

# TAUNTON DEANE BOROUGH COUNCIL

## EXECUTIVE – 8<sup>th</sup> DECEMBER 2004

### Report of Head of Housing

(This matter is the responsibility of Councillor Garner)

### HOUSING STOCK OPTIONS

#### **Executive Summary**

The purpose of this report is to provide Members with an update on the work that has or is being undertaken and an overview of the progress being made on choosing a prospective new landlord; which has involved DOME the Independent Tenant Advisor (ITA).

#### **1. Background**

- 1.1 Members will recall that at July's Full Council, a decision was taken to investigate and ultimately ballot tenants on the option of a "Whole Stock Transfer Solution" to a Registered Social Landlord (RSL). Since that meeting a great deal of work has been undertaken with updates provided to Tenants, Members, Staff and our Partners. Attached for information as Appendix 1 is a Communication Log.
- 1.2 As throughout the Appraisal Process, the work undertaken has been monitored and a steer given by the Officer Working Group and the Steering Group, which have both met on average once a month.
- 1.3 After July's Full Council there were three key pieces of work required to be undertaken before embarking on a full-blown consultation exercise with tenants, which would ultimately lead up to a ballot. These are:
  - i) Obtaining "Sign Off" from the Government Office South West (GOSW) for the Stock Option Appraisal
  - ii) Choose a Prospective Landlord Type
  - iii) Apply to go on the Stock Transfer Programme
- 1.4 In regard to Point i), a formal application has been made to the GOSW to obtain "Sign Off" and it is hoped to hear shortly the outcome of that application. Initial feedback from GOSW is consistent with what officers have been previously advised of, that the work undertaken should be viewed as "Good Practice".
- 1.5 Points ii) and iii) will be addressed within the General section of this report.

## 2. General

### 2.1 *Choosing a Prospective Landlord*

#### 2.1.1 Guidance by the Office of the Deputy Prime Minister (ODPM) laid down in the 2005 Housing Transfer Programme states:

“An authority proposing a transfer is required to consider with tenants, in liaison with the Housing Corporation, what type of new landlord should take over the housing stock. The options are as follows:

- i) an existing RSL
- ii) a newly established subsidiary of an existent RSL (either as part of an existing group structure or through the creation of a new group structure)
- iii) a newly established free-standing RSL
- iv) a number of newly established RSL's that will make up a new group”.

#### 2.1.2 Historically there has been a presumption by local authorities that, in all except the smaller and partial transfers, the establishment of a new RSL as the new landlord is the best option. This can be the case but it should not be presumed that this will always be true. Where an authority is proposing to transfer stock to a new stand alone RSL, the ODPM will require the authority to demonstrate that it has worked with tenants to explore the scope for working with existing RSL's.

#### 2.1.3 The ODPM does not require a competitive process for landlord selection on all transfer proposals. However, the ODPM will require an authority to demonstrate clearly in both its Large Scale Voluntary Transfer (LSVT) Programme application and in working with the Community Housing Task Force (CHTF) that tenants have been made aware of all the new landlord options, what each option offers to tenants in relation to their particular circumstances and lastly but no means least, that they have been fully involved in deciding their eventual landlord choice. It is also believed to be beneficial to involve staff in this process and recently a questionnaire was sent to all staff to gauge their understanding of the work to date and to ask for their preferred choice of landlord. A similar exercise has also been undertaken with both our Partners and Members.

#### 2.1.4 The process of landlord selection will depend on a range of issues including:

- i) the size and nature of the stock to be transferred
- ii) organisational viability and the landlord's ability to deliver service improvements, manage the improvement programme, secure the confidence of the tenants and other stakeholders in the area, tenant empowerment and fundability
- iii) local circumstances such as community boundaries, geography and management areas, together with an understanding of the nature of the social housing market in which the authority is operating and of current choices of landlord available to tenants

- 2.1.5 All of what has been documented in the General section of this report is believed has or is being addressed, through the work of officers, DOME and PricewaterhouseCoopers (PWC).
- 2.1.6 Many of the areas that are required to be undertaken have been addressed through the work by DOME and attached to this report, as Appendix 2 is their report. Also attached as Appendix 3 are the statistics from the questionnaire undertaken by DOME. The only and arguably most important element that is missing and will be presented to Members verbally is the recommendation of the Insight Group on which landlord type they have chosen. This recommendation will be included in a updated report to be produced by DOME and will be re-presented to the Tenants Forum and Housing Review Panel on the 20<sup>th</sup> and 21<sup>st</sup> December respectively and January's Executive.
- 2.1.7 In regard to DOME's report it is believed important to put some perspective on the concerns that they have raised. The concerns raised in regard to tenants understanding are not uncommon at this stage of the process and as DOME have quite rightly recorded; this apparent lack of understanding should decrease as the process continues. Certainly the area of informing tenants about the process and countering disinformation will be a key part of the Project Team's remit when this dedicated team is formed in the new calendar year. It should also be remembered that when a second survey was undertaken to gauge tenants understanding at the end of the Appraisal process and comparison made to a similar exercise undertaken at the mid way point, an increase in awareness was recorded across all areas.
- 2.1.8 In response to their concern on losing momentum in early 2005 whilst various support consultants work is tendered, it should be remembered that this was something agreed with both the GOSW and CHTF. Both government bodies agreed and still do that this would be a good thing to undertake in order to enable the authority to take stock, recharge its batteries and enable staff to concentrate on their day job. This last element is vitally important as many housing services do record a dip in performance when undertaking a stock option appraisal and in the lead up to a ballot. Fortunately to date, this has not been the case with Taunton Deane due to the dedication and hard work of its housing staff.
- 2.1.9 In regard to DOME's last concern, I meet with the GOSW, CHTF and Housing Corporation on the 17<sup>th</sup> November to discuss the work being and still to be undertaken. All three government agencies are happy with the timescales that are being worked to and the nature of the work that has been or is planned to be undertaken.
- 2.1.10 On a related but different matter, during the evening of the 17<sup>th</sup> November both the GOSW and the CHTF clarified in a Special Executive Meeting that a "Fourth Option" did not exist and the Government had no intention of introducing a "Fourth Option".

