

Tree Strategy – Phase 1 Current Process Review

Customer Involvement Report

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Report Purpose

Southern Housing Group are reviewing the maintenance of trees on communal land.

The Project Team is being led by James Mark, Head of Property and Estate Management South. Ian Scott, Director of Estate Services, is the projects' sponsor.

Daniel Gibson from Procurement for Homes (PFH) was recruited by SHG as the consultant for the tender process.

The answers residents provide will assist the Tree Strategy Project Team in asking contractors key questions as part of the tender (bid) process in addition to helping the Project Team review the current process of raising a query or a concern about a tree.

The Project Team wanted to provide a proactive and reactive maintenance programme for trees on communal land

Once the tender, scoring and interview process has been completed to find the right contractor, the aim will be for the contract to start in time for the next financial year, April 2021. Two trained residents in Procurement and Contract Reviews will be appointed to assist the Project Team with set questions during the scoring and interview process.

The final phase will enable involved residents becoming trained Estate Inspectors to help SHG monitor the standards based on the Service Level Agreements.

Consultation Themes

The themes were to explore problems residents encountered when reporting their concerns with trees to SHG, to understand the current method of reporting and appraise residents' expectations of a tree maintenance contract and contractor.

Customer Involvement worked with Daniel Gibson to construct a set of questions for residents.

Consultation Methodology.

Residents' with a key interest in Estate Inspections were invited to take part in the review of the current process, including residents keen to become Estate Inspectors and monitor standards of SHG communal areas.

This report sets out the findings of the surveyed residents. Residents were involved by completing an online survey, word document survey, email feedback, a one to one telephone call with Customer Involvement and by taking part in an evening Zoom focus group. Telephone calls were made to currently known non-digital residents with a contact number.

In line with standard research practice, and due to the numbers of residents involved, the findings of this review group cannot be viewed as providing representative feedback on the views of all the Group's residents. These results do provide an insight into the views and opinions of residents.

Respondent profile

38* residents took part. Below we have outlined their tenure, region and method of involvement:

Region	Focus Group	Telephone	Word document/Email	Online survey	Total
London	2	0	1	5	8
Essex	0	0	0	1	1
Berkshire	0	0	1	2	3
Kent	0	0	0	3	3
Sussex	0	4	0	4	8
Surrey	0	0	0	1	1
Hampshire	0	2	0	2	4
Isle of Wight	3	0	0	5*	8
Not given	0	0	0	2	2
	5	6	2	22	38*

*35 residents took part overall. 3 residents took part in the online survey and focus group

Male:	12
Female:	10
Couple:	1
No details available:	12

Average duration of consultation:

Focus Group: 2 hours total

Telephone calls: 37.5 minutes

Online Survey: 10 minutes

Consultation findings

Q1) Can you tell us about your experience contacting Southern Housing Group regarding a problem with a tree on our land?

Residents told us:

- No further contact after making a report
- Need to chase response
- No safety equipment used with chainsaw
- Not sure who to report to – passed through different departments
- No work undertaken
- Contractor does not clear up mess
- Trim branches themselves or pay for own contractor
- Too many changes of staff on a patch – knowledge not passed on to next HSM

Q2) How did the experience make you feel?

Residents told us:

- Not knowing if tree is safe or not
- Angry, wasting their time
- Contractor unprofessional – resident was ready to call 999.
- Unsure who report has been passed onto or who is responsible
- Residents trim branches themselves, worry about safety of trees
- Contractor leaves the area untidy and is unprofessional
- Need to re-tell background to tree issues to new staff members recruited to patch

Q3) What are the essential features of a service you would expect from a contractor delivering a tree maintenance contract for residents and Southern Housing Group?

Residents told us:

- Professional – knowledge and correct equipment, look the part, polite
- Liability insurance
- Communication – feedback to residents
- Carry through work promised
- Value for money – prepared to pay slightly more if all aspects of a tree maintenance service are carried out
- Devise a plan for each area

- Inter-partnership working – solving problems together, such as roots cracking pavements, seeds being cleared
- Manage residents expectations – light and views, bird season – share knowledge. Consult with residents before chopping
- Be visual and contactable
- Be respectful of residents' plants and borders where permission has been given to improve communal land
- Regular surveys of trees undertaken

Q4) What information would you like the appointed contractor to provide to update residents on tree health and condition?

Residents told us:

- Risk assessments
- Plan for maintaining trees in each area - share the rationale behind decisions
- Timescales for carrying out the work
- Provide a flyer or letter to residents
- Arrange meetings between residents and contractors – consult
- An on-line link with data
- Share information on TRA's and Action Groups' Facebook pages

Q5) When reporting a concern, what would help your experience?

	A) An understanding of what the process is	B) Knowledge of the area where tree is located	C) The timescale for attending to the problem	D) Gaining a reply with a timescale for the problem	E) Understanding who owns the land that the tree stands on	F) Understanding limitations to works under (TPO's) and the processes SHG follow
Online	46%	42%	83%	71%	38%	58%
Focus Group	83%	67%	83%	83%	83%	83%
Telephone	100%	100%	100%	100%	67%	50%

Residents told us:

- Keep to the Service Level Agreement.

