

You are requested to attend a meeting of the Tenant Services Management Board to be held in The John Meikle Room, The Deane House, Belvedere Road, Taunton on 20 February 2012 at 18:00.

Agenda

- 1 Apologies.
- 2 Minutes of the meeting of the Tenant Services Management Board held on 23 January 2012 (attached).
- 3 Public Question Time.
- 4 Declaration of Interests
To receive declarations of personal or prejudicial interests, in accordance with the Code of Conduct.
- 5 Housing Revenue Account Business Plan 2012 – 2042 - Verbal Update from the Community Services Manager
Reporting Officer: James Barrah
- 6 Housing Revenue Account Reform Project Dashboard - report of the Community Services Manager (attached)
Reporting Officer: James Barrah
- 7 Housing and Community Development Structural Change Proposals - Verbal Update from the Community Services Manager
Reporting Officer: James Barrah
- 8 Repairs and Maintenance Contract Procurement - Verbal Update from the Temporary Project Manager (Clive Chamberlain)
- 9 Somerset Strategic Housing Programme Interim Tenancy Strategy - report of the Housing Services Lead (attached)
Reporting Officer: Stephen Boland
- 10 Annual Report to Tenants Feedback - report of the Tenant Services Development Officer (attached)
Reporting Officer: Rosie Reed

- 11 Tenant Services Management Board Elections - report of the Tenant Empowerment Manager (attached)
Reporting Officer: Martin Price
- 12 Tenants' Open Day - report of the Tenant Empowerment Manager (attached)
Reporting Officer: Martin Price
- 13 Tenant Services Management Board Annual General Meeting - report of the Tenant Empowerment Manager (attached)
Reporting Officer: Martin Price

Tonya Meers
Legal and Democratic Services Manager

08 May 2012

Members of the public are welcome to attend the meeting and listen to the discussions.

There is time set aside at the beginning of most meetings to allow the public to ask questions.

Speaking under “Public Question Time” is limited to 4 minutes per person in an overall period of 15 minutes. The Committee Administrator will keep a close watch on the time and the Chairman will be responsible for ensuring the time permitted does not overrun. The speaker will be allowed to address the Committee once only and will not be allowed to participate further in any debate.

If a member of the public wishes to address the Committee on any matter appearing on the agenda, the Chairman will normally permit this to occur when that item is reached and before the Councillors or Tenant Services Management Board Members begin to debate the item.

This is more usual at meetings of the Council’s Planning Committee and details of the “rules” which apply at these meetings can be found in the leaflet “Having Your Say on Planning Applications”. A copy can be obtained free of charge from the Planning Reception Desk at The Deane House or by contacting the telephone number or e-mail address below.

If an item on the agenda is contentious, with a large number of people attending the meeting, a representative should be nominated to present the views of a group.

These arrangements do not apply to exempt (confidential) items on the agenda where any members of the press or public present will be asked to leave the Committee Room.

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An induction loop operates to enhance sound for anyone wearing a hearing aid or using a transmitter.

For further information about the meeting, please contact Democratic Services on 01823 356382 or email d.durham@tauntondeane.gov.uk

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Tenant Services Management Board Members:-

Mr D Etherington	(Chairman)
Mr M Edwards	(Vice-Chairman)
Councillor R Bowrah, BEM	
Councillor S Brooks	
Mrs J Bunn	
Mrs E Drage	
Mr D Galpin	
Mrs J Hegarty	
Mr K Hellier	
Mrs P Marshall	
Mrs T Urquhart	

Minutes of the meeting of the Tenant Services Management Board held on Monday 23 January 2012 at 6pm in the John Meikle Room, The Deane House, Belvedere Road, Taunton.

Present: Mr Etherington (Chairman)
Mr Edwards (Vice- Chairman)
Councillor Bowrah, Councillor Brooks, Mrs Bunn, Mrs Drage, Mr Galpin, Mrs Hegarty, Mr Hellier and Mrs Marshall.

Officers: James Barraah (Community Services Manager), Stephen Boland (Housing Services Lead), Martin Price (Tenant Empowerment Manager), Rosie Reed (Tenant Services Development Officer), Phil Webb (Housing Property Services Manager) and Keith Wiggins (Democratic Services Officer).

Others: Mrs Beryl Edwards and Nigel Stuart-Thorn

(The meeting commenced at 6.05pm)

1. Apologies

Apologies: Mrs Urquhart

2. Minutes

The minutes of the meeting of the Tenant Services Management Board held on 19 December 2011 were taken as read and signed.

3. Public Question Time

Questions and a statement were received in writing from Mr Martin Aldred, as Chairman of the Halcon North Tenants and Residents Association.

Mr Aldred requested advice on who to contact regarding an empty property in Halcon and on membership of the Board and received replies.

Replies were promised to his further questions and statement on the Halcon North regeneration project.

4. Declaration of Interests

The following members declared a personal interest as a Council house tenant:

- Mrs Bunn
- Mrs Drage
- Mr Edwards
- Mr Etherington
- Mr Galpin

- Mrs Hegarty
- Mr Hellier
- Mrs Marshall
- Councillor Brooks

Councillor Bowrah declared a personal interest as a family member was a Council house tenant. Councillor Brooks declared a personal interest as family members were Council house tenants.

5. Supported Housing Service Development Action Plan 2012

Considered report previously circulated regarding an action plan to address the views and concerns of residents in supported housing.

The Supported Housing Manager explained the action plan was as a direct result of the consultation process over the past year to enable tenants to get involved in the development of housing related support services.

Members discussed travel claims and the payment of expenses.

Resolved to note the content of the report and the method for the payment of expenses.

6. Housing Revenue Account Reform Project Dashboard

Considered project progress dashboard report previously circulated, concerning planned reforms to council housing finance in England and the management of those changes by the Council.

The project overall remained on track.

Resolved to note the dashboard report.

7. Housing Revenue Account Business Plan 2012 – 2042

The Community Services Manager explained that the draft HRA Business Plan had been approved but the Council still awaited final figures from Government that would determine the final budget requirements and allow the business plan to be completed.

The modelling for the business plan now showed lower interest rates and a potential to repay the required new borrowing by year fifteen of the plan.

This had allowed a revision to the plan to provide a small fund to build two or three new homes each year on existing council land – and retain ownership within the HRA.

During the discussion of this item, members of the board made the following comments and asked questions. Responses are shown in italics:

- What rent increases were planned after 2014? *The Business Plan assumptions were that rents would increase by RPI + ½% after 20014/15;*
- Exeter City Council had been building new Council homes so why hadn't Taunton Deane? *Finance was the reason. If the council had borrowed money to build new homes then "right to buy" would leave the council with the loan repayments but only receiving one quarter of the sale proceeds;*
- Any new Council homes should be built to passive housing standards.

Resolved to note the progress towards finalising the business plan and support the principal of the small "home building" fund.

8. Consultation: Reinvigorating the Right to Buy and one for one replacement

Considered report previously circulated, concerning a draft response to the Government consultation on its proposals to increase the cap on Right to Buy discounts and options for meeting the commitment to ensure that every additional home sold under Right to Buy was replaced with a new home for Affordable Rent.

The proposals for tenants related to right to buy entitlement, discount level and cap. The proposals for councils covered costs of the system, methods for distribution of receipts and approach to provision of affordable homes.

Resolved to note the report and support the suggested responses to the consultation. .

9. Housing Estates Team Anti-Social Behaviour Performance

Considered report previously circulated, concerning performance of the Housing Estates Team on tackling and dealing with Anti-social Behaviour.

Housing Services aimed to ensure that tenants and other residents live peacefully within their own homes and communities. The service recognised that failure to tackle anti social behaviour effectively blighted the quality of life of those people living with anti social behaviour and can damage communities. Two estates officers had been employed in December 2010 to focus on tackling anti-social behaviour (ASB).

The Housing Estates Manager explained that the two new officers were now part of “circle of information” and had helped create the confidence that those complaining about anti social behaviour would be listened to.

A new voicemail service had recently been introduced to allow problems to be reported out of hours. Members discussed concerns that although anti social behaviour had reduced in some parts of Taunton there were still significant issues – and often over the weekend period.

Resolved to note the report

10. Council Housing Voids Performance

Considered report previously circulated, concerning void property performance in relation to council owned housing stock.

The report provided details of voids management and performance following the advice and assistance visit conducted by the Audit Commission in 2009. The commission identified a number of strengths and areas for improvement during their audit. The report was a main driver for the review of internal TDBC operational processes which was conducted in March 2011. Following the review a number of changes had been made to the Housing Estates Team.

The Housing Estates Officer explained how the surveying team conducted a physical inspection of each void property. They then prepared a works schedule and instructed contractors. The property was then re-let by the estates team. Overall void performance had improved with 75% accepted on first offer.

Members of the board discussed the issue of access to sites and annual gas inspections.

In response to a question on repair costs for damage, members heard that the majority of tenants leaving homes now had some form of repair recharge. Full figures would be provided.

Resolved to note the report

11. Domestic Abuse Policy, Domestic Abuse Service Standard and Witness Support Policy

Considered report previously circulated, concerning the new Domestic Abuse Policy, Domestic Abuse Service Standard, and Witness Support Policy for Taunton Deane Borough Council Housing Services.

The report outlined the strategic overview that tenants in council housing could expect from Housing Services on managing Domestic Abuse and Witness Support.

Members were highly supportive of the new policies and the approach being taken.

Resolved to approve the policies and service standard.

(The meeting ended at 8.55pm)

Declaration of Interests

Tenant Services Management Board

Taunton Deane Borough Council Housing Tenants – Councillor Brooks,
Mrs Bunn, Mrs Drage, Mr Edwards, Mr Etherington, Mr Galpin, Mrs Hegarty,
Mr Hellier, Mrs Marshall and Mrs Urquhart

Member of Somerset County Council – Councillor Brooks

Family member a Taunton Deane Borough Council Housing Tenant –
Councillor Bowrah and Councillor Brooks

AGENDA ITEM 6



HRA Reform Project Dashboard – February 2012

Phase 2: Agreement of Business Plan & Finalising Financial Arrangements

Status Of Project		Last Report	This Report	Comments
HRA Reform – Phase 2		G	G	
Status by Key Project Activities for Phase 1	Workstream Lead	Last Report	This Report	Comments
1. Treasury Management	Maggie Hammond	G	G	
2. Data Checking	Fiona Gudge	G	G	
3. Financial Control & Reporting	Paul Fitzgerald	G	G	
4. Affordable Housing	Martin Daly	G	G	
5. Polices/Best Practice	Martin Price	G	G	
6. Income Management	Stephen Boland	G	G	
7. Business Plan	Stephen Boland	G	G	
8. Stakeholder Engagement	Martin Price	G	G	
9. Assets	Phil Webb	G	G	
10. Baselineing/Benchmarking	Stephen Boland	G	G	

Key	
Red	Unsatisfactory progress – milestones & timescales not being met corrective action or re-plan required
Amber	Issues against some milestones but remedial action will keep project under control overall
Green	All milestones being met & project on target/completed

Key Accomplishments LAST Period
<p>Treasury Management –</p> <ul style="list-style-type: none"> • Significant work has been carried out on the financial model and what the borrowing portfolio would look like with Arlingclose, the Treasury Management advisors. • The Public Works Loan Board (PWLB) has shared a timeline on what it expects to happen and this has been shared with Southwest One. <p>Business Plan-</p> <ul style="list-style-type: none"> • CLG issued the final self financing settlement figures on the 31st January 2012. • The business plan and reports have been updated to reflect the final self financing settlement figure. • A Social Housing Development Fund is incorporated into the business plan and financial modelling. The allocation of funds of year 1 = £300k, years 2 and 3 = £500k, rising to £1m per year in year 4 for the purpose of a modest new build programme.

Financial Control & Reporting –

- CLG final determination was issued on the 31st January 2012 so draft Prudential Indicators and depreciation policies are now being finalised for approval by Executive and Full Council in February/March 2012.

Key Activities NEXT Period**Treasury Management –**

- Provide treasury management support at Community Scrutiny Committee on the 7th February 2012 and Executive on the 9th February 2012.
- Ensure that all is in place for the borrowing to take place on the 26th March 2012 and payment to DCLG on the 28th March 2012.

Financial Control & Reporting –

- CIH Business Plan has now been completed to include 2012/13 indicative budget figures and will continue to be updated as budget figures are finalised and approved by Members.
- HRA balance sheet 'component accounting' preparation will be finalized.

