Confidential

Barbican Estate Office Review

Summary of Stage 1 and Stage 2 Report

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Introduction and objectives of the review

Introduction

The **purpose** of this project is to undertake an independent and detailed review of the current services provided by the Barbican Estate Office (BEO) and identify ways to improve the cost efficiency, overall effectiveness and value for money of the services provided to Barbican residents. In addition, the landlord (City of London), is seeking to deliver required efficiency savings against the Landlord's Account.

There are a number of **specific areas** that the review needed to address. These included:

- increasing service charge costs and ability to demonstrate value for money,
- overall supervision and management costs of the BEO
- required efficiency savings on both the Landlord's Account and Service Charge Account
- effectiveness of current policies and processes
- approaches to performance management

The first stage of the project was to undertake a detailed, critical appraisal of current services. Following this an interim report was produced. A summary of which was shared with BEO staff and resident committee chairs and members.

The findings set out in that report also provided **external validation** of the key issues that should be addressed. Many of the areas cited in this report were already known to the BEO staff and residents, but there is value in having those areas externally validated and set-out in preparation of prioritisation in Stage 2.

All findings referenced in this and other reports is based on evidence collated through the activities carried out as part of this review. This detailed on the next page.

Activity undertaken

It was clear from the outset that engagement with residents and staff was a critical part of this review. Below provides a snapshot of how both residents and staff have been engaged with the review, which ensured that their views were then used in shaping the options and recommendations set out later in this report.

As well as engagement with residents and staff, key stakeholders including the Chair and Deputy Chair of the Barbican Residents Committee were also spoken to.

A significant number of documents were also reviewed, as detailed below.

Activity	Purpose	Additional information
Discussions with staff	To provide insight and specificity into the functions and ways of working at the BEO.	**Discussions with 35 staff members** covering all functions and roles within the BEO (including car park attendants, concierges and cleaners) and those delivering services to the BEO (including property services and asset management). Discussions with staff took place without leaders or supervisors present. In addition we spent time observing the work of the car park attendants and concierges.
Discussions with residents and BRC members	To gain the view of residents on the services provided by the BEO.	**121 discussions with more than 45 residents** including House Chairs, Residents Consultation Committee (RCC) members and the Chair and Deputy Chair of BRC. **Reviewed more than 30 written correspondence from residents**.
Survey	To gather views from as many staff and residents as possible.	Staff Survey issued to 80 staff with 8 responses Resident Survey issued c1400 residents with 175 responses.
Documents reviewed	To provide insight and specificity into the functions and ways of working at the BEO.	**Over 100 documents were submitted and reviewed** and included financial data and reporting, outputs from resident surveys and resident feedback and complaints, service charge information and residents communications relating to these and wider resident communications, job descriptions, salary and terms and conditions information, outputs from staff surveys, policies, processes and operating procedures and performance data where available,

Key themes identified from review of current services

General observations

During the review we had 121 discussions with 35 members of staff and 45 residents. We would thank to both staff and residents for their time and input into this review. During our discussions we observed the following;

- Both staff and residents were keen to engage with and input into the review.

- Staff and residents were very open and honest during discussions and very happy to answer questions and provide examples and additional information where requested.

- In particular, staff were very helpful and responsive to our requests for data and information.

- Both staff and residents put forward positive and constructive suggestions for areas they felt could be improved.

Whilst the nature of the report necessarily focuses on those areas that were identified as being areas for improvement, it is important to acknowledge the positive aspects that were found during the review.

- Staff and residents have a real sense of pride in the Barbican.

- There is a desire by both staff and residents to work more collaboratively together.

- Residents recognised and acknowledged the value they place on staff within the Barbican Estate Office, in particular the sense of safety and security they get from having familiar staff on site, naming car park attendants and lobby porters particularly.

- Staff are committed to improving services and put forward constructive suggestions for doing this

- Resident engineers are very knowledgeable about the estate infrastructure, which is complex in nature.

- There was evidence of regular communication between staff and residents.

