the Tenants Excellence Panel. She has been serving in the Panel for over nine years, four of which as Vice Chairman. Sue is also a member of Thurrock Sea Cadets Management team, a member of the King George Playing Field steering group and also an aid at the Tilbury Community Hub.

Dr Samuel Komakech – Customer Board Member

Dr Samuel Komakech is an academic with over 20 years of experience in the private and public sector and academia. Samuel brings deep corporate governance experience through work with corporate boards including audit and finance committees as a consultant.

Currently, he is an Associate Professor in Accounting and Finance at Leicester Castle Business School, De Montfort University. He was a Senior Manager at KPMG East Africa and started his career in public service at Uganda Revenue Authority. Samuel is a tenant of a Mears' property (Plexus) in Leicester.

Kerith Melbrooke – Customer Board Member

Kerith is a believer in better community through alliances in diversity, intellect and strong associations. He trained as an ACCA and AAT, he has lived and worked in 4 different countries, and has excelled in customer services, process management and analysis. He worked on HRA, Rent, Grants and Communications scrutiny teams with the North Lanarkshire Federation. He won Best Individual newcomer and also as best fundraiser with Amnesty International. He is currently serving as Treasurer for the North Lanarkshire Federation Executive Committee and Nights Manager for Hampton by Hilton Edinburgh Airport. He has a passion for travel, mind management and excellence in customer services.

Helen Smith – Customer Board Member

Helen helps to shape the NHS and give patients the best experience from her role as a nursing associate on a neonatal unit. A vital part of this role is knowing how well you can connect with people and communicate your understanding back to them. During her university years, in her role as student representative, Helen helped students have a voice by creating positive change, great experience and excitement. Helen holds two university degrees, both within healthcare subjects. In her spare time, she enjoys going to the gym, sketching and booking her next adventure. Helen lives in the North West.

Sue Smith – Customer Board Member

Sue Smith has been a parish Councillor since 2006 and a member of the resident association since 2004. She is passionate about helping Council tenants with their housing issues. She is Chair of Woughton Community Council and MKALC (Milton Keynes Association of Local Councils) and on the executive board of BMKALC (Buckinghamshire and Milton Keynes Association of Local Councils), and lastly Vice Chair of Parish Forum (for Milton Keynes Council). Sue is a dog lover and owns two German Shepherds and a Chihuahua.

Mavis King – Customer Board Member

Mavis is a librarian by profession and has completed studies at graduate level. She is currently employed within the HE sector as an Assistant Learning Resources Manager. She has previously worked in in several management positions within the private and public sectors. Her passion is customer services and enabling greater ease of access to a diverse range of users to services and resources. Mavis is a single parent and has lots of experience of living in different types of housing including temporary accommodation. Mavis lives in London.

Moosa Yousuf – Customer Board Member

Moosa is a PhD student at the University of Salford, who has previously studied at four universities leading to two undergraduate degrees, a Masters and a Postgraduate Diploma in fields related to economics and finance. He has gained memberships of two academic honours societies (BGS and ODE) and attained a chartered accountancy qualification (ACCA). Moosa is a student resident in Manchester and the student representative for the accommodation under a peer support program provided by the Students' Union.



Mears - Your Voice Programme

Mears Customer Scrutiny Board

An independently chaired panel of customer representatives working alongside the PLC Board and providing oversight, challenge and support to Mears. It will be supported and its independence assured by the Centre for Governance and Scrutiny.

Mears Customer Forums

Thought leader and tactical based virtual forums that challenge and shape current and future thinking, bringing together influencers, clients, customer professionals, key stakeholders, residents and community activists. This forum will create a link between the Scrutiny Board, our online network and scrutiny structures and will be supported by Tpas.

Mears Online Customer Network

A virtual online network of residents from around the country, who opt into providing feedback on our services - provide insight into what's important and what's not - offer opinion and suggestions - validate and endorse our thinking/new initiatives.