## 2.2 *Application to go on the Stock Transfer Programme*

- 2.2.1 Key work that PWC are undertaking is in assisting officers to submit Taunton Deane's formal application to the ODPM to gain entry onto the Stock Transfer Programme. The application deadline is the 28<sup>th</sup> January 2005 and PWC are working with officers to ensure compliance is achieved in line with the ODPM guidance.

2.2.2 PWC will be presenting to the Tenants Forum and Housing Review Panel on the 20<sup>th</sup> and 21<sup>st</sup> December respectively and January's Executive the work they have undertaken. An element of this presentation will be on the financial differences between a Group Structure and a Stand Alone Stock Transfer, which is something PWC are scheduled to be discussing with the Insight Group on the 4<sup>th</sup> December. In addition to this, PWC will also update the Tenants Forum and Members on Taunton Deane's position in relation to Prudential Borrowing.

### 3. **Summary**

3.1 It is believed this report and the attached appendices provide Members with a good overview of the current position. A final report will be presented to January's Executive, when Members will be asked to select the type of landlord they would wish to manage the housing stock if tenants ultimately voted in favour of a transfer.

### 4. **Recommendation**

4.1 Members are asked to note and make comment on the contents of this report and appendices.

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OPTIONS APPRAISAL COMMUNICATIONS LOG

<b>ACTION</b>	<b>DATE</b>	<b>STAKEHOLDER DETAIL</b>	<b>FOLLOW-ON ACTION</b>	<b>OFFICER</b>	<b>LOGGED DATE &amp; INITIALS</b>
CHTF Stock Options & ITA advice	28.05.03	<b>Tenants Forum</b>	Training with TF and other LA's	Jayne Hares Sarah Johnston	JS 15.10.03
CHTF ITA recruitment training/advice	08.07.03	<b>Tenants Forum</b>		Jayne Hares Sarah Johnston	JS 15.10.03
Estate management team briefing	24.7.03	<b>Staff</b> briefing		Carl Brazier	AT 10.9.03
Repairs team briefing	25.7.03	<b>Staff</b> briefing		Carl Brazier	AT 10.9.03
ITA Recruitment training & discussion	1.08.03	<b>Tenants Forum</b>		Jayne Hares Iolanda Tocco	JS 15.10.03
Housing Review Panel Report	5.8.02	<b>Tenants Forum</b>		Penny James	JS 15.10.03
DLO team briefing	5.8.03	<b>Staff</b> briefing		Carl Brazier	AT 10.9.03
Full Council	6.08.03	<b>Members</b>		Carl Brazier	JM 22.08.03
Allocations team briefing	8.8.03	<b>Staff</b> briefing		Carl Brazier	AT 10.9.03
Core Brief to SMT	14.08.03	<b>Staff</b> - Summary of options appraisal explained in brief	All Managers to cascade through team meetings	David Woolnough	22.08.03 AT
Accountancy team briefing	17.8.03	<b>Support staff</b> briefing		David Woolnough	AT 18.9.03
Helpline Control centre team briefing	18.8.03	<b>Staff</b> briefing		Carl Brazier	AT 10.9.03
Interview skills training	19.8.03	<b>Tenants Forum</b>		Jayne Hares Richard Parsons	JS 15.10.03
Scheme managers' team briefing	27.8.03	<b>Staff</b> briefing		Carl Brazier	AT 10.9.03
Shortlisting for ITA	02.09.03	<b>Tenants Forum</b>		Jayne Hares	JS 15.10.03
Interviews for ITA	08.09.03	<b>Tenants Forum</b>		Jayne Hares	JS 15.10.03
LSP briefing	23.9.03	Briefing to strategic <b>partners</b>		Carl Brazier	AT 29.9.03
Individual briefing with Mark Beard (Supporting People)	24.9.03	<b>Partner</b> briefing		Carl Brazier	AT 29.9.03
Initial Meetings with Dome Consultants (ITA)	30.09.03	<b>Tenants Forum</b>		Jayne Hares	JS 15.10.03
Tenants Forum	08.10.03	<b>Tenants Forum</b>		Jayne Hares	JM 24.06.04
Housing Review Panel	08.10.03	<b>Members</b>		Carl Brazier	JM 25.03.04
Planning Meeting with DOME	13.10.03	<b>Tenants Forum</b>		Jayne Hares	JM 27.11.03