- The interim Head of BEO had already identified some of the areas highlighted in this review and work has commenced on improving these including use of agency workers and overtime, improving resource planning, ensuring all leaders receive the appropriate training including managing performance and ensuring all staff receive regular performance reviews and regular team meetings take place.

Identified areas for improvement

The summary interim report detailed the areas where improvement is required. As a reminder and in summary key areas identified that required focus were

- **Roles and staffing structure**. It was clear from the evidence gathered that the existing structure within the BEO is a barrier to the Head of BEO having the ability to have oversight of day to day services being delivered to residents and the control in being able to improve, change and develop services in a timely way to ensure those services continue to meet the demands of the residents.

- **Service delivery is reactive in nature and viewed over the short-term.** There is a lack of clarity and duplication across roles. Roles have been developed to resolve short term issues, whilst trying to maintain levels of service delivery. This has resulted in a lack of clarity in some roles, duplications across some roles and has also resulted in layers of leadership to support the maintenance of services that are essentially at a point of trying to meet the growing demands of residents in a reactive way because there has not been the capacity (and to some extent the capability) to look beyond the short-term.

- **Lack of detailed activity analysis of roles**. Detailed Linking to the point above, there has been little detailed activity analysis undertaken on roles to see where time is being spent, whether this is value add activity and whether there is too little or too much resource to meet the service demands. However, it should be noted the interim Head of BEO has done more work on this since arriving and detailed activity analysis on areas such as cleaning has been done as part of this review.

- **Performance Management**. There has been a lack of consistent and robust performance management. This is an area that is now being addressed and leaders within BEO are currently going through training in this area and all staff now have regular 121's and team meetings.

- **Absence Management**. There are high levels of staff sickness which is requiring significant amounts of resource to deal with, further compounded by the lack of training given to Supervisors to support them in this.

- **Too many channels to reporting issues.** Informal ways of working and communicating have developed that result in it being difficult for staff to oversee and track all issues raised and whether they have been effectively resolved. It also means staff spend lots of time passing on and chasing issues.

- **Poorly documented processes.** Policies and processes have been implemented without understanding whether they are fit for purpose for the Barbican Residential Estate and during the review it was difficult to locate formal process documents that help and guide staff. However this is an area that is now being addressed.

- **Lack of trust and confidence.** Residents have lost trust and confidence in their landlord. Staff of both the BEO and City of London feel they have to justify everything they do, which is pulling on capacity of BEO staff. It was clear from the discussions we had with both staff and residents that there is a desire to work more effectively and in partnership with each other.

- **Technology**. There needs to improved use of technology to update ways of working across the BEO. There was evidence through the review that BEO is behind the curve in relation to the use of technology to drive improvement and efficiency

Identified areas for improvement cont…

- **Value for money**. There was little evidence of how costs are controlled or targets set for budgets holders to drive improved value for residents.
- **Service Charging**. Service charges are based on estimates from the previous year as opposed to budget setting or even previous years actual costs. This means service charges will fluctuate each year and residents will continue to have significant surcharges that have not been planned for.
- **Performance reporting**. There is a lack of robust performance reporting and benchmarking, which means residents are unable to gain the required assurance that services being delivered are effective and deliver value for money. Additionally, there is no robust contractor performance framework (or KPIs) to hold contractors to account.
- **Communications.** Information is supplied to residents when requested but is complex to understand and often fails to give the required answers, assurance or inform the resident of the potential impact on them. Reporting to leaseholders assumes knowledge of complex terms, which may not be the case.

In summary, the current structure and ways of working are not sustainable. Change is required to enable the service to move from being reactive to proactive and support a customer first culture where there is the capacity and capability to continually improve and develop services and meet the demands of residents. Ways of working need to be changed and modernised, making better use of technology to improve efficiency and effectiveness. There needs to be improved data and reporting that is more easily accessible so staff and residents can have the oversight and confidence in robust and transparent reporting.