Summary of Scrutiny Board Recommendations

Customer Communication

The group provided immediate feedback which has been incorporated into updated customer communication materials including:

- ▶ Updating the resident handbook to make it as personal as possible by including information such as Emergency/ Out of Hours contacts, local office details and who is responsible for providing what maintenance service.
- ▶ Ensuring that the purpose of the handbook is made clear and customer focussed, most customers will be looking for 'how to' advice or information. Also changing the language used so it's relevant, straightforward and easy to understand.
- ▶ Checking operatives are clear on how to fill in the missed appointment cards and they are always used.
- ▶ Providing the facility to track progress on repairs, other work, complaints etc on the website.
- ▶ Reviewing the 'contact us' page on the website making it easier for customers to use through more user friendly language and avoiding specialist terms such as housing maintenance, facilities management, etc.

Alongside a strategic recommendation:

- ▶ For Mears to consider introducing a co-production approach to customer communications involving customers in the development, testing and sign-off of new materials and reviewing existing communications.

Customer Experience Performance Indicators

- ▶ For Mears to implement the new customer experience data analysis strategy and approach, including the new performance indicators dashboard, for use at PLC, executive and branch level.
- ▶ For the Scrutiny Board to ensure the insight gathered from the performance dashboard drives improvements in customer service and identifies best practice for the Group. The Scrutiny Board will review the effectiveness of the new approach after a year.
- ▶ To benchmark performance internally and externally with best practice standards from a range of sectors and professional bodies
- ▶ To ensure the Mears' approach is responsive and meets future changes to social housing consumer regulation and Mears remains a service leader in sector.

Customer Journey Map and Supporting Toolkit

The group provided immediate feedback which was incorporated into the customer journey map project and approach, this included:

- ▶ Changing the design and layout to make it easier to use including using images to support journey descriptions.
- ▶ Developing a one minute video presentation to sum up each stage of the journey visual to bring the content to life, the task group would be involved in signing off the content.
- ▶ Ensuring the training clearly explains how Mears expects colleagues to deliver each stage of the journey, what good looks like and how it will be measured.
- ▶ Providing feedback on the communication materials which will be used with Mears' customers at each stage of the journey.

In addition, the Scrutiny Board is recommending:

- ▶ For the task group to be involved in an online journey mapping session to pilot the workshop approach and provide feedback.
 - ▶ For Mears to provide feedback to the Scrutiny Board on the implementation of the Customer Journey tool with contract teams and stakeholders including customers, assessing its impact on performance and any best practice identified.
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Call Centre Experience

- ▶ Reviewing the steps being taken to promote and support diversity and inclusion through their contact centre practice e.g. using the correct pronouns, etc.
 - ▶ Considering what additional steps can be taken to provide appropriate, empathetic support to customers dealing with sensitive issues such as anti-social behaviour, domestic violence, mental health issues, etc.
 - ▶ Providing feedback to the Scrutiny Board on the progress being made to provide a consistent customer contact experience across a range of channels.
 - ▶ Devising new processes which ensure direct customer engagement in the design and review of contact centre processes and materials.
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Board Findings and Recommendations

The Scrutiny Board focused on making an impact in two ways:

- a. By providing 'real time' scrutiny and feedback which enabled them to have an immediate impact.
- b. By undertaking a deep dive investigation into specific areas which the Board identified as fundamental to improving customer service.

Methodology

To achieve these objectives, the Board initially focused on gaining an understanding of the business and identifying the core issues impacting on customer experience. They did this through:

- ▶ Induction briefings from senior operational leads, customer service and contact centre managers and the customer insight team.
- ▶ Analysis of the customer complaints process and data, communication and satisfaction data, contract and performance data.
- ▶ A review of communication channels and materials, including the materials used for COVID related communications.

Meetings were held virtually from March 2020 and additional task group sessions were set up. The Board also connected with the Customer Forum when it started later in 2020. Board representatives attended Forum sessions and considered future topics. It is intended that there will be closer working between the Board, Forum and Network during 2021.

Analysis

From this work, the Board reached some initial assessments on Mears' performance:

- ▶ There is an obvious desire and commitment at the most senior levels and throughout the organisation to listen, understand and improve the customer experience.
- ▶ There are a wealth of positive examples and stories of Mears staff building excellent relationships with tenants and tenant groups, providing information and responding to issues as they arise, sometimes above and beyond what is expected.
- ▶ Mears' response to COVID reflected the organisation's flexibility and commitment to protecting vital services and maintaining customer service standards.
- ▶ There is a clear strategy for customer service improvement which should have a positive impact e.g. a new appointments app, changes to how the contact centre is organised and new ways to gather and report customer feedback.