Taunton Deane Borough Council

Tenant Services Management Board – 20th February 2012

Consultation: Somerset Strategic Housing Partnership Interim Tenancy Strategy

Report of the Housing Services Lead
(This matter is the responsibility of Executive Councillor Jean Adkins)

1.0 Executive Summary

On 16th January 2012 the Somerset Strategic Housing Partnership published a consultation paper outlining proposals that will inform the creation of a new Interim Tenancy Strategy for Somerset.

This report lists the key consultation proposals to enable board members to comment on the questions posed by the consultation exercise at their meeting on the 20th February 2012.

2.0 Background

The Localism Act 2011 includes a number of changes relating to social housing provision and allocation, namely:

- Housing allocation reform;
- Housing tenure reform;
- Reform of homelessness legislation;
- Reform of Council Housing Finance;
- National Home Swap Scheme; and
- Reform of social housing regulation.

Within the provisions for housing tenure reform there is a requirement for local housing authorities to produce a Tenancy Strategy:

Section 150 Localism Act 2011

A local housing authority in England must prepare and publish a strategy (a "tenancy strategy") setting out the matters to which the registered providers of social housing for its district are to have regard in formulating policies relating to:

- (a) The kinds of tenancies they grant;
- (b) The circumstances in which they will grant a tenancy of a particular kind;
- (c) Where they grant tenancies for a term certain, the lengths of the terms; and
- (d) The circumstances in which they will grant a further tenancy on the coming to an end of an existing tenancy.

The five local housing authorities within Somerset are as follows:

- Mendip District Council;
- Sedgemoor District Council;
- South Somerset District Council;
- Taunton Deane Borough Council; and
- West Somerset Council

All five local housing authorities for Somerset have agreed, through the Somerset Strategic Housing Partnership, to produce a single tenancy strategy that all registered providers of social housing in Somerset will need to have regard to when framing and reviewing their own tenancy policies.

3.0 Key Interim Tenancy Strategy proposals

The Somerset Strategic Housing Partnership Interim Tenancy Strategy is intended to provide guidance to registered providers of social housing operating in Somerset, informing their policies and practices to produce lettings for customers that meet local housing need and improve market functioning in the County. The intention is that the tenancy strategy will also prove invaluable to policy makers and property professionals.

Proposal	Agree	Not agree
Social landlords will generally be expected to offer tenancies of general needs properties of no less than 5 years following a 12 month probationary period.		
Social landlords can only offer tenancies of less than 5 years, but no less than 2 years in exceptional circumstances, which must be clearly set out in the social landlord's tenancy policy.		

Proposal	Agree	Not agree
There is an expectation that social landlords will protect existing tenants' security as far as the regulations allow. Social landlords are expected to have a clear statement within their tenancy policy regarding the security of tenure they would offer a tenant transferring from another social landlord.		
Those social landlords who have a Homes and Community Agency agreement should have regard to affordability issues within the geographic area of the vacancy when deciding which properties to re-let at affordable rents and should state how they will do this within their tenancy policy.		
Social landlords should take into account the needs of vulnerable applicants (including families with children to avoid disruptive changes, older people, people with long-term illness or disability or a member of their household affected) when granting fixed term tenancy agreements, and make clear within their tenancy policies how this will be done.		
Social landlords will undertake a comprehensive appraisal of all fixed term tenancies before issuing Notice at the end of a fixed term tenancy.		
The key principles of the comprehensive appraisal will be developed with social landlords.		
The comprehensive appraisal will consider relevant options e.g. issuing a replacement tenancy, home ownership, property sale to the tenant, supported housing, housing in the private rented sector etc.		
There is a presumption that, following the comprehensive appraisal social landlords will renew the tenancy wherever appropriate.		
The expectation when re-issuing a tenancy, is that as a minimum, the existing tenure type will be maintained.		
Any new tenancy issued after an initial fixed term tenancy should have regard to an applicant's circumstances (vulnerability, financial etc) at the time of appraisal.		
Social landlords are expected to give at least 6 months notice to the tenant before the expiry of the tenancy if the social landlord will not be granting a new tenancy at the end of the fixed term. Where a tenancy will end, social landlords are expected to follow the existing Somerset Pre-Eviction Protocol.		

Proposal	Agree	Not agree
Social landlords must give the local authority Housing Options Team advance warning of the expiry of the tenancy if they do not wish to grant a new tenancy at the end of the fixed term.		
Social landlords will publish clear and accessible policies and procedures to support their tenancy policies.		
The local authority partners will develop robust mechanisms to monitor allocations against the strategic 'key principles'.		
Social landlords will provide relevant data to help with monitoring, which will include the number of complaints and requests for review.		
All partners will support the promotion of 'downsizing' through incentives and encourage social landlords and local authority landlords to review under-occupation at the end of fixed term tenancy.		
The strategy recognises the partnership of Homefinder Somerset. It is acknowledged that the strategic and operational groups will deal with any anomalies and issues arising from the implementation of the tenancy strategy and tenancy policies		
It is an expectation that all affordable rent and social rented properties will initially be advertised through Homefinder Somerset.		
It is expected that properties will be let in accordance with the way in which they are advertised.		

The above proposals will mean that properties will be available on the Homefinder Somerset Choice Based Lettings scheme at different rent levels and with different tenures depending on the social landlord arrangements with the HCA and social landlords own tenancy policies. Additional advert symbols (highlighting affordable rent and fixed term tenure) together with applicant guidance notes on affordable rent and fixed term tenure will be made available through the Homefinder Somerset CBL Scheme.

Existing tenants who remain in their existing homes will not be affected by affordable rent/tenure change, and will retain their security of tenure if they move to another social rented home. However they will reduce their security of tenure if they move to a home let at an affordable rent which also has a fixed term tenancy.

Mutual exchange tenants are protected within the Localism Act such that they will retain their security of tenure when they move, subject to the relevant guidance.

Following the consultation process the Somerset Strategic Housing Partnership is aiming to issue a final Interim Tenancy Strategy which will be available from April 2012.

Appendix 1 provides Tenant Services Management Board members with full details of the consultation proposals

4.0 Recommendation

- Tenant Services Management Board are requested to note the proposals to inform the creation of a new Interim Tenancy Strategy for Somerset; and
- Tenant Services Management Board members are asked for their comments on the key proposals.

Contact: Stephen Boland
Housing Services Lead
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e-mail: s.boland@tauntondeane.gov.uk



Somerset Strategic Housing Programme

Interim Tenancy Strategy

Consultation Draft

Document Approval

Group	Date
Core Group	1/12/11
Project Team	7/12/11
Core Group	14/12/11
SSHG for consultation	22/12/11

Version Control

Version	Author	Review	Reason For Issue	Date
0.5	Anne Harland & Tracy Vernon		1 st draft	29/11/11
1.0	AH/TV		As amended by Core Group meeting 1/12/11	2/12/11
1.1	AH/AD/Project Team		As amended by Project Team 7.12.11	8.12.11
1.2	AH/Core Group		As amended by Core team 14.12.11	14.12.11
1.2.1	AH/Core Group		Minor typo errors following Core group	5.1.12

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1. Context

1.1 Background

1.1.1 The Localism Act¹ includes a number of changes relating to social housing provision and allocation:

- Housing allocation reform
- Housing tenure reform
- Reform of homelessness legislation
- Reform of Council Housing Finance
- National Home Swap Scheme
- Reform of social housing regulation

1.1.2 Within the provisions for housing tenure reform is a requirement for local housing authorities to produce a Tenancy Strategy.

Section 150 Localism Act 2011

(1) A local housing authority in England must prepare and publish a strategy (a "tenancy strategy") setting out the matters to which the registered providers of social housing for its district are to have regard in formulating policies relating to-

- (a) the kinds of tenancies they grant*
- (b) the circumstances in which they will grant a tenancy of a particular kind,*
- (c) where they grant tenancies for a term certain, the lengths of the terms, and*
- (d) the circumstances in which they will grant a further tenancy on the coming to an end of an existing tenancy.*

The five local housing authorities within Somerset are as follows:

- Mendip District Council
- Sedgemoor District Council
- South Somerset District Council
- Taunton Deane Borough Council
- West Somerset Council

The Councils have agreed through the Somerset Strategic Housing Programme to produce a single Tenancy Strategy that all social landlords² need to have regard to when framing and reviewing their own Tenancy Policies.

1.2 Interim Tenancy Strategy

¹ Localism Act <http://www.legislation.gov.uk/ukpga/2011/20/contents/enacted> Part 7

² Social Landlords are Housing Associations and for the purposes of this document also include Taunton Deane Borough Council as a stock holding landlord.

1.2.1 In response to a request from social landlords within Somerset for interim guidance we have created an Interim Tenancy Strategy based on Key Principles developed by the Project Team to guide social landlords ahead of the finalisation of the revised Tenancy Standard (due for release in April 2012).

The agreed Key Principles are as follows:

- *Social landlords will generally be expected to offer tenancies of general needs properties of no less than 5 years following a 12 month probationary period.*
- *Social landlords can only offer tenancies of less than 5 years, but no less than 2 years, in exceptional circumstances, which must be clearly set out in the social landlords Tenancy Policy.*
- *There is an expectation that social landlords will protect existing tenants' security as far as the regulations allow. Social landlords are expected to have a clear statement within their tenancy policy regarding the security of tenure they would offer a tenant transferring from another social landlord.*
- *Those social landlords who have an HCA agreement should have regard to affordability issues within the geographic area of the vacancy when deciding which properties to re-let at Affordable Rents and should state how they will do this within their Tenancy Policy.*
- *Social landlords should take into account the needs of vulnerable applicants (including families with children to avoid disruptive changes, older people, people with long-term illness or disability or a member of their household affected by) when granting fixed term tenancy agreements, and make clear within their Tenancy Policies how this will be done.*
- *Social landlords will undertake a Comprehensive Appraisal of all Fixed Term Tenancies before issuing Notice at the end of a Fixed Term Tenancy.*
- *The key principles of the Comprehensive Appraisal will be developed with social landlords.*
- *The Comprehensive Appraisal will consider relevant options e.g. issuing a replacement tenancy, home ownership, property sale to the tenant, supported housing, housing in the private rented sector etc.*
- *There is a presumption that, following the Comprehensive Appraisal social landlords will renew the tenancy wherever appropriate.*
- *The expectation when re-issuing a tenancy, is that as a minimum, the existing tenure type will be maintained.*

- *Any new Tenancy issued after an initial Fixed Term Tenancy should have regard to an applicant's circumstances (vulnerability, financial etc) at the time of appraisal.*
- *Social landlords are expected to give at least 6 months notice to the tenant before the expiry of the tenancy if the social landlord will not be granting a new tenancy at the end of the fixed term.³ Where a tenancy will end Social landlords are expected to follow the existing Somerset Pre-Eviction Protocol.*
- *Social landlords must give the local authority Housing Options team advance warning of the expiry of the tenancy if they do not wish to grant a new tenancy at the end of the fixed term.*
- *Social landlords will publish clear and accessible policies and procedures to support their Tenancy Policies.*
- *The Local Authority partners will develop robust mechanisms to monitor allocations against the Key Principles.*
- *Social Landlords will provide relevant data to help with monitoring, which will include the number of complaints and requests for review.*
- *Partners to this Interim Tenancy Strategy support the promotion of 'downsizing' through incentives and encourage social landlords and Local Authority Landlords to review under-occupation at the end of Fixed Term tenancy.*
- *This Strategy recognises the Partnership of Homefinder Somerset. It is acknowledged that the Strategic and Operational groups will deal with any anomalies and issues arising from the implementation of the Tenancy Strategy and Tenancy Policies.*
- *It is an expectation that all Affordable Rent and social rented properties will initially be advertised through Homefinder Somerset.*
- *It is expected that properties will be let in accordance with the way in which they are advertised.*

1.2.2 The Interim Tenancy Strategy takes account of the draft Tenancy Standard that is currently out for consultation.⁴ Once this revised standard is released we would seek to finalise our Strategy taking into account any changes that have been made, the Revised Guidance on Allocations and results of social landlords Tenancy Policy Pilot Schemes together with responses from the consultation on the Interim Tenancy Strategy. We hope to issue the finalised Tenancy Strategy by the end of June 2012.