Recommendations

Organisational structure, culture and roles

Organisational structure, culture and roles

In the **following pages**, we set out a number of **specific recommendations** that are aimed at resolving some of the issues identified in the earlier section of this report:

All of these recommendations can be implemented with manageable levels of impact on residents, staff and future costs and therefore we advise these are implemented as soon as possible.

However, as well as recommendations, we were also tasked with identifying options where further improvements and cost savings can be made. We address these later in the report, acknowledging that these are more transformative in nature and therefore are options to be explored further but they are not recommendations.

It is also important to acknowledge that the recommendations will deliver benefits. Many organisations seek to implement too many changes at once. As well as being disruptive to service delivery it also means that organisations are often unable to deliver changes within the necessary timescales due to the pull on capacity and it also makes the measurement of benefits arising from the changes more challenging. Therefore we recommend a phased approach to the implementation of any changes, particularly where this change is more transformative.

Organisational structure, culture and roles – Summary of recommendations

During the initial review of services, we identified a number of areas that require **focus and a change in approach**. These are:

- Performance Management.

- Resource Planning, specifically where there is no additional capacity built into resource levels to cover holidays, etc.

Below are our **specific recommendations** in relation to these areas.

Recommendation	What issue/s does this resolve/benefits delivered	Ease of implementation
Implement the use of the City of London's established performance management framework, values and behaviours. This should include: - Setting of objectives and targets linked to KPI's and service delivery to residents. - Regular 121 meetings to provide support and discuss performance against targets, objectives and behaviours. - 121 appraisals for each member of staff in line with the City of London's requirements. - Regular team meetings to discuss performance, improve team communication and identify areas of focus/continuous improvement.	- Greater emphasis on seeing things from a customer perspective and improved accountability for the customer experience. - Performance management needs to be robust and consistent across all roles and linked to key performance indicators of services delivered across the Barbican as well as upholding the values and behaviours expected. - Improved focus on staff support and wellbeing, including regular 121's and team meetings being held. - Improved training for staff, particularly around people issues and performance management. - Managing and improving sickness absence levels. - Improving motivation levels amongst staff.	Already in progress
Create a pool of CPA/LP roles who can support with covering holidays, sickness, etc.	- Roles need to be based on the demands of the service and value to residents. - Resource planning requires improvement to reduce the spend on overtime and agency staff. - Increased focus on improving staff morale, including ensuring regular 121's and team meetings are carried out.	Already in progress

Organisational structure, culture and roles – Summary of recommendations

Below is a **summary** of the **specific recommendations** made in this section of the report.

Recommendation	What issue/s does this resolve/benefits delivered	Ease of implementation
Bring Property Services (e.g. Resident Engineers) and Service Charge & Revenues into the Barbican Estate Team, reporting directly to Head of Barbican Estate Office	• Improved oversight and control of these functions for the Head of BEO role to give a single line of accountability.. • Gives the Head of BEO role the accountability to enable the role to discharge its responsibilities to residents. • Improved service to residents	
Bring all commercial and revenue activity under the remit of the Service Charge and Revenues Manager	• Makes use of existing skills sets within the team. • Gives additional focus and capacity to maximise income from car park areas and storage. • Frees up capacity from the Estate Services team.	
Recruit a Surveyor/Contract Manager that reports into the Property Services Manager, (defined above).	• Brings additional technical expertise and experience into the BEO team. • Provides additional capacity to oversee the quality and effectiveness of costs of contractors work. • Able to provide technical input to more complex repairs issues. • Can act as a conduit between repairs, contractors and the Barbican residents. • Frees up capacity of house officers and other roles in chasing repairs. • Will give greater capacity for cyclical maintenance programmes, currently sitting under major repairs to move back to Property Services.	
Create a Property Co-ordinator role within the Barbican Property team	• Can provide insight and reporting to assist with the monitoring of repairs delivery including work in progress, outstanding jobs. • Can act as a conduit between the Property Services desk and Barbican team. • Frees up capacity of house officers and other roles in chasing repairs.	