OPTIONS APPRASIAL COMMUNICATIONS LOG

Stock Options Appraisal Briefings to Housing Team	17-24.10.03	<b>Staff</b> briefing		Carl Brazier	JM 17.10.03
Website Going Live inc. Email Address	17.10.03	<b>All</b>		Alison Templeton	JM 21.10.03
Grapevine Message informing of Website	20.10.03	<b>Staff</b>		Alison Templeton	JM 21.10.03
Email to Directors and SUMS about website	20.10.03	<b>Partners and Members</b>		Alison Templeton	JM 21.10.03
Email to Directors and SUMS about Training	23.10.03	<b>Partners and Members</b>		Cathy Osborn of PWC	JM 23.10.03
Dome Monitoring	28.10.03	Tenants Forum		Jayne Hares	JM 10.11.03
Monitoring Meeting with DOME	28.10.03	<b>Tenants Forum and ITA Monitoring Group</b>		Jayne Hares	JM 27.11.03
Stock Options Packs Sent Out to Members	29.10.03	<b>Members</b>		Carl Brazier	JM 29.10.03
DOME Sheltered Housing Forum Meeting	30.10.03	<b>Sheltered Housing Forum Reps</b>		Jayne Hares	JM 10.11.03
Member Briefing Sheet	31.10.03	<b>Members</b>		Carl Brazier	JM 19.04.04
Deane Housing News	1/2.11.03	<b>Tenants and Leaseholders</b>		Jayne Hares	JM 10.11.03
TACT@DOME Newsletter	3/4.11.03	<b>Tenants and Leaseholders</b>		Jayne Hares	JM 10.11.03
Planning Meeting with DOME	11.11.03	<b>Tenants Forum</b>		Jayne Hares	JM 27.11.03
Volce 24-7 Article	12.11.03	<b>Tenants 14-18 years old</b>		Kirsty Grinter	JM 12.11.03
Core Brief to SMT	14.11.03	<b>Staff</b> - Update of Stock Options	All Managers to cascade through team meetings	Nan Heal	JM 14.11.03
Healthy Working Place Briefing Note	14.11.03	<b>Staff</b>		Nan Heal	JM 14.11.03
Weekly Bulletin	17.11.03	<b>All</b>		Alison Templeton	JM 19.04.04
Roadshows - DOME	17/22.11.03	<b>Tenants and Leaseholders</b>		TACT@DOME	JM 14.11.03
Halcon TRA - DOME	18.11.03	<b>Halcon Residents</b>		Carl Brazier	JM 14.11.03
Leaflet Sent Out in Pay Slips	22.11.03	<b>Staff and Members</b>		Lisa Wyatt	JM 24.11.03
Press Release	24.11.03	<b>All</b>		Nan Heal	JM 19.04.04
CHTF/TPAS Options Appraisal Roadshow	25.11.03	<b>Tenants Forum (5 Members)</b>		Jayne Hares	JM 27.11.03
Briefings to Service Support Team and including Housing staff who did not attend housing briefings	25.11.03 04.12.03 05.12.03	<b>Staff Briefings</b>		Carl Brazier	JM 03.11.03
Member Training with PWC	27.11.03	<b>Members</b>		PWC	JM 26.03.04

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Deane Despatch Article	01.12.03	<b>All</b>		Carl Brazier	JM 19.04.04
Briefing To Community Initiatives Team	01.12.03	<b>Staff Briefing</b>		Carl Brazier	JM 29.10.03
Housing Stock Press Release	02.12.03	<b>General Public</b>		Nan Heal	JM 02.12.03
Link Newsletter	03.12.03	<b>Halcon Residents</b>		Kirsty Grinter	JM 14.11.03
Monitoring Meeting with TACT@DOME	09.12.03	<b>Tenants Forum</b>		Jayne Hares	JM 16.12.03
Housing Review Panel	09.12.03	<b>Members</b>		Carl Brazier	JM 25.03.04
Tenants Forum Meeting TACT@DOME and PWC	09.12.03	<b>Tenants Forum</b>		Jayne Hares	JM 16.12.03
Executive Meeting inc. briefing on Stock Options	10.12.03	<b>Members</b>		Carl Brazier	JM 26.03.04
Core Brief to SMT	11.12.03	<b>Staff</b>		Nan Heal	JM 11.12.03
Briefing to Environmental Health, Planning Management, Forward Planning and Recovery Team Leaders and Managers	11.12.03	<b>Staff Briefing</b>		Carl Brazier	JM 05.11.03
Briefing To Accountancy Team	12.12.03	<b>Staff Briefing</b>		Carl Brazier	JM 29.10.03
Communication Questionnaire	15.12.03	<b>Staff</b>		Lisa Wyatt	JM 05.01.04
Briefing To Personnel Team	16.12.03	<b>Staff Briefing</b>		Carl Brazier	JM 29.10.03
Briefing to Procurement Team	16.12.03	<b>Staff Briefing</b>		Carl Brazier	JM 17.12.03
Briefing to Benefits Team	17.12.03	<b>Staff Briefing</b>		Carl Brazier	JM 17.12.03
Stock Options Appraisal Release - Notification of Completion of Phase A	19.12.03	<b>All</b>		Carl Brazier	JM 19.12.03
Communication Questionnaire	22.12.03	<b>Members</b>		Lisa Wyatt	JM 05.01.04
Memo to all housing managers informing of next phase of briefings	22.12.03	<b>Housing Managers</b>	Cascade to all staff	Carl Brazier	JM 22.12.03
North Taunton News Article	09.01.04	<b>Tenants</b>		Carl Brazier	JM 19.04.04