³ Localism Act 2011 Part 7, Chapter 2 Section 154, 107D (3)

⁴ <http://www.tenantservicesauthority.org/server/show/conWebDoc.21636>

- 1.2.3 The Somerset Strategic Housing Programme) is a framework of strategic housing projects aimed at achieving substantial improvements within housing in Somerset by collaborative working both within local authorities and with our partners.
- 1.2.4 The principle of joint working has long been established within the strategic housing function across Somerset. The Programme builds on this solid foundation to seek the most sustainable and cost-effective structures for delivering housing services across Somerset, maximising benefits of scale whilst also delivering good quality, locally based services.
- 1.2.5 It has long been recognised that Strategic Housing is important to maximising opportunities to improve the Health and Wellbeing of people living and working in Somerset. Strategic Housing provides opportunities for people to live in decent, warm & affordable homes, whether new-build, social housing or in the private sector, or in sustainable communities. Strategic housing also ensures that current & future housing is sustainable by developing housing that is affordable, reducing homelessness & improving access to services for vulnerable adults.
- 1.2.6 The Interim Tenancy Strategy has taken account of the existing countywide Homelessness Strategy (2008-11)⁵ which is currently being updated. A countywide Housing Strategy Framework is in development and will take account of this Interim Tenancy Strategy.
- 1.2.7 All the Somerset authorities will in some way be impacted by the proposed development of the Hinkley Point C nuclear power station (if full planning permission is granted) The housing markets in the Sedgemoor, West Somerset and Taunton Deane Housing Authority areas will be most dramatically affected by this development.
- 1.2.8 EDF Energy’s workforce assumptions regarding the scale of temporary workforce are that the lifetime of the project is likely to require some 26,600 full time equivalent (FTE) workers across the lifetime of the build project with a peak of 5600 FTE on site by 2016. Of this number it is agreed that an estimated 34% could be home-based leaving 66% (approximately 3700 workers) requiring accommodation in the local area. The analysis undertaken by EDF includes geographic areas represented by a sixty minute travel zone to Hinkley Point and includes Sedgemoor, West Somerset, Mendip and Taunton Deane.⁶
- 1.2.9 All the Somerset Housing Authorities aim to make best use of existing resources to try to ensure that there is a sufficient supply and range of decent accommodation to meet demand. Any development such as Hinkley Point needs to be considered in the context of local needs in order to avoid exacerbating pressures on provision of housing.

⁵ Making Homes, Helping People Changing Lives (Somerset Homelessness Review & Prevention Strategy 2008-2011) <http://www.westsomersetonline.gov.uk/getattachment/Housing/Housing-Strategies-and-Policies/Somerset-Homeless-Review-Strategy.pdf.aspx>

⁶ [EDF Energy Proposed Development at Hinkley Point – Additional Information](#)

- 1.2.10 In 2008 the Strategic Housing Market Assessment highlighted data from 2006 to show a demand in the private rented sector from households aged under 30 years old. More recent data from Homefinder Somerset supports this finding although there are still high levels of demand from the 30s to 40s age bracket. This heightens concern that the demand from Hinkley workers for accommodation will have a particular impact on the under 40s who are reliant on low cost accommodation in the affected areas.⁷
- 1.2.11 Analysis of the Homefinder Somerset register has shown that the profile of applicants shows a majority are 1 and 2 person households. The Tenancy Strategy will need to focus on ensuring that these groups are not disadvantaged by conversions to Affordable Rents. Particularly since this same group will be affected by the demand for private sector accommodation introduced by the proposed Hinkley Point power station and it is in the lower bedroom sizes that Local Housing Allowance (LHA) rates usually exceed 80% market rents.
- 1.2.12 The analysis of Homefinder Somerset property advert data has also shown that 1 and 2 bedroom properties make up the majority of property adverts. The strategy may further need to determine if these properties make up the larger share of Affordable Rented lets and if so for what length of tenure. Single applicants will be further affected by the changes to LHA rates in January 2012 when the shared accommodation rate that currently applies to single people under the age of 25 living in private rented accommodation will be extended to people aged under 35. This could leave many single applicants in private rented accommodation that they cannot afford and place further demands on the supply of social/affordable rented accommodation.
- 1.2.13 Where larger family homes (3 / 4 bed and above) are advertised at Affordable Rent levels then the flexible tenancy may need to be longer to reflect the family nature of the accommodation. To avoid shortfalls in benefits the Strategy will focus on reducing the Affordable Rent percentage in the larger properties across those districts. Under Government changes to Housing Benefit Regulations for under 35s the single room rate will extend from under-25 year olds to under-35 year olds. This will see an increase in people seeking shared accommodation and an overall reduction in single persons under 35 seeking, or being able to afford, self contained accommodation from January 2012.⁸

1.3 Methodology

- 1.3.1 Building on the strong relationships that already exist between the Somerset Local Housing Authorities and the social landlords, the Interim Tenancy Strategy was developed collaboratively by involving both social landlords and other key stakeholders, especially in the production of the Key Principles. This has been

⁷ EDF (2011) Draft Accommodation Strategy

⁸ http://www.direct.gov.uk/en/N11/Newsroom/DG_192415

achieved through a Project Team formed in July 2011. The team was made up of the following organisations:

- Mendip District Council (Project Sponsor, and representing the Somerset Enablers Group)
- South Somerset District Council
- Sedgemoor District Council
- West Somerset Council (representing Somerset Homeless Managers Group)
- Yarlinton Housing Group
- Hastoe Housing Association
- Homes in Sedgemoor (ALMO for Sedgemoor District Council)
- Taunton Deane Borough Council - Landlord
- Knightstone Housing Association
- Raglan Housing Association
- Flourish Homes
- Magna West Somerset Housing Association
- Shelter
- South Somerset CAB

In developing this Interim Tenancy Strategy together we have had regard to our Homefinder Somerset CBL partnership allocation scheme⁹ and the existing homelessness strategy.

1.3.2 Partners to this Interim Tenancy Strategy recognise that a strategy alone is insufficient. Strong and effective partnerships will be important to the implementation and monitoring of both the final Tenancy Strategy and individual social landlord tenancy policies. Joint working is also required to ensure that any risks and unintended consequences are addressed promptly and effectively within the review mechanism for this Tenancy Strategy.

1.3.3 The evidence to support the Interim Tenancy Strategy is listed within Appendix 2.

1.4 Aim of this Strategy

1.4.1 The Tenancy Strategy is intended to provide guidance to social and other landlords operating in Somerset, informing their policies and practices to produce lettings for customers that meet local housing need and improve market functioning in the County. It should also prove invaluable to policy makers and property professionals.

1.5 Scope of the Strategy

1.5.1 This Interim Tenancy Strategy covers the following key areas regarding social landlords:

- a) the kinds of tenancies they grant;

⁹ Homefinder Somerset Allocations Policy <http://www.homefindersomerset.co.uk/Data/ASPPages/1/107.aspx>

- b) the circumstances in which they will grant a tenancy of a particular kind;
- c) where they grant tenancies for a fixed term, the lengths of the terms; and
- d) the circumstances in which they will grant a further tenancy on the coming to an end of an existing tenancy.

1.5.2 We have structured the Interim Tenancy Strategy around agreed Key Principles that summarise the issues that social landlords should have regard to when framing their own tenancy policies.

1.6 Governance

1.6.1 Individual social landlords are responsible for their own Tenancy Policies. We have also set out in appendix 1¹⁰ the details of where the tenancy policies of social landlords operating within the Somerset area can be found. We propose that the Homefinder Somerset Monitoring Board will be responsible for monitoring and reviewing the Interim Tenancy Strategy on behalf of the Somerset local housing authorities.

1.6.2 The key evidence supporting the principles behind the Interim Tenancy Strategy will be reviewed before the final Tenancy Strategy is produced. Once finalised the Strategy (and the evidence supporting it) will be reviewed every three years¹¹ with the results being discussed by the Homefinder Somerset Monitoring Board and that Board recommending changes to the Somerset Strategic Housing Partnership.

1.6.3 The review of evidence moving forward will include (but not be limited to) monitoring of trends in:

- Housing needs
- Homelessness (aligning with Homeless Strategy)
- Reviewing effectiveness of allocation policy (and aligning with any changes)
- Rent levels across all tenures
- Social landlords activity
- Number of new homes built including affordable, and which tenure(s)
- Changing trends in housing and benefit paid, including proposals for the Universal Credit
- Lettings of Affordable Rents including number of bids and acceptances
- Outcomes of Reviews e.g. number tenancies re-issued, no of under occupied properties recycled
- Site viability

¹⁰ Localism Act 2011 Part 7, Chapter 2 Section 150 (2)

¹¹ Localism Act Part 7, Chapter 2 section 150 (5).

1.7 Legal Context

1.7.1 Alongside the requirements of the Localism Act, the Homes and Community Agency (HCA) is working to agree programmes for the delivery of new affordable housing over the next 4 years with social landlords. All new homes built with HCA subsidy are expected to be offered at Affordable Rents - up to 80% of the market rent. In addition social landlords may increase rents on a percentage of re-let properties. social landlords are also encouraged to take a more proactive approach to managing their stock, including disposal of stock where this will release funds to invest in new homes.

1.7.2 The Interim Tenancy Strategy has adopted the definition of Affordable Housing as set out in the draft National Planning Policy Framework (or subsequent updates of that definition in the National Planning Policy Framework) which replaces PPS3 and states that Affordable Housing is;

‘Affordable housing: Social rented, Affordable Rented and intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices. Affordable housing should include provisions to remain at an affordable price for future eligible households or for the subsidy to be recycled for alternative affordable housing provision.’

- *Social rented housing* is owned by local authorities and private registered providers, for which guideline target rents are determined through the national rent regime. It may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Homes and Communities Agency.
- *Affordable Rented housing* is let by local authorities or private registered providers of social housing to households who are eligible for social rented housing. Affordable Rent is subject to rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable).
- *Intermediate housing* is homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition above. These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not Affordable Rented housing.¹²

1.7.3 Social landlords who have entered into a contract with the HCA to deliver new homes will be able to offer fixed term tenancies at Affordable Rents with a minimum 5 year length¹³ as well as life time tenancies at Affordable Rents on new properties and conversion of some of their existing stock. The Government has stated that only

¹² Draft National Planning Policy Framework Glossary

<http://www.communities.gov.uk/documents/planningandbuilding/pdf/1951811.pdf>

¹³ A 2 year minimum period may be used in exceptional circumstances.

<http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A Final Directions (2)(4)(a)

in exceptional cases will the term be less than five years and these circumstances would need to be set out within the social landlords' Tenancy Policy.¹⁴

- 1.7.4 Social landlords who are not developing, or developing without HCA resources can either continue to offer assured lifetime tenancies or flexible tenancies from April 2012.
- 1.7.5 Social landlords will continue to be able to offer introductory tenancies.
- 1.7.6 These changes will mean that properties will be available on the Homefinder Somerset Choice Based Lettings scheme at different rent levels and with different tenures depending on the social landlord arrangements with the HCA and social landlords own tenancy policies. Additional advert symbols (highlighting Affordable Rent and fixed term tenure) together with applicant guidance notes on Affordable Rent and fixed term tenure have been made available through the Homefinder Somerset CBL scheme. [the relevant link to the Homefinder website will be inserted when available]
- 1.7.7 Existing tenants who remain in their existing homes will not be affected by Affordable Rents/tenure change, and will retain their security of tenure if they move to another social rented home. However they will reduce their security of tenure if they move to a home let at an Affordable Rent which also has a Fixed Term Tenancy¹⁵.
- 1.7.8 Mutual exchange tenants are protected within the Localism Act¹⁶ such that they will retain their security of tenure when they move, subject to the relevant Guidance.

1.8 Consultation

- 1.8.1 The Localism Act 2011 requires that Local Housing Authorities consult with social landlords and other agencies on the content and give them a reasonable opportunity to comment.¹⁷
- 1.8.2 We propose to issue the Interim Tenancy Strategy for consultation comment in January 2012 with a view to having a final Interim Tenancy Strategy available by April 2012.

2. The Evidence Base

- 2.1 We have included at Appendix 2 evidence that we believe supports the Key Principles we have included within the Interim Tenancy Strategy. The evidence

¹⁴ <http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A Final Directions (2)(3)(d)

¹⁵ Final Direction on Tenure <http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A (2)(4)(d)

¹⁶ Localism Act 2011 Part 7, Chapter 2, Section 158 (9)

¹⁷ Localism Act 2011 Part 7, Chapter 2 Section 151

referred to seeks to provide information about the local housing markets that operate within Somerset together with other national indicators.