Organisational structure, culture and roles – Summary of recommendations

Recommendation	What issue/s does this resolve/benefits delivered	Ease of implementation
Review the cleaning service, using the detailed analysis carried out as part of this review.	• Matches the resources to the cleaning service specification and identifies ways of streamlining tasks. • Builds in capacity for holidays, sickness, training and 121's. However holidays and time off need to also be better managed. • Therefore reduces the spend on overtime and agency staff. • Provides an opportunity to review the leadership structure needed to manage cleaning team.	
Review the role of supervisors and managers to ensure there is clarity on the purpose of the role, their key responsibilities, expected leadership behaviours and their role in driving the right culture across the team. This needs to be supported by improved training for leaders within BEO, particularly in terms of people practices and performance management (as identified earlier)	• Improved clarity of key responsibilities • Remove duplication • Improved performance • Improved staff morale and wellbeing	

Additional options to consider

Organisational structure, culture and roles

Organisational structure, culture and roles – Additional options to consider

In the previous section, we identified a set of recommendations across organisational structure, process redesign, budgeting and cost control and performance reporting, that can be implemented with manageable levels of impact on residents, staff and future costs. We advise these are implemented as soon as possible.

In this next section, we identify some further options, which have been considered and impact assessed as part of this review. However they will require further discussion and consideration by residents, the BEO staff and City of London before decisions are made.

These are not specific recommendations, but give further insight into the options available to remodel roles and services to be more efficient and effective in a more transformative way.

Below is a **summary** of the **additional options that have been explored as part of this review** and which residents, BEO staff and City of London may wish to explore further following the implementation of the recommendations outlined in this report, if approved. to be considered. It is important to note **these are not recommendations.**

Alternative option for consideration	Key Features	What issue/s does this resolve
Service Delivery		
Single accountability structure	• This model consolidates and brings together the Estate Services team and Estate Management teams. • There are various options of how the structure can be developed below the Resident Services Manager and these are detailed in the next box below.	• Will bring services under one single point of accountability and improved visibility and oversight of issues. • Will remove duplication from roles. • Will provide roles with the necessary oversight and control to discharge their duties effectively.
Resident Services team – House Officer model	• This is designed to support the House Officer role in being a resident champion and looks to explore ways to consolidate the services for a specific tower/block within the remit of House Officer role.	• Will bring services under one single point of accountability and improved visibility and oversight of issues at the lowest level possible. • Will remove duplication from roles • Will provide roles with the necessary oversight and control to discharge their duties effectively.
Alternative approach to delivering concierge services and management of car parks.	• This option takes a fundamentally different approach to delivering security and concierge services across the estate that will reduce the link between concierge services and management of the car parks, thereby basing roles on delivery of services residents value rather than the number of car parks.	• Roles need to be based on the demands of the service and value to residents.

Summary of additional options

Alternative option for consideration	Key Features	What issue/s does this resolve
Role of the Resident Engineer/Duty Manager		
Review the Resident Engineer role to ensure their technical expertise is being used to it's maximum potential and identify areas where there capacity is being taken on non-technical repairs. Explore areas where they can develop in-house technical support, to reduce the reliance on contractors.	• This is likely to give additional value for money with no change in service and better use of the Resident Engineers skill-set. • During the review 25% of the resident engineers time was not formally recorded and more work needs to be done to record and categorise this work..	• Roles need to be based on the demands of the service and value to residents.
Review the Duty Manager role.	• Analysis carried out during this review shows that 15% of what the Duty Manager responds to is considered an actual emergency. In most property organisations, these types of emergency repairs/call-outs are triaged through an out of hours number and an emergency engineer sent where required, within a specified service level agreement timescale. We understand this is how emergency call-outs operate across the rest of City of London estates.	• Roles need to be based on the demands of the service and value to residents.

Redesign of key processes

Overview and principles adopted

As part of the review, we were tasked with reviewing ways of working within the Barbican Estate office, policies and procedures and use of technology. We concentrated on those processes that were most commonly used by residents and had the highest impact on resident's service experience, this includes reporting repairs and property issues and raising general issues and queries e.g., service charges, formal complaints, etc.