There were also areas that the Scrutiny Board identified as needing further investigation:

- ▶ Unsatisfactory customer communication was a consistent theme behind complaints and some poor performance.
- ▶ Confusion over who was responsible for what (the client, Mears, sub-contractors) and how this impacted on customer interactions and their perception of Mears.
- ▶ Inconsistent performance across the Mears Group and queries over how these were monitored, reported and escalated.
- ▶ Some examples of poor customer experience resulting from a lack of understanding and empathy for individual circumstances.
- ▶ Inadequate understanding of the key customer service performance indicators which would give insight into good practice or problems with a local area or contract.
- ▶ Inconsistency in customer communication across different channels (website, handbook, etc) and queries about accessibility.

‘Real time’ feedback

During the year, the Scrutiny Board sought to challenge, inform and advise on current developments, including:

- ▶ Reviewing the existing complaints process and materials, and providing suggestions which were incorporated into the updated process.
- ▶ Testing and reviewing a new customer appointment app, providing feedback on the features, language used, support materials and rollout.
- ▶ Providing feedback on COVID communications including an animation aimed at customers and advising on customers’ appetite for increased maintenance visits.
- ▶ Providing challenge on the potential risks of furloughing local customer service staff.

Deep-dive investigations and recommendations

Task groups were set-up to look at the four areas requiring further investigation. Working with a Mears' lead, the Board members undertook additional analysis and made recommendations as reported below.

1. Customer communications

Task

To review the content of Mears' customer communications material to assess its accessibility and content, and whether it was user-friendly.

Approach

The task group reviewed the resident handbook/ customer information pack, missed appointment/ no access cards and website content and asked the following questions:

- ▶ Does it give customers all the information they need?
- ▶ Is there anything missing?
- ▶ Is there too much information?
- ▶ How helpful would this be in an emergency?

Recommendations

The group provided immediate feedback which has been incorporated into updated customer communication materials including:

- ▶ The resident handbook including 'Handy Contacts' - Telephone Numbers – Emergency/ Out of Hours and providing space for details of the local office, scaling back and consolidating the information and making it as bespoke as possible to the individual's tenancy agreement.
- ▶ Ensuring that the purpose of the handbook is made clear and customer focussed, most customers will be looking for 'how to' advice or information. Also changing the language used so its relevant, straightforward and easy to understand.
- ▶ Checking operatives are clear on how to fill in the missed appointment cards and they are always used.
- ▶ Providing the facility to track progress on repairs, other work, complaints etc on the website.
- ▶ Reviewing the 'contact us' page on the website making it easier for customers to use through more user friendly language and avoiding specialist terms such as housing maintenance, facilities management, etc.

Alongside a strategic recommendation:

- ▶ For Mears to consider introducing a co-production approach to customer communications involving customers in the development, testing and sign-off of new materials and reviewing existing communications.

2. Customer experience - Performance Indicators

Task

To review the current performance data to assess how effective the measures are in helping Mears' improve customer service, contract performance and business development.

Approach

The Board worked closely with the Mears insight team throughout the year to:

- ▶ Review the existing data gathered on complaints and contract performance.
- ▶ Undertake further analysis of high performing areas and those requiring improvement support to establish if there are leading indicators.
- ▶ Review the performance reports produced for contracts and up to the PLC Board.
- ▶ Establish what performance measures have the most impact on the customer experience.
- ▶ Consider how this work helps to prepare Mears, and the wider sector, to respond to the Social Housing White Paper requirement for new consumer standard measures.

The Board identified that there were a number of leading performance indicators including:

- ▶ Response and resolution times for repairs
- ▶ How customers rate communications and how this compares across different types of contracts ranging from where Mears is the landlord to a repairs provider
- ▶ Measures of employee engagement
- ▶ Increased customer complaints particularly related to staff attitude and behaviour and poor communication
- ▶ Client feedback
- ▶ Internal engagement and insight gathered by the Mears customer success team

It was recognised that the context created by different contract and client requirements and local demographics has an impact when it comes to creating a consistent customer experience.