3. Interim Tenancy Strategy Key Principles

3.1 Length of Fixed Term Tenancy

- 3.1.1 ***Social landlords will generally be expected to offer tenancies of general needs properties of no less than 5 years following a 12 month probationary period.***
- 3.1.2 ***Social landlords can only offer tenancies of less than 5 years, but no less than 2 years, in exceptional circumstances, which must be clearly set out in the social landlords Tenancy Policy.*** The social landlord will be expected to demonstrate within their Tenancy Policy, how any tenancy of less than five years can be managed in order to minimise adverse impact on local community cohesion, the sustainability of that community and homelessness. An Equality Analysis will also be required in order to show how any adverse impact on the vulnerable groups will be prevented.¹⁸
- 3.1.3 ***There is an expectation that social landlords will protect existing tenants' security as far as the regulations allow.*** Social landlords are expected to have a clear statement within their tenancy policy regarding the security of tenure they would offer a tenant transferring from another social landlord.¹⁹
- 3.1.4 The Somerset Strategic Housing Partnership Affordable Housing Programme 2011-2015 Investment Policy (paragraph 18.14) sets out guidelines on creating and maintaining stable, mixed and balanced communities, encouraging social landlords to provide minimum period tenancies appropriate to the needs of the household, dwelling type and location within Somerset.²⁰
- 3.1.5 Collectively the five Somerset Local Authorities together with social landlords agreed that a flexible non prescriptive approach on fixed term tenancies should be adopted, with a minimum of five years following a 12 month probationary period. This will allow a reasonable length of security to enable some tenants to plan ahead taking account of future options. Allowing social landlords the freedom to allocate more flexible tenancies based on local need within each of the five districts but retaining the discretion to offer tenancies on a lifetime basis. Combined with an Affordable Rent model social landlords will be able to offer a range of housing options, whilst raising extra rents to invest in new building.

3.2 Affordable Rents

¹⁸ <http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A Final Directions (2)(3)(d)

²⁰ See [Somerset Strategic Housing Partnership Affordable Housing Programme 2011 – 2015 Investment Policy Guidelines](#)

²⁰ See [Somerset Strategic Housing Partnership Affordable Housing Programme 2011 – 2015 Investment Policy Guidelines](#)

3.2.1 ***Those social landlords who have an HCA agreement should have regard to affordability issues within the geographic area of the vacancy when deciding which properties to re-let at Affordable Rents and should state how they will do this within their Tenancy Policy.***²¹

3.2.2 The Interim Tenancy Strategy has adopted the definition of Affordable Housing as set out in the draft National Planning Policy Framework (as set out in section 1.7.2).

3.2.3 Affordable Rents must be no more than 80% of market rents, including service charges. When setting an Affordable Rent, Landlords should have regard to LHA rates within the area of the property being let.

3.2.4 We have not provided any definition of affordability within this Interim Tenancy Strategy but would expect social landlords to have regard to the evidence provided at Appendix 2 regarding affordability issues and availability of private rented accommodation when setting their Affordable Rent levels.

3.3 Vulnerable Groups

3.3.1 ***Social landlords should take into account the needs of vulnerable applicants (including families with children to avoid disruptive changes, older people, people with long-term illness or disability or a member of their household affected by) when granting fixed term tenancy agreements, and make clear within their Tenancy Policies how this will be done.***²² In addition when issuing and reviewing tenancies social landlords should have regard to the long term housing needs of vulnerable groups, including those that require adapted properties.

3.3.2 This principle ties in closely with the existing Sub-Regional Homelessness Strategy – ‘Making Homes, Helping People, Changing Lives (Somerset Homelessness Review & Prevention Strategy 2008-2011) sets out the local strategic aims to achieve positive outcomes in the support for vulnerable people. The action plan to prevent homelessness focuses on the following key priorities²³:

- Floating support services
- Homeless prevention
- Improved access to the Private Rented Sector
- Improved access to appropriate housing
- Improve protocols and partnerships to tackle homelessness

3.3.3 In addition the South West Regional Housing Strategy 2005-2016 supports action to tackle homelessness and to reduce the use of Temporary Accommodation through

²¹ See [Shelter Private Rent Watch - Report one: Analysis of local rent levels and affordability October 2011](#)

²² <http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A Final Directions (2)(3)(g)

²³ <http://www.westsomersetonline.gov.uk/getattachment/Housing/Housing-Strategies-and-Policies/Somerset-Homeless-Review-Strategy.pdf.aspx> Action plan page 56 onwards.

investment in new social rented housing and by promoting positive models of prevention and address homeless prevention services for vulnerable groups.²⁴

3.4 Comprehensive End of Tenancy Appraisal

3.4.1 *Social landlords will undertake a Comprehensive Appraisal of all Fixed Term Tenancies before issuing Notice at the end of a Fixed Term Tenancy.*²⁵

3.4.2 *The key principles of the Comprehensive Appraisal will be developed with social landlords.* Both the LA partners and social landlords could benefit from a structured approach to housing options advice. The Homefinder Somerset system provider (Abritas) facilitates housing options advice provision through a system module that can be tailored to provide applicants and tenants with a printed housing options report, setting out the next steps they would need to take regarding their housing. This could be used as part of the 'End of Tenancy Appraisal' to provide social landlords with a clear decision path for sustaining tenancies and tenants with clear housing options advice.

There are two ways in which this may be utilised:

Initial presentation for housing advice

The applicant presents to the LA requesting housing options advice or to join the register. Before they can join the register the applicant is invited to complete a housing options online questionnaire which will then alert them to the best housing option available and include an indication (based on their circumstances) of how long they may have to wait if they joined the housing register. This will help to manage expectations and also highlight to applicants the other options available.

Tenancy Assessment for Flexible Tenancy

When a tenant is coming up to their 6 months assessment period with a landlord, Homefinder Somerset will flag up to landlords that a 6 month assessment is required, from the data logged when the applicant was initially housed.

The landlord is required to provide housing options advice to the tenant but may wish to extend the tenancy if the review proves successful. In these circumstances the tenant can complete the housing options assessment. This assessment will look at the following:

- financial circumstances to see if they can afford a different housing options
- Household size
- Medical/welfare issues

²⁴ <http://www.swslim.org.uk/documents/themes/lt12-housingstrategy.pdf>

²⁵ <http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A Final Directions (2)(3)(e)

- Any other key circumstances

Once completed the assessment can then advise the applicants of other possible housing options that would suit their circumstances (including 80% market rents) OR justify the landlord in issuing a new tenancy.

Landlords can have a PDF copy of the housing options report to attach to the tenancy file within their housing management systems if necessary (as a record) and access the housing options module (including its set up) for an increase in the advert fee or a one off charge.

3.4.3 ***The Comprehensive Appraisal will consider relevant options e.g. issuing a replacement tenancy, home ownership, property sale to the tenant, supported housing, housing in the private rented sector etc.***²⁶

3.4.4 There is a great deal of uncertainty around how frequently fixed term/flexible tenancies will be renewed. This is likely to depend on a number of factors, including the:

- i. criteria social landlords adopt for their lettings policies; and
- ii. the circumstances of tenants that are granted flexible tenancies and the way these evolve over the period before reviews.

3.4.5 One of the grounds that might lead landlords to decide not to renew a flexible tenancy could be a large and sustained increase in income. Other grounds could include household composition, e.g. number of inhabitants and their age, and suitability of accommodation. Factors that could be taken into account in renewing a flexible tenancy might include age of occupiers, having dependent children, and health of the tenant.²⁷ Further examples are set out below.

²⁶ <http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A Final Directions (2)(3)(h)

²⁷ Amended from work done by St Edmundsbury DC

<http://www.stedmundsbury.gov.uk/sebc/say/pdf/PublicConsultation/110915TS%20Consultation%20Final.PDF>

Criteria	Explanatory Notes
Property under occupied	Potentially tenants, such as young couple or families may be allowed to under occupy in order to allow the family to grow into the house and have a firm base in the area. A range of occupation levels may also help contribute to balanced communities.
Property over occupied	To prevent low quality housing conditions developing.
Suitability of property	Is this property/services/facilities still suitable for the current tenant?
When a tenant requires re-housing in a more suitable/appropriate location	This scenario is likely to be picked up and dealt with through housing management measures before the need not to renew a tenancy occurs. Examples might include Domestic Abuse cases/witness protection/antisocial behaviour
Tenant change in circumstances	For example when a tenant has demonstrably a high enough income to comfortably afford (for example purchase) market housing and arguably the affordable house would be better used by somebody in greater need.

3.4.6 ***There is a presumption that, following the Comprehensive Appraisal social landlords will renew the tenancy wherever appropriate,***

3.4.7 It is generally accepted that creating high turnover in the housing stock is not desirable – for the local authority keeping people in established communities is more sustainable and for the social landlords it helps to keep costs down for their business model. Therefore the occurrences when tenancies are not renewed (i.e. granting a new fixed term/flexible tenancy at the end of the original term) are likely to be the exception and not the rule. This will also be important in ensuring that homelessness is minimised (one of the principle reasons for homelessness is the termination of existing AST tenancies in the private sector).

3.5 Renewing a Tenancy

3.5.1 ***The expectation when re-issuing a tenancy, is that as a minimum, the existing tenure type will be maintained.*** Principle 3.3 would still apply in terms of addressing the needs of vulnerable groups.

3.5.2 ***Any new Tenancy issued after an initial Fixed Term Tenancy should have regard to an applicant's circumstances (vulnerability, financial etc) at the time of appraisal.***

3.6 Notice Period

- 3.6.1 Legal requirements to end a tenancy will be a matter for the social landlord concerned but social landlords will be expected to refer to the following key principles when ending tenancies.
- 3.6.2 ***Social landlords are expected to give at least 6 months notice to the tenant before the expiry of the tenancy if the social landlord will not be granting a new tenancy at the end of the fixed term.²⁸ Where a tenancy will end social landlords are expected to follow the existing Somerset Pre-Eviction Protocol***
- 3.6.3 ***Social landlords must give the local authority Housing Options team advance warning of the expiry of the tenancy if they do not wish to grant a new tenancy at the end of the fixed term.***
- 3.6.4 The advance warning process will be developed as part of the Comprehensive Tenancy Appraisal.
- 3.6.5 The Governments latest figures on statutory homelessness in England show that there has been an increase in the number of households applying to councils for help with re-housing (an increase of 14% in the last year). There has also been a 26% increase in the number of households accepted as homeless who are still waiting for re-housing by the local authority.²⁹
- 3.6.6 Analysis of Somerset homeless statistics shows that termination of AST private sector tenancies is the biggest reason for homelessness and is increasing when compared to 2010-11.³⁰

3.7 Appeals /Reviews Offers/Notice

- 3.7.1 Social landlords should set out in their Tenancy Policy the way in which the tenant or prospective tenant may appeal against or complain about the length of fixed term tenancy offered and the type of tenancy offered, and against a decision not to grant another tenancy on the expiry of the fixed term.³¹
- 3.7.2 Social landlords will also be responsible for dealing with any requests for a review of their decision to end a fixed term tenancy or on the length of tenancy offered to a prospective tenant under Section 154, 107B of the Localism Act.³² . We would expect the processes for these requests to be made clear in social landlords Tenancy Policies.

²⁸ Localism Act 2011 Part 7, Chapter 2 Section 154, 107D (3)

²⁹ <http://www.communities.gov.uk/publications/corporate/statistics/homelessnessq22011>

³⁰ Somerset P1E Homeless Statistics

³¹ <http://www.communities.gov.uk/documents/housing/pdf/2017529.pdf> Annex A Final Directions (2)(3)(f)

³² Localism Act 2011 Part 7, Chapter 2 Section 154, 107B

3.8 Monitoring

3.8.1 ***Social landlords will publish clear and accessible policies and procedures to support their Tenancy Policies.***

3.8.2 ***The Local Authority partners will develop robust mechanisms to monitor allocations against the Key Principles.***

3.8.3 ***Social Landlords will provide relevant data to help with monitoring, which will include the number of complaints and requests for review.***

3.9 Conversions of Social Rented Housing Stock to Affordable Rent and Disposal of Affordable Homes

3.9.1 Consultation with the Local Housing Authority on the detail of any conversion is required. This consultation by social landlords is seen as crucial to enable the Local Housing Authority to ensure that a sustainable mix of housing is maintained locally. See Appendix 2: RP Guidelines

3.9.2 Registered Providers should have regard to the following when considering the proportion of properties which will be re-let at an 'Affordable Rent':

- The pattern of re-lets by location, property size and type.
- The need to ensure that under-occupiers wishing to downsize are not put off by having to pay a higher rent or being given reduced tenancy rights.
- The need to ensure a reasonable supply of family-sized accommodation at social rents.
- The need to ensure that properties in rural areas can be let to those working in the area on low wages.
- The shortage of wheelchair accessible accommodation.