We have produced detailed process maps based on a new "to be" state, the detail of which have been shared and agreed by Project Board. However, we wanted to share with BRC and RRC members the best practice principles, we have worked to which includes;

- Customers will have a **primary** clear, and **sufficiently skilled point of contact**, supported **by clear transfer of responsibilities between teams**.

- Interaction with residents should be **focused on providing excellent customer service**.

- Clarity on roles with clear split of responsibilities, **duplication will be minimised**, with activities consolidated where possible.

- Interactions between teams is seamless with **reduced silo working and improved communication.**

- Where possible, **steps in the process should be automated** or form part of a workflow in order to maximise efficiency and reduce human error.

- Processes are supported by **clear guidance for both BEO staff and residents** and **standardised approach in place for quality control** work sign off.

- Ensuring there is **access to the right technology infrastructure** to operate effectively and efficiently.

- Data should be utilised to **inform future service delivery** improvement and **demonstrate value for money** key stakeholders.

The process maps are extremely detailed, so we have not included in this report. However, the principles from these can then be used to undertake detailed process mapping for the other processes within Barbican Estate Office. This will need the Implementation/Transformation Team to see implement and see this through to its conclusion.

Budgeting, cost control and service charges

Budgeting, Cost control and Service charges

In the **following slides**, we set out a number of recommendations in relation to budgeting, cost control and communication with leaseholders. We have worked within **best practice principles**, which include:

- Budgeting timetable
- Accountability and ownership of costs
- Demonstrating value for money
- Leaseholder input
- External validation of accounts
- Clear, accessible and timely communication with leaseholders

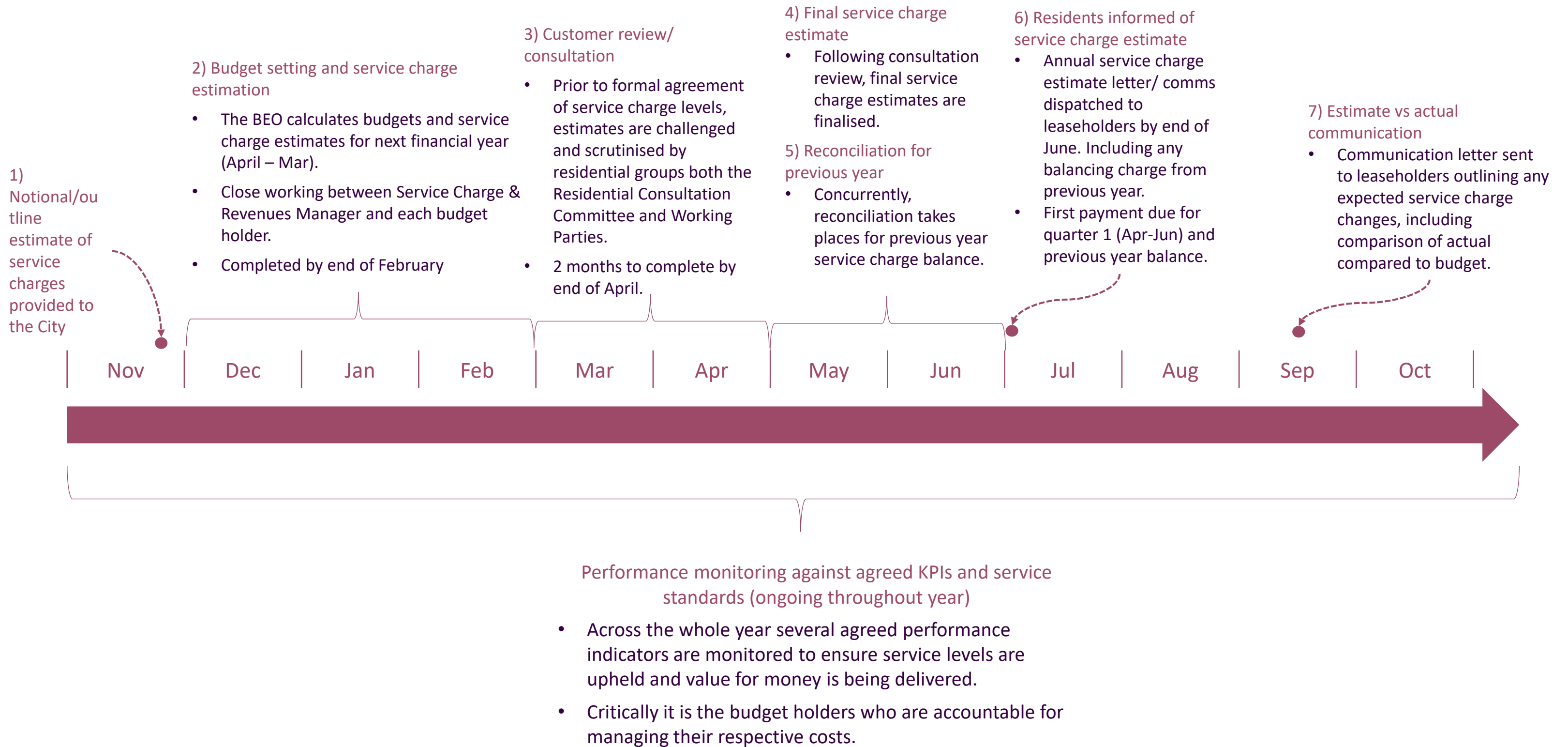# Budgeting, cost control and service charges – summary of recommendations