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Deane Housing News	10.01.04	Tenants		Jayne Hares	JM 19.04.04
Update Briefing Sheet with TF newsletter	10.01.04	Tenants		Jayne Hares	JM 19.04.04
Insight Group Meeting (DOME)	13.01.04	Tenants		Jayne Hares	JM 17.12.03
Wellington East TRA Open Meeting	14.01.04	Members of WETRA		Carl Brazier	JM 15.01.04
TF Monitoring Group with TACT@DOME	19.01.04	Tenants' Forum		Jayne Hares	JM 15.01.04
Housing Services Partners Day	21.01.04	Presentation to Partners		Carl Brazier	JM 21.01.04
Next Phase Housing Briefings	27-31.01.04 01-06.02.04	Staff		Carl Brazier	JM 22.12.03
Housing Needs Insight Group Presentation by MJW (DOME)	31.01.04	Insight Group Tenants		Jayne Hares	JM 09.02.04
Member Questionnaire (2nd Attempt)	01.02.04	Members		Lisa Wyatt	JM 04.02.03
Weekly Bulletin	05.02.04	All		Claire Tough	JM 19.04.04
Member Briefing Sheet	09.02.04	Members		Carl Brazier	JM 19.04.04
Core Brief	09.02.04	Staff		Claire Tough	JM 19.04.04
Press Release	09.02.04	All		Nan Heal	JM 19.04.04
Insight Group Meeting - Stock Condition by JPS (DOME)	21.02.04	Insight Group Tenants		Jayne Hares	JM 26.03.04
Tenants Forum	24.02.04	Tenants Forum		Jayne Hares	JM 24.06.04
Housing Review Panel	25.02.04	Members		Carl Brazier	JM 25.03.04
Insight Group - Stock Condition & Service Delivery by JPS & JW (DOME)	06.03.04	Insight Group Tenants		Jayne Hares	JM 26.03.04
Member Questionnaire (3rd Attempt)	08.03.04	Members		Pete Weaver	JM 22.03.04
Insight Group - HRA Forecast by CO (DOME)	20.03.04	Insight Group Tenants		Jayne Hares	JM 26.03.04
Briefing with County/Parish Councillors	24.03.04	Stakeholders		Carl Brazier	JM 29.01.04
Dome Tenant Newsletter	29.03.04	Tenants		Jayne hares	JM 19.04.04
Insight Group - Criteria Setting (DOME)	03.04.04	Insight Group Tenants		Jayne Hares	JM 26.03.04



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Link Centre News Article	05.04.04	Tenants		Jayne Hares	JM 19.04.04
Tenants Forum	13.04.04	Tenants Forum		Jayne Hares	JM 24.06.04
Housing Review Panel	14.04.04	Members		Carl Brazier	JM 25.03.04
Informal Unison Meeting	14.04.04	Staff		Carl Brazier	JM 28.05.04
Next Phase Non Housing Brifings	7-16.04.04	Staff		Carl Brazier	JM 22.03.04
Insight Group - Decision Making - CB (DOME)	17.04.04	Insight Group Tenants		Jayne Hares	JM 26.03.04
Member Briefing	27.04.04	Members		Carl Brazier	JM 22.03.04
Sheltered Housing Forum Briefing - DOME	29.04.04	Tenants		Jayne Hares	JM 04.06.04
Presentation to SMT	13.05.04	Staff		Carl Brazier	JM 26.05.04
Core Brief	13.05.04	Staff		Carl Brazier	JM 28.05.04
Press Release (did not reach press)	14.05.04	Tenants		Carl Brazier	JM 28.05.04
Insight Group Decision Making - DOME	15.05.04	Tenants		Jayne Hares	JM 04.06.04
Press Release	24.05.04	All		DOME	JM 28.05.04
6 Information Briefings	27.05.04 to 2.06.04	Tenants		DOME	JM 28.05.04
Tenants Forum	01.06.04	Tenants Forum		Jayne Hares	JM 24.06.04
Housing Review Panel	02.06.04	Members		Carl Brazier	JM 25.03.04
Weekly Bulletin	04.06.04	All		Claire Tough	JM 19.04.04
2nd Phone Survey - MRUK	07.06.04	Tenants		Jayne Hares	JM 04.06.04
Presentation to North Deane Residents Association	08.06.04	Tenants		Carl Brazier	JM 08.06.04
Presentation to Lyngford and Wedlands Residents Association	09.06.04	Tenants		Carl Brazier	JM 08.06.04
Core Brief	31.06.04	Staff		Claire Tough	JM 19.04.04
Update Email	01.07.04	Staff		Lisa Wyatt	TM 19.07.04
Update Email	06.07.04	Members		Pete Weaver	TM 19.07.04
Tenants Forum	06.07.04	Tenants Forum		Jayne Hares	JM 24.06.04