3.9.3 We will support disposals to the open market subject to the agreement of the social housing regulator, where the provider has completed an options appraisal and can demonstrate a clear benefit.³³

3.10 Mobility

3.10.1 The Tenancy Strategy encourages Social Landlords to promote and assist tenants who need to move to other properties, to find their own solutions, and to make best use of existing stock

³³ See [Somerset Strategic Housing Partnership Affordable Housing Programme 2011 – 2015 Investment Policy Guidelines](#)

3.11 Down sizing and Under Occupation

3.11.1 *Partners to this Interim Tenancy Strategy support the promotion of ‘downsizing’ through incentives and encourage social landlords and Local Authority Landlords to review under-occupation at the end of Fixed Term tenancy.*

3.12 Choice Based Lettings

3.12.1 *This Strategy recognises the Partnership of Homefinder Somerset. It is acknowledged that the Strategic and Operational groups will deal with any anomalies and issues arising from the implementation of the Tenancy Strategy and Tenancy Policies.*

It is an expectation that all Affordable Rent and social rented properties will initially be advertised through Homefinder Somerset.

It is expected that properties will be let in accordance with the way in which they are advertised.

3.12.2 The Interim Tenancy Strategy will meet the requirements of the Equality Act 2010.

3.12.3 An Equality Analysis on the Interim Tenancy Strategy will be undertaken as part of the consultation exercise. Any issues highlighted by the Equality Analysis will be incorporated within the Final Tenancy Strategy.

4. Action Plan

4.1.1 The Interim Tenancy Strategy and the final version of the Tenancy Strategy when it is available will need to evolve as circumstances dictate. A number of the key principles identified within this document have highlighted the need for further work. These pieces of work are included at appendix 3.

4.1.2 The Tenancy Strategy will be reviewed every 3 years by the LA partner authorities.

Appendix 1 – Details of where Social Landlord tenancy policies can be found.

We will place a link to your homepage on the Homefinder Somerset website and it will be Social Landlords responsibility to ensure that their Tenancy Policy is available on their website by 1st April 2012.

Consultation Draft

Appendix 2 – The Evidence Base

1. Somerset Strategic Housing Partnership Affordable Housing Programme 2011 – 2015 Investment Policy Guidelines

Introduction

1. The comprehensive spending review in October 2010 significantly reduced the direct investment available from the Homes and Communities Agency (HCA) and introduced a new product, Affordable Rent. The affordable homes programme 2011 – 2015 replaces the national affordable homes programme (NAHP).
2. This document covers investment policy guidelines, giving a clear indication of the expectations and wishes of the Local Housing Authorities. Specific guidance for providers is set out in section 18, but should not be taken as prescriptive.

HCA framework

3. The HCA's affordable homes programme 2011 – 15 framework, released on 14th February, required Registered Providers to produce and submit by 3 May 2011 a 4 year programme for the delivery of affordable housing. Once the package of funding is agreed between the Registered Provider and the HCA they will sign a Contract committing to delivery for homes to be completed by March 2015. Contracts are due to be signed by the end of September 2011. A short form of the Contract will also be signed by those Registered Providers not in receipt of funding but wishing to provide the Affordable Rent product without subsidy.
4. The framework is intended to:-
 - Meet housing need at a local level
 - Provide a more flexible offer for social housing tenants
 - Ensure that public funds (and funds generated from re-lets resulting in Affordable Rent) are properly and effectively spent
 - Maximise delivery of new affordable housing supply through the introduction of the new Affordable Rent product and other means and
 - Ensure quality standards are maintained
5. The HCA framework places the onus on Registered Providers to raise capital for new affordable housing supply. In future access to the reduced government subsidy is directly linked to a Registered Provider's willingness to incorporate Affordable Rent into their business plans for both new homes and for a percentage of their existing homes when re-let (conversions).

Affordable Rents

6. The new Affordable Rent product requires homes to be let at 'up to' 80% of market rent. This guidance is the basis on which Registered Providers are expected to raise capital for new affordable homes and is the basis on which they will qualify for HCA subsidy.
7. For context Social Rents in Somerset are generally well below 80% prevailing market rates, although the % varies according to size of property and location. As an

example some quick and dirty analysis of social rents in South Somerset give the following averages;

- One bedroomed flat – 81% (note actually higher than Affordable Rent model)
 - Two bedroomed flat – 66%
 - Two bedroomed house – 65%
 - Three bedroomed house – 57%
 - Four bedroomed house – 43%
8. The above figures quote averages across the district. Affordable Rents will be calculated based on an RICS valuation of what the same property would command as an open market rent. It is therefore reasonable to assume that variations will also exist according to the exact locale – for example between different neighbourhoods and between urban and village locations.
9. It should be noted that the Affordable Rent is effectively capped by the Local Housing Allowance (LHA) limit which applies to Housing Benefit claims. From June 2010 the LHA has been based on the 30th per centile of (available) market rents in a broad housing market areas. It is unlikely that 80% prevailing market rents will be above the LHA, except in the case of 5 or more bedrooms as the 4 bed LHA will apply – although we already have one case in South Somerset where the 80% rent is forecast as marginally above the LHA.

Four year programme

10. The four year programme will reflect specific existing commitments and the current affordable housing delivery pipeline in the first 2 years with unnamed schemes in the latter 2 years. the programme will be developed through partnership based on capital finance generated and HCA subsidy.
11. The HCA will assess Registered Providers capacity to deliver across the whole of their business plans and will moderate on a national basis.
12. The Framework puts the onus on Registered Providers to work in close collaboration with Local Authorities across their housing areas to develop their programmes in accordance with Local Investment Plans and local housing need.

Strategic Tenancy Policies

13. Under the Localism Bill, assuming it is passed in its current form, authorities will be required to put in place strategic tenancy policies by April 2012. These will guide social landlords as to how they will develop their programmes, manage their assets and let their properties.
14. The five Somerset Local Housing Authorities (Somerset Housing Partners) through the Somerset Strategic Housing Partnership) are seeking to create a single Strategic Tenancy Policy that will reflect local circumstances, with overarching principles that underpin the countywide investment plans. This has been prioritised by the Shared Housing Programme Board as a project to commence in early June using a project team heavily drawn from the Homefinder Somerset Monitoring Board, reflecting the need to integrate well with our county wide Choice Based Lettings scheme.
15. Our strategic tenancy policy must reflect both identified need and the process through which lettings are made. All registered providers and the Housing Authorities must work together to ensure a continuous, fair and equitable provision of affordable housing is delivered to meet the needs of tenants and allow for flexibility and opportunity for tenants to progress from social housing into home ownership and to facilitate movement to support economic growth.
16. Registered Providers will be required to develop their lettings policies having regard to the strategy adopted by the relevant Housing Authority. Co-operating on a county wide basis to produce a single strategy will make this easier for most Associations, although there will still be dissimilarities between ours and neighbouring authorities, e.g. Wiltshire, West Dorset, North Devon etc.
17. It should be noted that some Registered Providers have already formulated their tenancy strategies as lettings under Affordable Rent will commence in advance of April 2012. Where possible it is expected that cyclical reviews of these policies should take into consideration the issues raised in this document and the guidelines set out below.

Guidelines for Registered Providers

18. The following are to be taken as guidelines, giving a clear indication of the expectations and wishes of the Local Housing Authorities but without being prescriptive.
 - 18.1. Existing countywide planning policies require that affordable housing delivered through S106 agreements should not require public subsidy.
 - 18.2. Where it is confirmed that a scheme is not viable to deliver without public subsidy, a minimum level of affordable housing will be expected through planning obligation alone and it is likely that social rent housing will remain the major component of this, possibly supplemented by some shared ownership.
 - 18.3. Both the developer and the Housing Association partner will then seek public subsidy to complement the affordable housing delivered through planning gain alone. Where this public subsidy is secured through the HCA, or a combination of HCA and Local Authority funds, it is likely that Affordable Rent will be the major component.
 - 18.4. We will not normally support conversions of social rent and shared ownership units which were delivered (or due to be delivered) through existing s106 agreements to Affordable Rent where the S106 agreement or other legal covenants state that the

affordability/tenure of those units to remain as social rent or shared ownership or where other similar legal restrictions apply to previously delivered schemes.

- 18.5. Conversion of existing social rent dwellings which have previously been developed using subsidy (grant and/or free/reduced land) only from the Local Housing Authority (e.g. with no additional public subsidy being forthcoming from the HCA) will ordinarily be subject to the approval of that Authority. The Housing Authority may require either direct re-investment within the same District or repayment of the subsidy which was directly attributable to that Authority.
- 18.6. Where social housing has been acquired by a Housing Association from the sponsoring Council through Large Scale Voluntary Transfer (LSVT) it is possible that the detail of the transfer agreement restricts the loss of such dwellings from social rent except through the exercise of the Preserved Right To Buy. Any request to vary an LSVT agreement to allow for Affordable Rents will only be considered by the relevant Local Housing Authority if the Registered Provider can demonstrate that detailed consultation with the appropriate tenants has been undertaken.
- 18.7. We will support the conversion of social rent tenancies when the property becomes void to Affordable Rent or New Build Home Buy (unless there is a restriction in the S106 agreement or other legal covenants) where such migrations will deliver balanced and sustainable communities.
- 18.8. We may wish to apply restrictions to conversions of tenancies to Affordable Rent where deemed appropriate based on locally identified need and circumstances. Where Registered Providers have committed themselves to a proportion of vacancies being subject to conversion, they should discuss with the relevant Local Housing Authority those instances and locations where conversions may be deemed appropriate and those instances and locations where the Authority may wish to preserve an element of social rent provision.
- 18.9. We will support Affordable Rent provided as affordable housing *in addition* to those required under agreed s106 at nil public subsidy beyond the individual Council's approved affordable housing planning policy requirement.
- 18.10. We will also support Affordable Rent provided as part of the Registered Providers contract with the HCA (e.g. on 100% affordable sites) or by negotiation subject to viability.
- 18.11. We will support disposals to the open market subject to the agreement of the social housing regulator (currently the TSA), where the provider has completed an options appraisal and can demonstrate a clear benefit. Where Registered Providers have committed themselves to a designated number of disposals, they should discuss with the relevant Local Housing Authority those instances and locations where disposals may be deemed appropriate
- 18.12. Any affordable housing delivered with or without public subsidy must be compliant with HCA quality and design standards 2007 or any other subsequent standards introduced. This requirement may be reduced but only exceptionally where there is a clear and case specific justification.
- 18.13. Where specified in individual agreements, affordable housing delivered must remain at an affordable price for future eligible households or, if restrictions are lifted, the appropriate Housing Authority should be consulted and all effort should be made to

ensure that the resulting funds realised should be recycled for alternative affordable housing provision in that District area in the first instance.

- 18.14. In order to create and maintain stable, mixed and balanced communities, we shall encourage Registered Providers to provide tenancies for a minimum period appropriate to the needs of the household, the dwelling type and the specific location. To allow for flexibility any reduction from appropriate minimum period should be discussed with the Somerset Housing Partners in advance of any decision being made

(NOTE Minimum periods to be considered as part of the tenancy strategy by the project team. Our expectation is that a blanket number of years will not work for all client groups and that different minimums shall be set on a county-wide basis for different categories)

- 18.15. Somerset Housing Partners would support Affordable Rents of up to 80% (including service charges) as long as the actual rent charged is below the housing benefit cap to ensure clients who are eligible for housing benefit will be able to claim the full rental amount and to remain affordable after the move to universal credit.
- 18.16. All Affordable Rent properties should be advertised through the Somerset Choice Based Lettings scheme.

Consultation Draft

2. Shelter Private Rent Watch - Report one: Analysis of local rent levels and affordability October 2011

http://england.shelter.org.uk/_data/assets/pdf_file/0008/386828/Private_Rent_Watch_Report_1.pdf

See in particular Figure 6 and Figure 8, Figure 25 and 26 on affordability levels in the South West. Appendix 1 also provides information on average private rent levels.