Below is a summary of the recommendation made in this section of the report.

Recommendation	What issue/s does this resolve	Ease of implementation
Carry out an independent, external validation of the service charges	• Greater accountability needed by budget holders to leaseholders to demonstrate the efficiency and value for money of the services they provide on an ongoing basis.	
Start the budgeting process earlier to ensure all costs provided by other teams can be sufficiently reviewed by the finance team, this includes a review of the approach taken to apportioning overhead costs e.g. HR and other support services.	• Improvement in the budgeting process. • Allow time to review service contracts to ensure they are still appropriate and provide good value. • Ensure costs are being correctly apportioned to the different accounts. • Include budget formulas for transparency	
Embed a culture change where costs are being reviewed on a regular basis and measures taken to control them by the budget holder (the person who authorises and approves spend) e.g. the monthly review meetings should be used to explore the variances in costs in more detail	• Ensure there is ownership of the costs in the budget by the budget holder, alongside a demonstrable responsibility for taking measures to control costs and reduce significant variances and be accountable to residents for any variances.	
Review the communication letters sent to leaseholders to address some of the concerns raised in as part of the initial review of services and provide training to staff where necessary.	• The contents of the letters includes what we would expect to be included. • However, communication needs to be clear, written in plain English with less jargon and offer detailed explanations for any variances. • Communication should be written from the readers' perspective, with the residents in mind. • Any data included in the documents should be presented in such a way that it allows easy comparison between different years.	
Carry out the reconciliation of the previous year service charges by June	• The budget figures for the upcoming year can be compared against actual costs incurred in the previous year. • Improved communication with leaseholders.	
Communicate with leaseholders on a quarterly basis	• This will allow BEO to keep leaseholders updated on expected changes to future costs (such as increases to energy costs or more information on the major works programme)	

On this slide we have summarised the recommended service charge and performance monitoring annual cycle timetable.

1) Notional/outline estimate of service charges provided to the City

2) Budget setting and service charge estimation
- The BEO calculates budgets and service charge estimates for next financial year (April – Mar).
- Close working between Service Charge & Revenues Manager and each budget holder.
- Completed by end of February

3) Customer review/consultation
- Prior to formal agreement of service charge levels, estimates are challenged and scrutinised by residential groups both the Residential Consultation Committee and Working Parties.
- 2 months to complete by end of April.

4) Final service charge estimate
- Following consultation review, final service charge estimates are finalised.

5) Reconciliation for previous year
- Concurrently, reconciliation takes places for previous year service charge balance.