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Housing Review Panel	06.07.04	<b>Members</b>		Carl Brazier	JM 25.03.04
Executive Meeting	13.07.04	<b>Members</b>		Carl Brazier	TM 19.07.04
Full Council	20.07.04	<b>Members</b>		Cllr Greg Garner	TM 20.07.04
Decision Letter	22.07.04	<b>All Tenants and Leaseholders</b>		Cllr Greg Garner	TM 28.07.04
Decision Letter	22.07.04	<b>Parish Councillors</b>		Cllr Greg Garner	TM 28.07.04
Decision Email	22.07.04	<b>All Staff</b>		Jeremy Thornberry	TM 28.07.04
Decision Letter	23.07.04	<b>Stakeholders</b>		Cllr Greg Garner	TM 28.07.04
Payslip Info letter	22.08.04	<b>All staff and Members</b>		Lisa Wyatt- Jones	TM 24.08.04
Update Email to staff and Landlord Choice	13.09.04	<b>All Staff</b>		Carl Brazier	TM 14.10.04
Staff Briefing Session	28.09.04	<b>All Staff</b>		Carl Brazier	TM 07.10.04
Drop-in Sessions	30.09.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 07.10.04
Drop-in Sessions	30.09.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 07.10.04
Drop-in Sessions	01.10.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 07.10.04
Drop-in Sessions	01.10.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 07.10.04
Drop-in Sessions	02.10.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 07.10.04
Tenants Forum	06.10.04	<b>Tenants</b>		Carl Brazier	TM 30.11.04
Housing Review Panel	06.10.04	<b>Members</b>		Carl Brazier	TM 30.11.04
Housing Staff Briefing	08.10.04	<b>All Housing Staff</b>		Carl Brazier	TM 16.11.04
Insight Group Meeting	09.10.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 07.10.04
Full Council	12.10.04	<b>Members</b>		Cllr Garner	TM 30.11.04
Housing Staff Briefing	15.10.04	<b>All Housing Staff</b>		Carl Brazier	TM 16.11.04
Insight Group Meeting	16.10.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 16.11.04
Housing Staff Briefing	19.10.04	<b>All Housing Staff</b>		Carl Brazier	TM 16.11.04
Housing Staff Briefing	22.10.04	<b>All Housing Staff</b>		Carl Brazier	TM 16.11.04
Insight Group Visit	2.11.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 30.11.04
Partners Event	05.11.04	<b>All Partners</b>		Carl Brazier	TM 16.11.04
Insight Group Visit	09.11.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 30.11.04
Insight Group Meeting	13.11.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 16.11.04
Special Executive	17.11.04	<b>All Members</b>		GOSW, CHTF Carl Brazier	TM 30.11.04

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Email to Staff	22.11.04	<b>All Staff</b>		Lisa Wyatt-Jones	TM 30.11.04
Memo to Members	22.11.04	<b>All Members</b>		Lisa Wyatt-Jones	TM 30.11.04
Insight Group Visit	26.11.04	<b>All Tenants and Leaseholders</b>		Jayne Hares	TM 30.11.04

## **REPORT OF ACTIVITIES IN RELATION TO SELECTION OF LANDLORD TYPE**

### **OBJECTIVE**

- 1 This report summarises the work undertaken by the Insight Group, and all tenants, during September, October and November to provide the Council with a recommendation on whether tenants would prefer a stand alone landlord or one which would be a member of a Group.
- 2 One further Insight Group meeting remains to be held (it has been delayed to allow a last visit by tenants to an example of a housing association that has transferred direct to a group). It is at this meeting that the Group will make a recommendation (if they choose to do so).
- 3 Throughout the period tenants have been supported by TACT@DOME, their Independent Tenants Adviser, whose contract was extended to allow the work to happen.
- 4 Throughout this period the local press and a local “Defend Council Housing” campaign have combined to raise the profile of the development of the transfer proposal. This has undoubtedly helped to make residents aware (see survey response rate below), and has resulted in a larger Insight Group attendance, but it has also led to many residents receiving inaccurate and misleading information about national housing policy.
- 5 Much of the ITA’s informal contact (e.g. 100 Freephone calls) has been spent in providing reassurance to worried and anxious tenants (especially older ones).