- Come and see the problem in bad weather – it may not be able to be attended to for health and safety, but residents feel without seeing the problem at its worst, how can the issue be evaluated?

Q6) What concerns have you noticed with trees in your area?

	A) Small branches breaking	B) Health and Safety of tree	C) Overgrown trees blocking or reducing light
Online	53%	63%	47%
Focus Group	Agreed	Agreed	Agreed
Telephone	67%	50%	50%

Residents told us:

- Residents ask for light problems or views to be considered as trees grow. Expectations of what can be done need to be managed.
- Trees dying - not being maintained
- Many years of no attention to trees despite reports made
- Sap and leaves making paths slippery or cars dirty

Q7) Who do you usually report concerns about trees to?

	A) HSM (Home Service Manager)	B) Surveyor	C) Estate Care	D) Service Centre	E) Online repairs report form
Online	32%	0%	26%	74%	5%
Focus Group	50%	0%	0%	67%	50%
Telephone	50%	17%	17%	67%	0%

Residents told us:

- I report to as many people as possible to try and get the job done
- Report to the contractor (Isle of Wight)

Q8) When the contractor is in place, who would you expect to report a concern to about a tree?

Residents told us:

- If the contractor is large enough – direct to the contractor
- Need to ensure the person we are speaking to knows the location
- The person needs to come and see the location where the report is from
- Whoever is going to listen to our concerns and act upon them

Q9) When contacting SHG to report a concern with a tree on our land, which of the following methods do you use?

	A) Email	B) Telephone	C) Online repairs report	D) Report in person during estate inspection	E) Report in person to Home Service Manager	F) Report in person to surveyor
Online	50%	68%	5%	23%	23%	0%
Focus Group	67%	50%	50%	0%	50%	0%
Telephone	33%	50%	0%	0%	33%	0%

Residents told us:

- No longer given notifications for Estate Inspections. I would like to attend. The HSM inspects on their own
- I have lived on the estate for 20 years and never seen an inspection or feedback following an inspection
- I report to Estate Care
- I report to the contractor (Isle of Wight)
- I write a letter
- I reported directly to the maintenance team 4 years ago. They visited me but I never heard back.

Q10 When reporting a concern with trees, what information are you able to provide?

	A) Location	B) Description of problem	C) Photo of tree/location
Online	96%	75%	54%
Focus Group	Agreed	Agreed	Agreed
Telephone	83%	83%	50%

Residents told us:

- In person - if an estate inspection was carried out

Q11) What information would be helpful to residents once a contract has been awarded?

	A) The service level agreement	B) How to report concerns with trees to SHG	C) What information is required when reporting a tree?
Online	67%	79%	58%
Focus Group	Agreed	Agreed	Agreed
Telephone	66%	83%	66%

Residents told us:

- If a local contractor is required on the Isle of Wight due to weather restrictions of travel, the tree contractors are likely to be local small organisations without the capacity to take volumes of residents' calls.
- Managing agents are told about problems on their land that affect SHG properties. We need to know who to report, what to and how to progress issues.

Q12) Any other feedback?

Residents told us:

- Shared ownership properties communal land is the responsibility of managing agents. Discontent with managing agents. Inter-partnership working required to help customers.
- Trees on land adjacent to SHG communal areas – who is responsible within SHG when adjacent land owner not attending to a tree problem?
- Value for money contract is important. Small increase in service charge better than cheapest contract and poor service/communication.
- I used to attend estate inspections and then they just stopped with no communication.

Report summary

The key outcomes have been summarised and reflect majority opinion from the qualitative and quantitative data:

Residents told us they want to see a value for money contract with the service level agreement adhered to. Residents care about where they live and do not feel that based on the current level of service that the contractors feel the same way.

They want to know what the recommendations are for the trees where they live due to safety concerns for their homes. When contractors appear to not be wearing the right equipment or are seen sitting in their vehicles for longer than they undertake work, residents believe the cheapest contractor has been employed by Southern Housing Group. Residents want to see contractors cleaning up and taking away what they have cropped.

Residents told us they want to know what the outcome of their report was – if no work is required or is to be planned, they would like this fed back to them and understand why. Residents feel neighbours are starting to lose interest in reporting problems due to a lack of action or a lack of communication as to why actions have not been carried out.

They would like to see a planned approach to maintain trees in their area. Residents like their green areas and are unhappy if trees are cut down or cropped heavily after the contractor is seen talking to just one or two residents. They would like greater consultation prior to long term impacts on the trees where they live

Residents would like to have a clear idea as to who to contact and how. They want the person speaking to them to have a knowledge of where they live. If tree problems are based on neighbouring land or managed by an agent, they would like SHG to take responsibility for the discussions to resolve ongoing issues.