6) Residents informed of service charge estimate
- Annual service charge estimate letter/ comms dispatched to leaseholders by end of June. Including any balancing charge from previous year.
- First payment due for quarter 1 (Apr-Jun) and previous year balance.

7) Estimate vs actual communication
- Communication letter sent to leaseholders outlining any expected service charge changes, including comparison of actual compared to budget.

| Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct |

Performance monitoring against agreed KPIs and service standards (ongoing throughout year)
- Across the whole year several agreed performance indicators are monitored to ensure service levels are upheld and value for money is being delivered.
- Critically it is the budget holders who are accountable for managing their respective costs.

Financial & Performance Reporting

In the **following slides**, we set out a number of **recommendations** in relation to future performance framework and monitoring redesign. In designing the future framework, we have worked with **best practice principles,** which include

- Golden thread throughout performance framework, from objectives through to performance indicators and aligned targets.

- Clear lines of reporting and timings to appropriate governance groups.

- Appropriate data assurance and governance procedures to uphold robustness and accurate of data and information

- Agreed set of performance indicators and success measures (targets) to monitor and inform service improvement

- Clear roles and responsibilities to manage and coordinate performance framework

In appendix 1 we have **set out** a **high level performance framework**, which identifies the key residential governance groups engaged in performance reporting including their respective roles and responsibilities and outlined **typical performance measures**.

This will need to be approved by the resident committees.

On the following slides we have provided an overview of the recommended performance framework including KPIs and example targets, tolerances levels to inform RAG ratings and reporting groups. Please note targets and tolerance levels are just examples and typically what we would expect however final levels will need to be agreed with relevant governance groups.

KPI No.	Key Performance Indicator (KPI)	BEO Lead (for reporting)	Annual Target (examples)	Annul tolerances (examples)			Reporting Group			
				Green	Amber	Red	Barbican Estate Office	Barbican Residential Committee	Residential Customer Committee	House Groups*
Property Management - These performance measures are in relation to the property management of the Barbican Estate including day to day repairs, cyclical maintenance works and major works.										
PM1	**Total number of repairs** – Total repairs completed by the BEO (to be monitored and compared year on year).	Property Services Manager	TBC	TBC	TBC	TBC	✓	✓	✓	✓
PM2	**% Emergency repairs within target** - Number of emergency repairs completed within 4hours/24 hours including making good	Property Services Manager	100%	100%	100% - 90%	<90%	✓	✓	✓	✓
PM3	**% Appointed repairs exceeding target working days for completion** - Number of repairs completed in more than 20 working days compared to total number of repairs ordered excluding emergencies	Property Services Manager	<5%	<5%	5% - 10%	<10%	✓	✓	✓	✓
PM4	**% Split of repairs carried out by Resident Engineers and external contractors**	Property Services Manager	TBC	TBC	TBC	TBC	✓	✓	✓	✓
PM5	**% of repairs requiring a recall / repeat** - % of repairs that cannot be completed first time and require a follow up appointment.	Property Services Manager	TBC	TBC	TBC	TBC	✓	✓	✓	✓
PM6	**Average time to complete Appointed Repairs** - Number of days (average) to complete a repair (ex emergencies)	Property Services Manager	<10 working days	<10 working days	10 -20 working days	<20 working days	✓	✓	✓	✓
PM7	**% Appointed Repairs completed on first visit -** Number of repairs completed on first visit compared to total number of repairs ordered excluding emergencies	Property Services Manager	85%	85%	85% - 75%	< 75%	✓	✓	✓	✓
PM8	**% of planned testing activities completed within planned timescales** – Planned tests include emergency lighting, lifts	Property Services Manager	100%	100%	100% - 90%	<90%	✓	✓	✓	✓
PM9	**% of inspections completed** – Total repair inspections completed within time (total inspections equal 15% of all repairs).	Property Services Manager	100%	100%	100% - 95%	<95%	✓	✓	✓	✓

* House Groups provided with the same KPIs as other governance groups but on each specific building (patch based) giving a more detailed breakdown.