3. Analysis of Social Rents on the Homefinder Somerset CBL scheme Average Rents by LA by Property and Bed Size

Local Authority	HFS Average	Highest		Lowest		
		Mendip	Sedgemoor	South Somerset	Taunton Deane	West Somerset
Bungalow						
1 Bedroom	68.10	67.05	56.75	77.47	60.28	79.90
2 Bedroom	80.11	76.01	64.94	83.16	71.55	86.87
Studio	51.06		51.06			
Flat						
1 Bedroom	62.29	55.10	54.93	66.72	60.75	70.88
2 Bedroom	74.06	70.81	74.72	75.44	71.84	79.23
3 Bedroom	62.87	83.87	61.56			
Studio	58.33	93.12	44.38	63.61		
House						
1 Bedroom	67.13	63.37	57.16	72.75		74.51
2 Bedroom	75.85	81.00	74.91	76.18	70.65	84.36
3 Bedroom	85.08	90.95	78.83	86.18	83.21	91.06
4 Bedroom	93.04	101.51	79.99	105.28	103.29	104.90
5 Bedroom	86.15		72.90		79.99	118.81
6 Bedroom	129.05			129.05		
Maisonette						
2 Bedroom	65.08	62.17	61.60	74.75	62.60	76.76
3 Bedroom	67.91	77.42	64.85	82.45	64.25	
Studio flat						
1 Bedroom	50.94				50.94	
Studio	52.14	27.33	50.38	60.28	55.09	63.47

Source: Analysis of property adverts from 1/4/10 to 31/3/11

5. EDF Energy Proposed Development at Hinkley Point – Additional Information

- a) EDF Energy has submitted a development consent order application to the Infrastructure Planning Commission for the construction and operation of two nuclear generating units at Hinkley Point power station (HPC), together with Allied Works within and off the site. The site of the proposed new reactors is within West Somerset; much of the associated, ancillary and other related development required to construct and operate the facility would be located in Sedgemoor. The issue of the accommodation requirements for the construction of HPC is a particular concern for the relevant local authorities.
- b) EDF Energy's workforce assumptions regarding the scale of temporary workforce are that the lifetime of the project is likely to require some **26,600 FTE** and a peak of **5600 FTE** on site by 2016. Of this number it is agreed that an estimated 34% could be home-based leaving 66% (approximately 3700 workers) requiring accommodation in the local area.
- c) The Councils are particularly concerned about the potential of significantly increased demand for accommodation in an area of high demand for affordable housing and limited capacity. A major influx of nearly 4000 construction workers seeking accommodation for a temporary period is likely to have a significant impact on the local accommodation market. These impacts may relate to the level of supply in relation to demand but also can be related to the price of accommodation. Where the supply and availability of housing is constrained as a consequence of construction worker demand, this will result in competition in the local housing market with other users of accommodation. Given the higher than local average wages of construction workers this is likely to have inflationary impact on rents and as a consequence will lead to (1) local people unable to access local housing and (2) the displacement of existing residents from accommodation.

6. Analysis of Homefinder Somerset Housing Register & CBL Data

6a Overall Household numbers as at 30.6.11

As a percentage of the total for each authority

Household numbers	1	2	3	4	5	6	7	8	9	10	13	Grand Total
Mendip District Council	41.96	26.01	14.58	10.24	4.58	1.82	0.63	0.13	0.05	0.00	0.00	100.00
Sedgemoor District Council	34.98	29.18	17.48	10.17	4.78	2.35	0.60	0.30	0.16	0.00	0.00	100.00
South Somerset District Council	39.56	28.37	15.38	9.36	4.30	2.01	0.70	0.18	0.10	0.02	0.02	100.00
Taunton Deane Borough Council	43.16	26.55	15.21	8.57	3.97	1.56	0.51	0.37	0.06	0.04	0.00	100.00
West Somerset Council	39.65	27.46	15.33	9.90	4.25	2.09	1.11	0.07	0.07	0.07	0.00	100.00
Grand Total	39.75	27.65	15.69	9.56	4.38	1.96	0.65	0.24	0.09	0.02	0.00	100.00

6b Banding and Household Numbers by Local Authority as at 30.6.11

Shown as a %age of total Household Number	Emergency		Emergency Total	Gold										Gold Total	
	1	3		1	2	3	4	5	6	7	8	9	10		13
Mendip District Council	0.03	0.03	0.05	3.47	1.53	0.76	0.32	0.24	0.13	0.24	0.00	0.05	0.00	0.00	6.74
Sedgemoor District Council	0.00	0.00	0.00	1.97	1.59	0.56	0.24	0.18	0.16	0.08	0.08	0.04	0.00	0.00	4.90
South Somerset District Council	0.00	0.00	0.00	3.48	2.45	1.20	0.60	0.13	0.15	0.15	0.13	0.08	0.02	0.02	8.41
Taunton Deane Borough Council	0.00	0.00	0.00	3.19	1.60	0.84	0.31	0.18	0.18	0.06	0.10	0.00	0.04	0.00	6.51
West Somerset Council	0.14	0.00	0.14	3.00	1.46	0.49	0.98	0.14	0.35	0.21	0.07	0.07	0.00	0.00	6.76
Grand Total	0.01	0.00	0.02	3.02	1.82	0.84	0.42	0.18	0.17	0.13	0.09	0.05	0.01	0.00	6.73

Shown as a %age of total Household Number	Silver									Silver Total
	1	2	3	4	5	6	7	8	9	
Mendip District Council	24.53	13.06	7.29	4.58	2.63	0.79	0.32	0.11	0.00	53.30
Sedgemoor District Council	18.84	12.94	7.32	3.27	2.29	1.14	0.42	0.16	0.10	46.50
South Somerset District Council	20.65	13.22	6.49	3.53	2.18	1.25	0.42	0.02	0.02	47.77
Taunton Deane Borough Council	23.72	11.02	6.58	3.23	1.77	0.66	0.35	0.23	0.04	47.58
West Somerset Council	16.66	10.73	5.51	3.28	2.37	1.11	0.63	0.00	0.00	40.28
Grand Total	21.36	12.45	6.79	3.57	2.20	1.00	0.40	0.11	0.04	47.91

Shown as a %age of total Household Number	Bronze										Bronze Total	Grand Total
	1	2	3	4	5	6	7	8	9	10		
Mendip District Council	13.92	11.42	6.50	5.34	1.71	0.89	0.08	0.03	0.00	0.00	39.91	100.00
Sedgemoor District Council	14.17	14.65	9.59	6.66	2.31	1.04	0.10	0.06	0.02	0.00	48.61	100.00
South Somerset District Council	15.43	12.70	7.69	5.23	1.98	0.62	0.13	0.03	0.00	0.00	43.82	100.00
Taunton Deane Borough Council	16.26	13.93	7.79	5.03	2.01	0.72	0.10	0.04	0.02	0.00	45.91	100.00
West Somerset Council	19.86	15.26	9.34	5.64	1.74	0.63	0.28	0.00	0.00	0.07	52.82	100.00
Grand Total	15.35	13.39	8.06	5.57	2.00	0.79	0.12	0.04	0.01	0.00	45.34	100.00

6c Adverts By Landlord and bedroom number (Numbers) 2010-11

	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	5 Bedroom	6 Bedroom	Studio	Total
Falcon Rural Housing Association	3	8	2					13
Flourish Homes	167	142	49	4			2	364
Guinness Hermitage	3	1						4
Hastoe HA	2	64	46					112
Homes in Sedgemoor	207	106	94	20	2		53	482
Jephson HA	5	26	13	3				47
Kennet Housing Society	5	1	2					8
Kilmersdon Rural Housing Association	3	2	1					6
Knightstone HA	54	70	41	7			11	183
Magna (West Somerset)	59	128	27	4	1		1	220
Magna HA Ltd	7	27	10	2				46
Places For People	6	11						17
Raglan HA Ltd	64	213	67	7				351
Redland HA		1	1	1				3
Sanctuary HA	29	131	5				2	167
Selwood Housing		1						1
SHAL	12	24	21	2				59
Signpost HA	31	19	9					59
Somer Community Housing Trust	1	1	1					3
Southwestern Housing Society		11	4					15
Sovereign HA	7	22	18	2				49
Taunton Deane Borough Council	173	163	54	3	1			394
The Alexander Every`s Almshouses Charitable Trust		1						1
Western Challenge HA	6	6	4					16
William Sutton Homes		2						2
Wyvern Rural Housing Association		1						1
Yarlington Housing Group	525	502	331	6			9	1385
Grand Total	1369	1684	800	61	4	9	81	4008

6d Adverts By Landlord and bedroom number (Percentage) 2010-11

	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	5 Bedroom	6 Bedroom	Studio	Total
Falcon Rural Housing Association	0.07	0.20	0.05	0.00	0.00	0.00	0.00	0.32
Flourish Homes	4.17	3.54	1.22	0.10	0.00	0.00	0.05	9.08
Guinness Hermitage	0.07	0.02	0.00	0.00	0.00	0.00	0.00	0.10
Hastoe HA	0.05	1.60	1.15	0.00	0.00	0.00	0.00	2.79
Homes in Sedgemoor	5.16	2.64	2.35	0.50	0.05	0.00	1.32	12.03
Jephson HA	0.12	0.65	0.32	0.07	0.00	0.00	0.00	1.17
Kennet Housing Society	0.12	0.02	0.05	0.00	0.00	0.00	0.00	0.20
Kilmersdon Rural Housing Association	0.07	0.05	0.02	0.00	0.00	0.00	0.00	0.15
Knightstone HA	1.35	1.75	1.02	0.17	0.00	0.00	0.27	4.57
Magna (West Somerset)	1.47	3.19	0.67	0.10	0.02	0.00	0.02	5.49
Magna HA Ltd	0.17	0.67	0.25	0.05	0.00	0.00	0.00	1.15
Places For People	0.15	0.27	0.00	0.00	0.00	0.00	0.00	0.42
Raglan HA Ltd	1.60	5.31	1.67	0.17	0.00	0.00	0.00	8.76
Redland HA	0.00	0.02	0.02	0.02	0.00	0.00	0.00	0.07
Sanctuary HA	0.72	3.27	0.12	0.00	0.00	0.00	0.05	4.17
Selwood Housing	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
SHAL	0.30	0.60	0.52	0.05	0.00	0.00	0.00	1.47
Signpost HA	0.77	0.47	0.22	0.00	0.00	0.00	0.00	1.47
Somer Community Housing Trust	0.02	0.02	0.02	0.00	0.00	0.00	0.00	0.07
Southwestern Housing Society	0.00	0.27	0.10	0.00	0.00	0.00	0.00	0.37
Sovereign HA	0.17	0.55	0.45	0.05	0.00	0.00	0.00	1.22
Taunton Deane Borough Council	4.32	4.07	1.35	0.07	0.02	0.00	0.00	9.83
The Alexander Every's Almshouses Charitable Trust	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Western Challenge HA	0.15	0.15	0.10	0.00	0.00	0.00	0.00	0.40
William Sutton Homes	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
Wyvern Rural Housing Association	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Yarlington Housing Group	13.10	12.52	8.26	0.15	0.00	0.22	0.30	34.56
Grand Total	34.16	42.02	19.96	1.52	0.10	0.22	2.02	100.00

6e Adverts By Local Authority and bedroom number (Numbers) 2010-11

	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	5 Bedroom	6 Bedroom	Studio	Total
Mendip District Council	207	203	73	3			2	491
Sedgemoor District Council	260	416	165	28	2		53	924
South Somerset District Council	596	688	426	13		9	14	1746
Taunton Deane Borough Council	254	304	108	13	1		11	691
West Somerset Council	52	73	28	4	1		1	159
Grand Total	1369	1684	800	61	4	9	81	4008

6f Adverts By Local Authority and bedroom number (Percentage) 2010-11

	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	5 Bedroom	6 Bedroom	Studio	Total
Mendip District Council	5.16	5.06	1.82	0.07	0.00	0.00	0.05	12.25
Sedgemoor District Council	6.49	10.38	4.12	0.70	0.05	0.00	1.32	23.05
South Somerset District Council	14.87	17.17	10.63	0.32	0.00	0.22	0.35	43.56
Taunton Deane Borough Council	6.34	7.58	2.69	0.32	0.02	0.00	0.27	17.24
West Somerset Council	1.30	1.82	0.70	0.10	0.02	0.00	0.02	3.97
Grand Total	34.16	42.02	19.96	1.52	0.10	0.22	2.02	100.00

Appendix 3 – Interim Tenancy Strategy Action Plan

Action	To complete by	Resource	Output
LA's to carry out feasibility study for use of Housing Options Wizard Add in detail here re housed stuff and move above change dates	May 2012	AH – via Op Group, HMG and Monitoring Board	This will provide a clear specification of the work required to implement the housing options wizard including costs and inputs from all partners.
Develop a comprehensive end of tenancy appraisal mechanism and principles. Waiting for Regulations, some social landlords have already developed a Framework; Tenants need to know offer, will be in Tenancy Policy. General Principles/Framework Interaction between Social Landlords and Housing Options Teams	Dec 2012	LAs to draft in consultation with landlords – use information from this document	End of tenancy checklist for social landlords Clear guidance/principles on what should and shouldn't be taken into account at end of tenancy review The circumstances that social landlords should have regard to in terms of vulnerabilities when undertaking tenancy reviews
Development of mechanism for provision of standard housing options advice at the end of the tenancy.	Dec 2012	HMG?	The implementation of the Housing Options wizard
Completion of Equalities Analysis on Interim Tenancy Strategy	Feb 2012	Core Group	An understanding of the impact of the policy on all stakeholders affected by the policy.
Social Landlords to undertake a consultation exercise with their tenants on their Tenancy Policy and appeals process.	Ongoing By April 2012	Social Landlords	Tenancy Policy and Appeals process that include tenant feedback
LA's to publicise all partner Social Landlords Tenancy Policies via Homefinder Somerset	April 2012	AH	Tenant and applicant awareness of social landlord stance on affordable rent and fixed term tenure
LA's to update housing advice teams on Interim Tenancy Strategy. LA's to ensure briefing note is fully understood by staff	Jan 2012	HMG/RP frontline staff	Staff awareness of changes to tenure and rental types and impacts on applicants and tenants.
LAs to update on tenancy policies	April 2012	HMG/RP frontline staff	Staff awareness of landlord tenancy policies to better advise applicants.
LA's to create standard procedures for housing advice teams	Dec 2012	As above	Consistency of approach when dealing with applicants/tenants affected by tenure/rent type changes.