The Isle of Wight encounters problems with high winds. Residents on the island find themselves attending to pruning branches themselves and when they raise safety concerns, problems caused by high winds do not appear to be noted thoroughly as the area is not visited when the weather is bad.

Residents would like teams to work together where a problem that is the responsibility of one team, affects another. Due to their experiences, they do not feel this happens.

Recommendations

These recommendations have been summarised and reflect majority opinion from the qualitative and quantitative data:

Recommendation 1:

- Share information with residents - the contractor must have the right level of experience and professionalism

Gain testimonies from organisations of similar sizes that the contractor has been working with.

Feedback from the project team:

Agreed. Experience and professionalism will be key element for the tender (bid) evaluation, and external references will be obtained prior to the contract being awarded.

Recommendation 2:

- Communication – advise all tenure customers who to contact and when and what the Service Level Agreement is.

Feedback from the project team:

Agreed. In advance of commencement of the contract communication will go to all customers where we have trees in communal areas. Communication will include reference to the service offer

- Feedback to residents to let them know the outcome to their safety reports. If a tree does not need work at that time, let the resident know why.

Feedback from the project team:

Agreed. Appropriate local communication with customers will be mainstreamed within the contract management framework

Support residents with communal tree problems on adjacent private/local authority/housing association land causing concern to them.

Agree in principle however each instance will need be assessed on its own merits/circumstances

Recommendation 3:

- Inform residents – Service Level of Agreement, Risk Assessments for trees in their area and the plans to maintain trees in their area.

Feedback from the project team:

Agreed – please see the feedback above.

Recommendation 4:

- Be visible to residents. Examples: Arrange to meet with residents following a H and S concern raised. Attend Estate Inspection for ongoing problems.

Feedback from the project team:

Agreed. A key aspect of Estate Care teams is already to be an on-site presence and the attendance of tree maintenance contractor will enhance this

All contract operatives will have logos on their vehicles and uniforms of the contractors they are representing.

Recommendation 5:

- Value for money – all round service would be worth an increase within reason, so long as the other recommendations are carried out

Feedback from the project team:

Agreed. Improving value for money, efficiency, and accountability will be built into both the tender evaluation and contract management framework

Recommendation 6:

- Estate Inspectors monitoring Service Level Agreement as part of overriding Standard Monitoring of Estates in conjunction with SHG teams and agreed guidance.

The Customer Involvement team can assist the Project Team at the post tender stage by asking Resident Reviewers to 'sense check' information letters/posters to/for residents about the new contractor.

Feedback from the project team:

To be reviewed once the contract has been awarded and the Quality Assurance (QA) process has been developed within the contract management framework.

Feedback from the Customer Involvement Team:

The Customer Involvement Team are developing the role Estate Inspectors and how they will work with services.

In the Tree Strategy report for the Evaluation of tenders (bids) process, recommendations have been shared and agreed with the Project Lead to enable residents to get involved in reviewing communications to be shared with residents about the new contractors and the service level agreements.

The next step

- Two trained residents in Procurement and Contract Reviewing to take part in aspects of the scoring and interview stages. The training will be taking place over four 3-hour sessions at the end of September/Early October 2020.

Feedback from the Customer Involvement Team

Two residents have now taken part on the evaluation of the tenders (bids). The recommendations from the report for the evaluation process have now been agreed by the Project Lead.

What happens next?

Thank you for reading this report. This report is a summary of the feedback received from residents regarding the project and at this time has not been shared with them.

The Customer Involvement Team are committed to giving feedback directly to the residents who took part in this consultation and to enable us to do this could you please ensure, as the project lead, the feedback covers the following:

- How you have addressed each recommendation and if not supported why this is the case.

Feedback from the Project Team:

I have considered all the recommendations based on the terms of reference of the project and the improvements we are committing to within the internal Group Portfolio Management Office (GPMO) project plan.

Information from the Customer Involvement Team:

The GPMO work with Project Teams at the beginning of a project to look at and agree what the aims of the project team are and help form a plan to support the work and agreed outcomes.

- What changes have you made due to resident's feedback?

Feedback from the Project Team:

No significant changes were made, however the tender (bid) and contract documents will be fully aligned to the recommendations submitted

- What will you be doing differently following this consultation?

As above

- What is the timeline for the changes to be implemented?

Feedback from the Project Team:

Tender (bid) documents will be aligned October 2020. Contract management will be developed as part of mobilisation Feb-Mar 21, and customer communication to go on launch of the contract

- If it is a policy, procedure, strategy review please include the timeline for approval process.

Feedback from the Project Team:

A tree strategy will be developed in 2021 by the Estate Care team (timetable to be confirmed) and further customer consultation to be undertaken at that stage

Your feedback will be shared directly with the residents who were involved in the project. The final project report will include this feedback and will be posted onto our webpage for residents and staff to access.

Each project will be reviewed, one year on, to see what impact this project has had following on from the outcomes.