However, the Board also felt that Mears should strive to provide the best possible customer experience whatever the circumstance. Indicators are a way to achieve this by:

- ▶ Identifying and sharing best practice within the business
- ▶ Supporting areas or teams that require improvement
- ▶ Incorporating measures within existing contracts and when bidding for work that improve the customer experience
- ▶ Helping to extend understanding at PLC level and make decisions that support enhanced customer service standards across the whole group.

Working with the Mears Insight and IT teams, the Board has been able to support Mears in the development of a new performance management framework, bringing together a whole range of

data and measures that will allow Mears to quickly and meaningfully spot trends, make positive interventions and reward good performance.

The Board also supported how Mears tells the performance story, creating a clear line of sight from PLC Board to each contract and recommending what should be reported to each.

Recommendation

- ▶ For Mears to implement the new customer experience data analysis strategy and approach, including the new performance indicators dashboard, for use at PLC, executive and branch level.
- ▶ For the Scrutiny Board to ensure the insight gathered from the performance dashboard drives improvements in customer service and identifies best practice for the Group. The Scrutiny Board will review the effectiveness of the new approach after a year.
- ▶ To benchmark performance internally and externally with best practice standards from a range of sectors and professional bodies
- ▶ To ensure the Mears' approach is responsive and meets future changes to social housing consumer regulation and Mears remains a service leader in sector.

3. Customer Journey Map and supporting toolkit

Task

To review the different stages of a new Mears' Customer Journey Map and assess its accuracy and effectiveness in improving customer service.

Approach

The task group reviewed the internal customer journey map documentation, including training resources, to assess:

- ▶ If the descriptions for each stage of the journey were clear and summarised what a customer needs at each interaction with Mears Group.
- ▶ How the tool could be used with specific teams and parts of the business to identify areas for improvement.
- ▶ If it worked well in terms of layout, language, imagery etc. and accessible to all.

Recommendation

The group provided immediate feedback which was incorporated into the customer journey map project and approach, this included:

- ▶ Changing the design and layout to make it easier to use including using images to support journey descriptions.
- ▶ Developing a one minute video presentation to sum up each stage of the journey visual to bring the content to life, the task group would be involved in signing off the content.
- ▶ Ensuring the training clearly explains how Mears expects colleagues to deliver each stage of the journey, what good looks like and how it will be measured.

- ▶ Providing feedback on the communication materials which will be used with Mears' customers at each stage of the journey.

In addition, the Scrutiny Board is recommending:

- ▶ For the task group to be involved in an on-line journey mapping session to pilot the workshop approach and provide feedback.
- ▶ For Mears to provide feedback to the Scrutiny Board on the implementation of the Customer Journey tool with contract teams and stakeholders including customers, assessing its impact on performance and any best practice identified.

4. Call centre experience

Task

To review the call centres processes and identify areas for improvement.

Approach

The task group were due to visit the call centres but due to the COVID restrictions this was replaced with a desktop exercise which involved:

- ▶ Getting a shared view of what is a good call centre experience and how Mears compares to others
- ▶ A review of key documents from the Manchester Customer Service Centre and the Milton Keynes Support Hub, these included:
 - ▶ process maps of customer contacts
 - ▶ agent scripts and other key documents
 - ▶ training documents

The Mears team worked with the task group to identify areas for improvement.

Recommendations

The group provided immediate feedback which was incorporated into the customer journey map project and approach, this included:

- ▶ Reviewing the steps being taken to promote and support diversity and inclusion through their contact centre practice e.g. using the correct pronouns, etc.
- ▶ Considering what additional steps can be taken to provide appropriate, empathetic support to customers dealing with sensitive issues such as anti-social behaviour, domestic violence, mental health issues, etc.
- ▶ Providing feedback to the Scrutiny Board on the progress being made to provide a consistent customer contact experience across a range of channels.
- ▶ Devising new processes which ensure direct customer engagement in the design and review of contact centre processes and materials.

Priorities for 2021 – 2022

Building on the progress made in the first year, the Scrutiny Board will continue with its twin-track approach of providing 'real time' scrutiny and deeper dives into specific issues. The Board will specifically focus on:

- ▶ Customer communication
- ▶ Homelessness
- ▶ Key focus areas from the Social Housing White Paper

A measure of success is to be able to illustrate how the Board's recommendations have directly impacted on the Mears' customer experience. This will be partly achieved by the Board being seen by the business as a forum that senior managers are keen to engage with for feedback, challenge and endorsement.





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