Taunton Deane Borough Council

Tenant Services Management Board – 20 February 2012

Annual Report to Tenants 2010/11 Feedback Results

Report of the Tenant Services Development Officer

(This matter is the responsibility of Executive Councillor Jean Adkins)

1. Executive Summary

<p>This report aims to inform the Tenant Services Management Board of the feedback received on the Annual Report to Tenants 2010/11.</p>
--

2. Background

Feedback forms were provided to all tenants with the Annual Report to Tenants Calendar. We received a good response rate with 600 feedback forms being returned by the 31st January 2012.

3. Feedback Results

The feedback provided was largely positive and in favour of the new calendar format with 88% of tenants finding the calendar format useful and 85% of tenants wishing to see the next annual report in calendar format. The results of the feedback are provided in appendix 1 with additional comments below.

- *Q4 – Did you find any section of the annual report of particular interest?*

Tenants found the following sections of particular interest:

- Homefinder Somerset
 - Repairs & Maintenance Facts & Figures
 - Anti- Social Behaviour
 - Disabled Facilities Grants
 - Estate Walkabouts
 - The useful contact details – telephone numbers & meeting dates
 - Tenant Involvement
 - Local Offers
-
- *Q5 – Is there a particular section of the annual report that you did not find of interest?*

There was not a section of the annual report that tenants reported as consistently not being of interest.

- Q6 – *Is there anything you would like to see included in a future annual report?*

Tenants would like to see the following added to future annual reports:

- Dates of planned maintenance and upgrade programmes
 - Recycling/Rubbish collection dates when affected by bank holidays
 - Right to Buy figures
 - Crime statistics for Taunton Deane
-
- Q7 – *Would you like to be involved in future housing consultation events?*
 - Q9 – *Would you like to take part in next year's production of the annual report to tenants?*

The percentage of tenants who would like to be involved in future housing consultation events at 16% or in the production of the next annual report to tenants at 13% appears low but in fact equates to:

- 98 people wanting to be involved in future housing consultation events
 - 77 people wanting to be involved in the production of the next annual report to tenants.
-
- Q8 – *Are you happy with the methods currently used by the Council to communicate with tenants?*

84% of tenants are happy with the methods used by the Council to communicate with tenants.

4. Feedback Next Steps

A record of tenants who wish to be involved in Housing Services in the future is being kept and those tenants will be invited to future consultation events and included in future surveys. The feedback from this year's annual report will also be used to improve the next annual report to tenants.

A winner for the £100 prize draw for returning feedback by the 31st January 2012 will be selected by Councillor Jean Adkins.

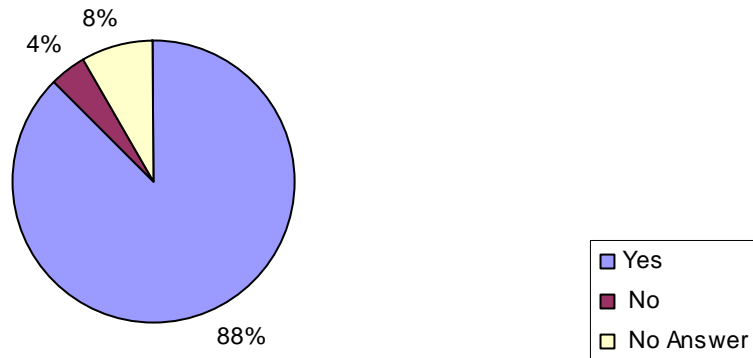
5. Recommendations

Tenant Services Management Board is asked to note the contents of the report and comment on the feedback received from tenants.

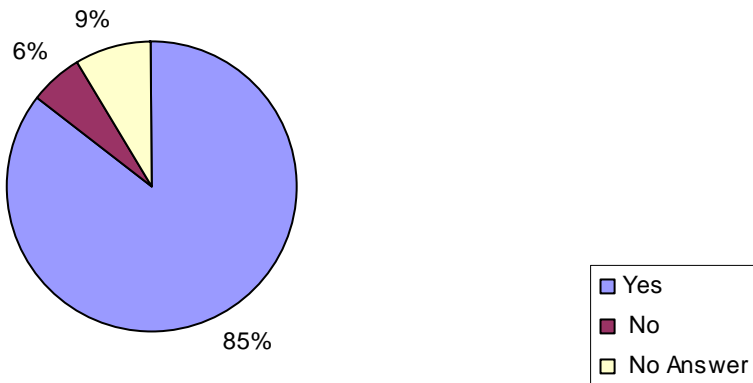
Contact: Officer Name Rosie Reed
 Direct Dial No 01823 356 327
 [e-mail](#) address r.reed@tauntondeane.gov.uk

Appendix 1 – Feedback Results

1. Did you find the annual report presented in calendar format useful?

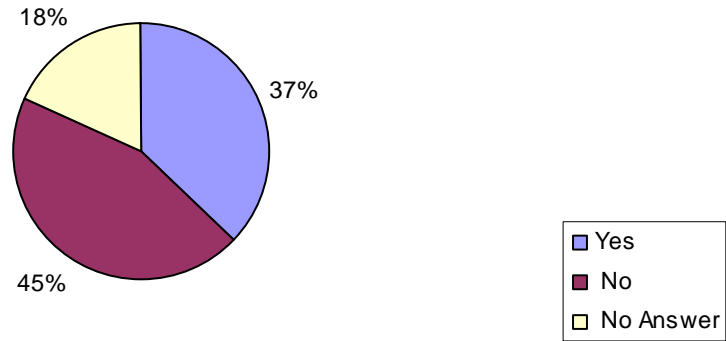


2. Would you like next year's annual report to be in a calendar format?

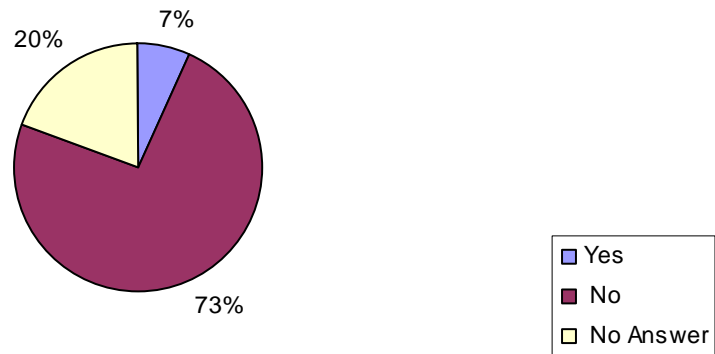


Q3. – What did you think about the annual report calendar to tenants?	No of Tenants
Too Long	12
About Right	350
Too Short	3
Too Much Information	14
About the Right Amount of Information	276
Not Enough Information	14
Very Well Presented	308
Fairly Well Presented	116
Not Well Presented	1
Very Easy to Understand	244
Fairly Easy to Understand	128
Difficult to Understand	8

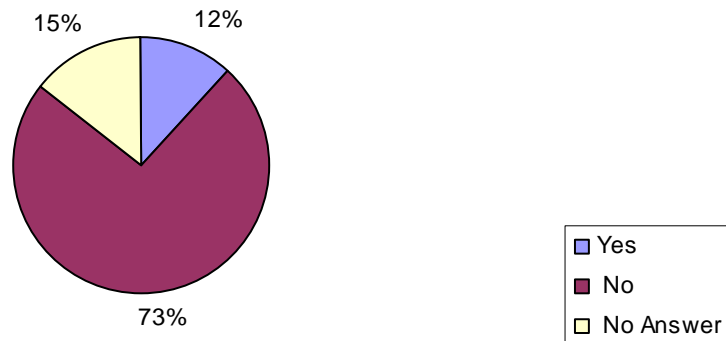
4. Did you find any section of the annual report of particular interest?



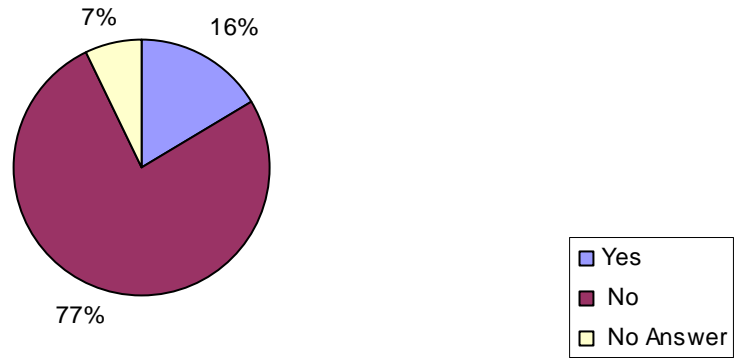
5. Is there a particular section of the annual report that you did not find of interest?



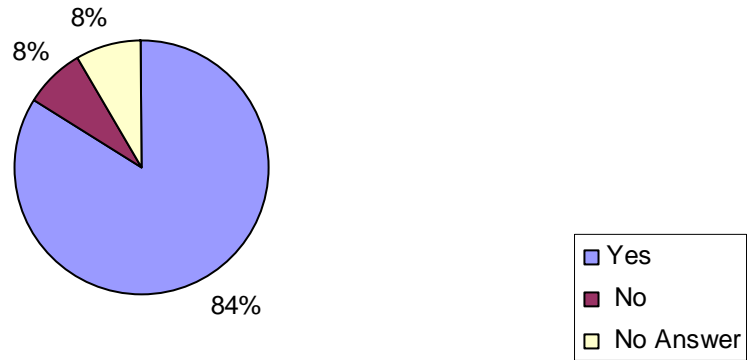
6. Is there anything you would like to see included in a future annual report?



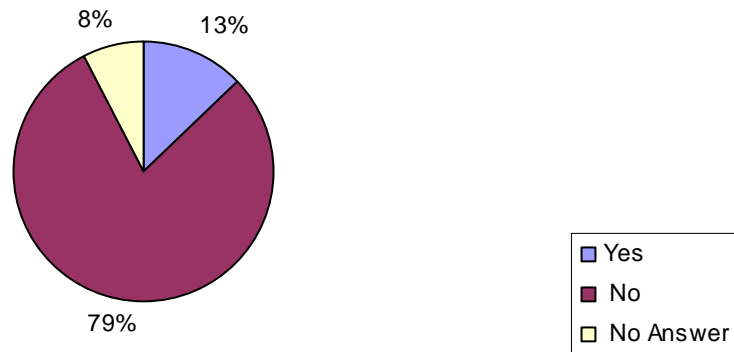
7. Would you like to be involved in future housing consultation events?



8. Are you happy with the methods currently used by the Council to communicate with tenants?



9. Would you like to take part in next year's Annual Report to Tenants?



Taunton Deane Borough Council

Tenant Services Management Board - 20th February 2012

Tenant Services Management Board Elections

Report of the Tenant Empowerment Manager

(This matter is the responsibility of Executive Councillor Jean Adkins)

1. Executive Summary

The Tenant Services Management Board (TSMB) was convened in April 2010 to represent the interests of all tenants of Taunton Deane Borough Council (TDBC) at strategic and policy levels, monitoring and reviewing strategic decisions and ensuring the best possible standards of housing service delivery to all council tenants. It assesses the housing service of Taunton Deane Borough Council (TDBC) and says where and how it can be improved.

When setting up the board it was suggested that board members serve for two years. This was subsequently set out in the board's Term of Reference (which were agreed by the board at its June 2010 meeting). The purpose of this report is to detail the election timetable and process.

2. Background

On the 11th August 2009 Taunton Deane Borough Council agreed to the creation of a Tenant Services Management Board of ten tenant representatives and two Councillors from April 2010.