### **INITIAL CONTACT AND DROP INS**

- 6 All tenants were contacted by Newsletter, to advise them of the purpose of this stage of the consultation, and to invite them along to a series of five drop in sessions. These were held in locations in Taunton, Wellington and the rural areas at varying times of day, including a Saturday session in central Taunton. A total of 105 people attended.
- 7 While these sessions were aimed at providing residents with information about landlord type, in practice they were predominantly used by those who came to get information and to update on the Council’s decision to look at a transfer, and why this had been made.

<b>REPORT OF ACTIVITIES IN RELATION TO SELECTION OF LANDLORD TYPE</b>
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- 8 The vast majority of those who came were added to the Insight Group mailing list, which now totals 324. Attendance at Insight Group has increased – 40 at the last meeting – compared to an average attendance of 25 in the earlier consultation.

### **INSIGHT GROUP MEETINGS**

- 9 Initially it was intended to hold four Insight sessions. In the event, five have been necessary, plus an Introductory session for new joiners. In part this has been caused by the need to allow time to deal with a very few individuals whose main objective has been to prevent the debate taking place since they believe that Government is about to release new money to Councils for use in bringing their homes up to a Decent standard.
- 10 After pressure from the Group these individuals have either stopped coming, and those who are still attending seem to be less obstructive than previously.
- 11 Numbers attending have increased – there were 40 at the last meeting (this is double the number at the last meeting of the previous phase). The mailing list for meetings has also increased to 324 – up by over 100.
- 12 The Group has informed itself about the options, and worked through the pros and cons of the alternative arrangements. This has included a session with Steve Fox, the Housing Corporation official responsible for registering transfer landlords. Steve gave a very clear picture of the process, registration and regulatory requirements, and the Corporation's powers in relation to Observation and Supervision. The Group's final debate will be informed by the visits and the all tenant survey, as well as its own more detailed knowledge.

### **Concerns**

- 13 A number of concerns (other than the issues raised above) were expressed at the last Insight Group session. These will need to be used as learning points and addressed in the next phase of the consultation in order to build understanding of the issues and process:
- There is a degree of confusion “out there” about what is going on, and what stage the proposal is at. Press coverage has served to

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cause concern rather than to clarify. As the proposals are developed, and an increasing number of tenants are engaged in the process, this should decrease to the point where at least 70% feel well informed enough to vote.

- Tenants felt that the Council's communications strategy did not serve to counter the disinformation that has been published.
- Potential loss of momentum if there is a moratorium on activity in early 2005 while the various support consultants' work is tendered; and concern over the extended period allowed for consultation (The Corporation indicated a 6 – 9 month period).
- Concern about the selection process for an ITA – in part caused by the fact that some Forum members (who appointed TACT@DOME) had not attended the Insight Groups and so could not be aware of the work that had been done in the past three months. The Insight Group felt that it should have a role in deciding on the process, and the need to re-tender – it sees itself as taking the lead in the development of the transfer proposal, while the Forum maintains its wider role with the Council landlord. The roles and relationships between the Insight Group and Forum will need to be clarified in the next phase of the consultation.

### VISITS

- 14 Insight Group members visited three examples of different types of transfer within the South West, meeting tenants, Board members and staff. They prepared for their visits, agreeing the questions and areas of interest that they wanted to cover.
- 15 All the visits were to transfer landlords whose stock is considerably smaller than Taunton Deane's, and as such are more vulnerable. The Group identified that there are, in fact, four potential options, if there was a transfer:
  - Stand alone
  - Stand alone, with a view to keeping the option of joining a group under review
  - Transfer to a new landlord which would be part of a group
  - Transfer direct to an existing landlord
- 16 Tor Homes transferred as a stand alone and remained so for 5 years before joining the William Sutton Group, which operates across

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Southern England. The key issue the Group noted here was that because Tor had gained experience on its own it was able to place itself with the William Sutton Group as leading Group in the South West.

- 17 West Devon transferred as a stand alone (albeit a very small one). A key achievement for them was that they had developed sufficient homes to more than replace the numbers lost through the Right to Buy.
- 18 In neither case did tenants find concerns about delivering on the promises made at transfer. In both cases tenants they met said that they felt that, while nothing was perfect, on balance they were glad that their transfers had gone ahead.
- 19 The third visit is to Purbeck Homes, which transferred direct to East Dorset. A subsidiary report will be provided to record that visit.

### SURVEY

- 20 This part of the report sets out the results of the postal survey of all tenants, carried out in late October/early November 2004, seeking their views about the type of landlord – stand alone or group – that they would prefer, if they were offered a transfer proposal. All tenants were sent information sheets, and a questionnaire. The survey was carried out by TACT@DOME.
- 21 It is structured as follows:
  - Who responded
  - Results
  - Conclusions

### Who responded

- 22 Questionnaires were sent to all 6,503 tenants. 1,616 responded – 24.8%. This is a high response rate for a postal survey, and reflects the profile which the future of tenant's homes is acquiring in the TDBC area.
- 23 One hundred tenants used our Freephone service to clarify the current position, which has been very significantly confused by the mis-information that has been published locally in the past couple of months.