On the following slides we have provided an overview of the recommended performance framework including KPIs and example targets, tolerances levels to inform RAG ratings and reporting groups. Please note targets and tolerance levels are just examples and typically what we would expect however final levels will need to be agreed with relevant governance groups.

KPI No.	Key Performance Indicator (KPI)	BEO Lead (for reporting)	Annual Target (examples)	Annul tolerances (examples)			Reporting Group			
				Green	Amber	Red	Barbican Estate Office	Barbican Residential Committee	Residential Consultation Committee	House Groups
Property Management - These performance measures are in relation to the property management of the Barbican Estate including day to day repairs, cyclical maintenance works and major works.										
PM10	**Average cost per repair**	Property Services Manager	TBC	TBC	TBC	TBC	✓	✓	✓	✓
PM11	**% of failed inspections** – Percentage of repair inspections that do not pass the quality assessment threshold.	Property Services Manager	<5%	<5%	5-10%	>10%	✓	✓	✓	✓
PM12	**Major Works KPIs** – For all major works/ capital programmes a set of KPIs should be measured, examples: • Time taken to complete works (standards agreed based on work type) • Cost KPIs - estimate vs actual • Quality - any/number of defects. • Resident satisfaction (measured by client-not contractor) • Wider contract KPIs - social value, shared savings etc.	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC
Resident Services - These performance measures are in relation to the resident services across the Barbican Estate and any non-repair areas.										
RS1	**Number of Issues** – Total number of issues and repeat issues before they go into formal complaint.	Resident Services Manager	TBC	TBC	TBC	TBC	✓	✓	✓	✓
RS2	**Number of stage 1 complaints** – Number of current complaints at the stage 1 level.	Resident Services Manager	TBC	TBC	TBC	TBC	✓	✓	✓	✓
RS3	**Number of stage 2 complaints** - Number of current complaints escalated to stage 2 level.	Resident Services Manager	TBC	TBC	TBC	TBC	✓	✓	✓	✓
RS4	**% of total complaints that are unresolved cases**	Resident Services Manager	0%	0%	0% – 5%	>5%	✓	✓	✓	✓
RS5	**% calls answered within service level** – Year to date calls answer within target time. Monitoring also splits out between Property Service Desk and Resident Services.	Resident Services Manager	90%	90%	90% - 85%	<85%	✓	✓	✓	✓

Recommended BEO Performance Framework

KPI No.	Key Performance Indicator (KPI)	BEO Lead (for reporting)	Annual Target (examples)	Annul tolerances (examples)			Reporting Group			
				Green	Amber	Red	Barbican Estate Office	Barbican Residential Committee	Residential Consultation Committee	House Groups
Resident Services - These performance measures are in relation to the resident services across the Barbican Estate and any non-repair areas.										
RS6	**% of tenants transacting online/ portal** – long term metric for how many tenants using online portal	Resident Services Manager	TBC	TBC	TBC	TBC	✔	✔	✔	✔
RS7	**Tenant satisfaction %** – Overall level and then split between repairs, cleaning, security, car pars, delivery of the capital programme (based on customer feedback at point of service rather than annual survey).	Resident Services Manager	85%	85%	85% -75%	<75%	✔	✔	✔	✔
Finance – These performance measures relate to the financial viability and budgeting across the Barbican Estate Office.										
F3	**% of service contracts checked** to ensure they are still appropriate and provide good value	Service Charge & Revenues Manager	100%	100%	100% - 95%	<95%	✔			
F5	**% of service charge queries responded and resolved within target time**	Service Charge & Revenues Manager	Targe time to be agreed	Targe time to be agreed	Targe time to be agreed	Targe time to be agreed	✔	✔	✔	✔
F6	**% annual change in service charge levels**	Service Charge & Revenues Manager	TBC	TBC	TBC	TBC	✔	✔	✔	✔
F7	**% difference of actual variable (e.g. repairs) service charge cost against budget –** This metric will be split across the five service charge areas, Major works, Open spaces, Property management, Estate management, Customer care.	Service Charge & Revenues Manager	0%	0%	0% - 5%	>5%	✔	✔	✔	✔