In order to shape how the board should operate TDBC worked in conjunction with tenants culminating in a consultation event in November 2009. It was suggested that board members should serve two years, but with the opportunity to seek re-election. This was included in the Information Pack sent to all tenants in early 2010 and subsequently included in the board's Terms of Reference which was agreed by the TSMB at their June 2010 meeting.

As the two year period is now coming to an end it is prudent to review the application and election processes and ensure that the board is aware of the procedures that will be employed.

3. Process for applying to be a board member

Any tenants wishing to become a board member will nominate themselves for election. This is done by completing a short application form. This form consists of:

- Details of candidate (name, address, telephone numbers, date of birth)
- Date tenancy began or date partner or spouse of a tenant living at the same household
- Equality and Diversity Monitoring Form
- Election statement – no more than 100 words giving a small amount of background information such as:
 - why they want to be a board member
 - what they can bring to the board
 - any experience, knowledge, skills, qualities, abilities, positions held, membership of groups
 - any particular areas of interest they have in relation to housing services

All applicants are also asked to sign that they meet the Eligibility Criteria (please refer to Section 4 of this report)

All application forms are then checked and verified by TDBC officers to ensure that the Eligibility Criteria has been met. Those eligible will go forward for election. Applicants are then invited to have their photograph taken which will accompany the ballot papers.

4. Eligibility Criteria

Tenants are not eligible to be elected or serve on the Board if:

- they are not a tenant or partner or spouse of at least 5 year's standing of a tenant living at the same household
- they are under 18 years old
- they are in serious breach of their obligations as a tenant
- They become incapable due to a mental disorder
- They do not have a good rent payment and tenancy history
- They are a Councillor of Taunton Deane Borough Council
- They are a member of staff in Taunton Deane Borough Council's Housing service
- One of their family members is a current member of the Board

It should be noted that tenants can stand for election if they are already a member of the Tenants' Forum and/or a Tenants and Residents Association and Sheltered Housing Forum. Current members of the TSMB can also seek re-election.

5. Election Process

The election process is a postal vote to all TDBC tenants. It is important to note that this is each tenant, not based on each property. Therefore if there are joint tenants (Mr and Mrs X) in a property each will have a Ballot Pack and be able to vote. A ballot paper is sent out with:

- covering letter
- Candidate profile (photograph and election statement)
- Pre- paid envelope

Tenants would then vote for up to 10 candidates and return their ballot paper. The successful candidates are the 10 with the most votes, irrespective of where they live in the borough. Unsuccessful candidates will remain on a “reserve list”. If a board member position becomes vacant the seat will be offered to the candidate with the next highest number of votes

6. Election timetable

The timetable is currently awaiting confirmation. The draft key dates are detailed below:

- Information booklet detailing the importance of the TSMB and election process sent to all tenants at the start of March 2012
- Application forms to be returned by 28th March 2012
- Application forms checked for eligibility and candidates invited to have photograph taken
- Ballot papers designed and printed by 24th April 2012
- Ballot papers sent to all tenants by 27th April 2012
- Tenants have at least 2 weeks to vote and return ballot paper – i.e. 11th May 2012
- Votes counted and announcement of successful candidates by 16th May 2012
- New TSMB meets for first time on 22nd May 2012

7. Councillor Board Members

The two main Party groups (reflecting the political composition of the Council) nominate one member each to serve on the board. This can be any Councillor of the two main party groups except a member of the Executive.

8. Finance Comments

The cost of design, print, postage and counting the ballot papers can be paid from existing budgets.

9. Legal Comments

There are no specific legal comments.

10. Links to Corporate Aims

There are no specific links to corporate aims.

11. Environmental Implications

There are no specific environmental implications.

12. Community Safety Implications

There are no specific community safety implications.

13. Equalities Impact

It is important that tenants do not for any reason feel unable to put themselves forward as a TSMB member. If a tenant meets the eligibility criteria detailed in this report they will be able to receive any assistance necessary including:

- information translated into a different language
- documents in Braille
- documents in large print
- information on audio tape or CD

Members of the Tenant Empowerment Team will be accessible throughout the whole process to offer any advice and help required.

14. Risk Management

There are no specific risk management issues.

15. Partnership Implications

There are no specific partnership implications.

16. Recommendations

It is recommended the Tenant Services Management Board:

- Note this report

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Taunton Deane Borough Council

Tenant Services Management Board 20th February 2012

Tenants' Open Day

Report of the Tenant Empowerment Manager

(This matter is the responsibility of Executive Councillor Jean Adkins)

1. Executive Summary

A Tenants' Open Day is an event which typically runs all day (morning to evening, times to be agreed) and gives tenants an opportunity to gain information on and ask questions about topics that are of interest to them. The day is informal in terms of tenants can pop in at any time during the day; appointments do not have to be made.

The first such event was held in April 2011 and received a very positive feedback with over 100 tenants attending. This report examines arrangements for the 2012 event.

2. Background

The first Tenants' Open day was held at the Somerset County Cricket Ground on 18 April 2011. Over 100 tenants attended the event, with over 20 stalls available including various departments of Taunton Deane Borough Council and representatives from external organisations who were able to answer questions on a wide variety of housing related issues and other matters.

A questionnaire was circulated in order to seek the views of those attending the event. Results included:

- 40% of respondents rated the day as 'Excellent', 60% as 'Good'. No respondents considered the event to be 'just okay', 'poor' or 'very poor'.
- 87% of respondents agreed that there were enough departments available on the day

The Tenant Services Management Board (TSMB) was presented with a paper on feedback from the event at its meeting on the 17th May 2011. At this meeting the TSMB resolved that the Tenants' Open Day should be an annual event.

3. Tenants' Open Day 2012 - Venue

Last year it was agreed to hold the event on the same day as the TSMB Annual General Meeting. It was also agreed by tenants, councillors, staff and external organisations that the Somerset County Cricket Ground was a success as a venue, especially due to its central location and availability of parking spaces.

As the date of the TSMB AGM has been scheduled for the 23rd April 2012 the Tenant Empowerment Team has booked the County Room of the Somerset County Cricket Ground for the whole day on this date.

4. Tenants' Open Day 2012 - Timing

The 2011 event ran from 11am until 7pm. It should be noted that the amount of tenants attending the event reduced significantly after 5pm. TDBC also received feedback that some of the organisations left the event early and perhaps a shorter day would be more effective.

5. Tenants' Open Day 2012 – Invitations to be stallholders

By looking at the organisations that attended last year and examining the feedback forms a suggested list of organisations and TDBC departments has been drawn up:

Tenant Organisations

Tenant Services Management Board

Tenants' Forum

TDBC Housing Services

- Estate Management
- Leaseholder Section
- Property Services
- Tenant Empowerment Team
- Supported Housing
- Housing Options
- DLO

Other TDBC Sections

- Housing Benefits
- Deane Helpline
- Environmental Health
- Somerset West Private Sector Housing Partnership
- Community Development
- Housing Enabling

Non TDBC Organisations

- Citizens Advice Bureau
- Neighbourhood Care
- Centre for Sustainable Energy
- Avon and Somerset Police
- Age UK

- Job Centre
- SCAT

6. Tenants' Open Day 2012 - Publicity

Analysis of feedback from tenants shows that the most popular way of hearing about the 2011 event was by Invitation letter (93%) followed by promotion of the event from a Tenant Services Management Board Member (7%). No respondents indicated they heard about the event via a Housing Officer, the newspaper article or the poster displayed.

It is therefore the intention that each tenant will be sent an invitation to the event, detailing time, venue and stall holders. Even though other forms of publicity did not prove to be particularly popular it would not be time consuming or expensive to advertise the event in the Somerset County Gazette, on the TDBC website and by posters.

7. Tenants' Open Day 2012 – Leaseholders

As can be seen from Section 5 of this report TDBC will provide a separate stall to deal with leaseholder information and queries. Consideration will therefore have to be given to change the name of the event to "Tenants and Leaseholders Open Day". It will also be important to ensure all leaseholders are invited to the event.

8. Finance Comments

The cost of hiring the County Room is free up to 5pm, with a charge of £125 to keep the venue open until 7pm. There would also be a cost to provide lunch for stall holders (dependant on how many stall holders are at the event) and teas/coffees/water throughout the day.

The cost of sending invitation letters to each tenant would be approximately £1,800. This includes design work, printing and postage.

The cost of the event can be funded from existing budgets.

9. Legal Comments

There are no legal issues arising from this report.

10. Links to Corporate Aims

The event can contribute positively to the following council aims: Tackling Deprivation and Sustainable Community Development; Regeneration; and Affordable Housing and Climate change.

11. Environmental Implications

There are no environmental implications arising from this report.

12. Community Safety Implications

The event gives the opportunity for tenants to hear what TDBC does to tackle anti-social behaviour and be able to ask questions of the relevant officers

13. Equalities Impact

The County Room of the Somerset County Cricket Ground has been chosen as it has easy access for all.

The invitation letter will include a section that will allow tenants to have the information translated into a different language if necessary, in Braille, large print, audio tape or CD.

14. Risk Management

There are no risk management issues arising from this report.

15. Partnership Implications

The main aim of this event is to provide information to tenants that they will find interesting and worthwhile. It is therefore important to invite TDBC's partners to allow a wider amount of information.

16. Recommendations

It is recommended the Tenant Services Management Board:

- Note this report
- Review and comment on the organisations to invite to the event as detailed in Section 5
- Review and comment on the timing of event as detailed in Section 4
- Comment on the methods of publicity as detailed in Section 6
- Consider whether the event should be renamed "Tenants and Leaseholders Open Day" as noted in Section 7

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Taunton Deane Borough Council

Tenant Services Management Board 20th February 2012

Tenant Services Management Board Annual General Meeting

Report of the Tenant Empowerment Manager

(This matter is the responsibility of Executive Councillor Jean Adkins)

1. Executive Summary

The Terms of Reference of the Tenant Services Management Board (TSMB) state that the TSMB holds an Annual General Meeting (AGM) in April of each year or within 15 months of the previous AGM. This report highlights the proposed content and venue of the AGM.

It should be noted that the first AGM was held on the 18th April 2011.

2. Background

The Tenant Services Management Board held its first meeting in April 2010. One of its first tasks was to agree its Terms of Reference. Section 15 of this document states that:

“An Annual General Meeting will be held in April each year, or within 15 months of the previous AGM”

Last year the AGM of the TSMB formed part of the “Tenants’ Open Day” on the 18th April, with the formal meeting held at 5pm.

3. Date of the Annual General Meeting

It has already been agreed that the AGM will be held on the 23rd April 2012. This date has been publicised in the Annual Report to Tenants calendar that was sent out to all tenants in December 2011.

4. Publicity of the Annual General Meeting

As well as the date detailed in the Annual Report to Tenants calendar if the TSMB agrees to hold the AGM on the same date as the Tenants’ Open Day (as it did last year) information could form part of the invitation letter sent out to all tenants.

5. Content of the Annual General Meeting

There is no set format to the AGM. However, it is customary to include agenda items such as:

- reports from the outgoing Chairperson on the board's activities during the year
- reports on issues that face the TSMB and Housing Services in the coming year
- Consider and vote on any resolutions put forward by tenants

6. Venue of Annual General Meeting

The 2011 AGM was held at the Somerset County Cricket Ground as the Tenants' Open Day was taking place on the same day. A separate report on the Open Day is being presented to the TSMB at this meeting. As tenants, board members and staff are attending the Open Day it may be seen as logical to hold the AGM at the end of the Open Day.

7. Finance Comments

The main costs of the event would be the hire of the venue and publicity. However, if the TSMB agrees that the AGM will be held on the same day and at the same venue of the Tenants' Open Day the expenditure will be included in the cost of this event.

8. Legal Comments

There are no separate legal comments.

9. Links to Corporate Aims

There are no specific links to corporate aims.

10. Environmental Implications

There are no specific environmental implications.

11. Community Safety Implications

There are no specific community safety implications.

12. Equalities Impact

If the TSMB decides to hold the AGM in conjunction with the Tenants' Open Day the venue for the event, the County Room of the Somerset County Cricket Ground, has been chosen as it has easy access for all.

The invitation letter will include a section that will allow tenants to have the information translated into a different language if necessary, in Braille, large print, audio tape or CD.

13. Risk Management.

There are no risk management issues arising from this report.

14. Partnership Implications

There are no specific partnership implications.

15. Recommendations

It is recommended the Tenant Services Management Board:

- Receive and note this report;
- Consider the format and agenda items of the Annual General Meeting
- Consider the venue and timing for the Annual General Meeting
- Task Officers with planning and organising the Annual General Meeting and update the Tenant Services Management Board at their March meeting.

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