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- 24 52% of respondents were aged over 65, and 15% were aged between 56 and 65. Only 1% were under 25. The remainder were evenly spread between 25 and 56. 2% did not respond to this question. This is a fairly typical spread of responses, given the age profile of Council tenants generally.
- 25 The vast majority of respondents were white British (96%) and a further 2% were either white Irish or white – other. Less than 2% failed to respond to this question.
- 26 21% lived in sheltered accommodation, 42% in a family homes, 25% in a flat, and 3% were leaseholders. Compared to the age profile, this implies what we hear frequently on the Freephone – that there is under occupation in the stock. Callers voice concerns about this because they fear that a new landlord would be able to force them to move.

### **Opinions about stand alone or group – services and new homes**

#### Responsibilities for homes and services outside Taunton Deane area

- 27 A clear majority – 56% - see this as a “bad thing”. 16% say it doesn’t matter, 20% were uncertain, and 3% failed to respond. Only 6% see this as a “good thing”.

#### Headquarters outside Taunton Deane

- 28 69% say that this would matter to them. 10% were either unsure, or didn’t respond. 21% say it doesn’t matter to them.
- 29 Taken together these two sets of answers show a clear majority expressing a view; and a clear majority favouring a Taunton focus.

#### Development of new homes

- 30 53% want to see a new landlord that can develop new homes. 17% disagree that this is important, and the same percentage say it doesn’t matter. 13% failed to respond or were unsure.



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Service standards

- 31 12% say that, compared with the current service, a stand alone would do better, and 24% think that it would be the same. The respective returns for a Group are 6% and 14%. This means around a third think that services with a stand alone would be no worse than with the Council.
- 32 22% think that services would be worse with a stand alone; and 30% with a group.
- 33 32% said that they were unsure about this for a stand alone; and 39% were unsure about how a group would perform.
- 34 11% were unable to reply. This means that 42% were not in a position to take a view about a stand alone and services.

Preference between stand alone or group

- 35 38% favour a stand alone, but over half – 51% - said they needed more information (32%) or didn't reply (19%).

Concerns

- 36 The survey provided the opportunity for tenants to raise their concerns in their own words. 42% (660) of the respondents opted to do so - We have grouped these comments together into themes:

<b>Concerns</b>	<b>number of mentions</b>
Rights, tenancy, security	53
Rents and costs to tenants	139
Repairs and improvements	41
Representation	2
Services	24
Regeneration	4
Would like more information (but see above)	45
Critical of process	52
Would like to stay with TDBC	327

## REPORT OF ACTIVITIES IN RELATION TO SELECTION OF LANDLORD TYPE

### Involvement

- 37 Respondents were asked if they wanted more involvement with the transfer proposal or wanted to join a tenants' group. 94% said that they did not.

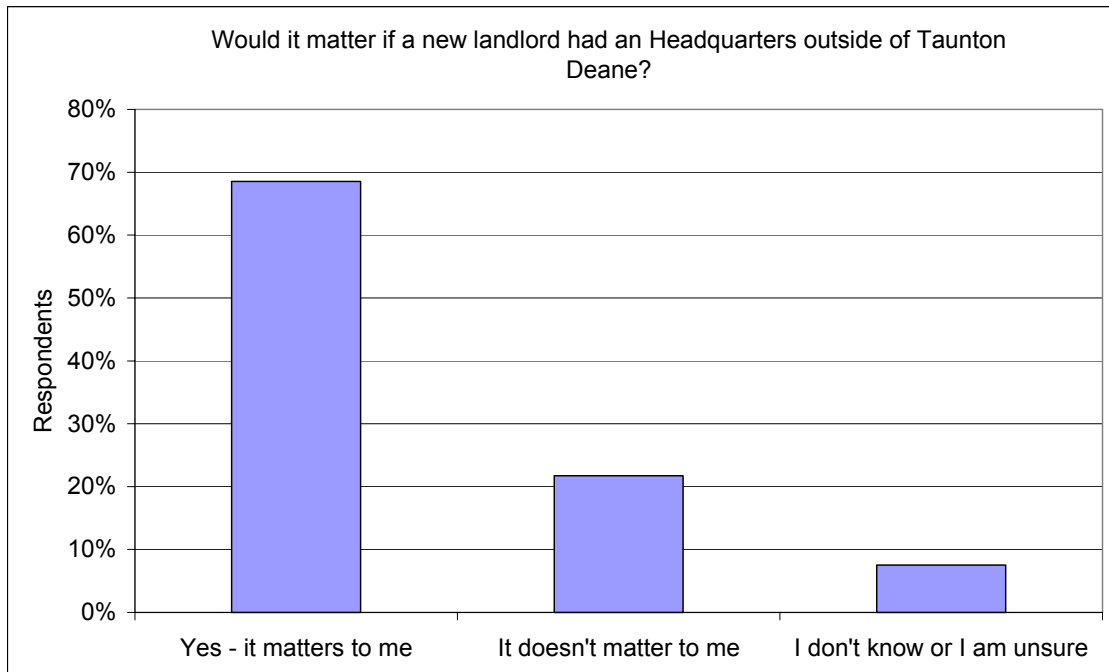
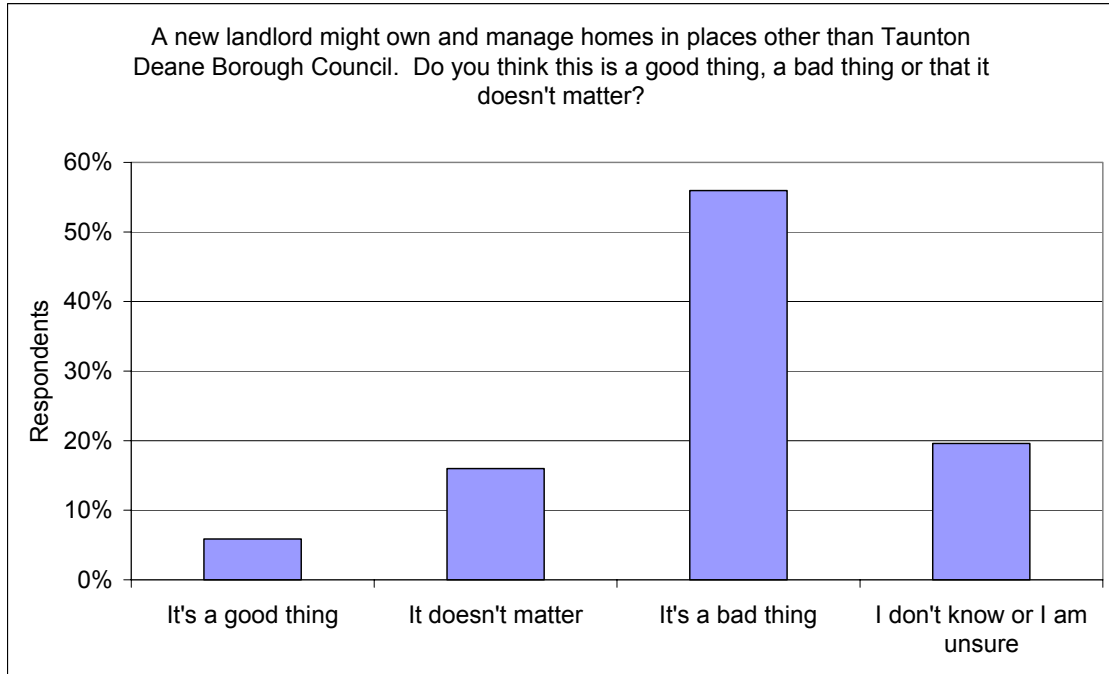
### **Conclusions**

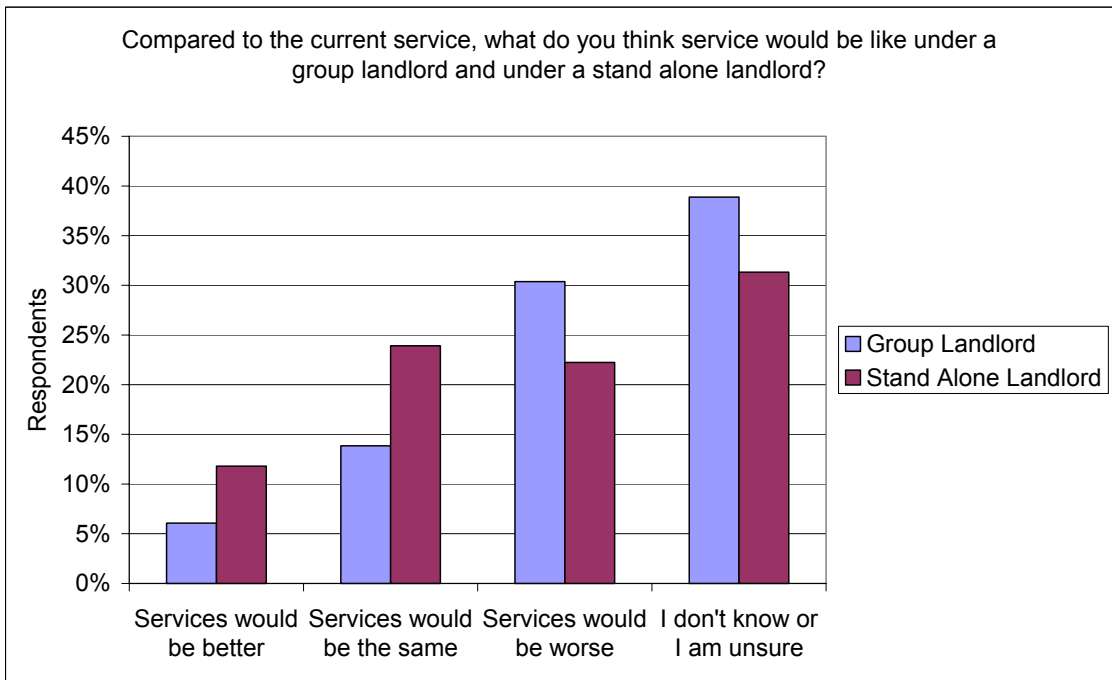
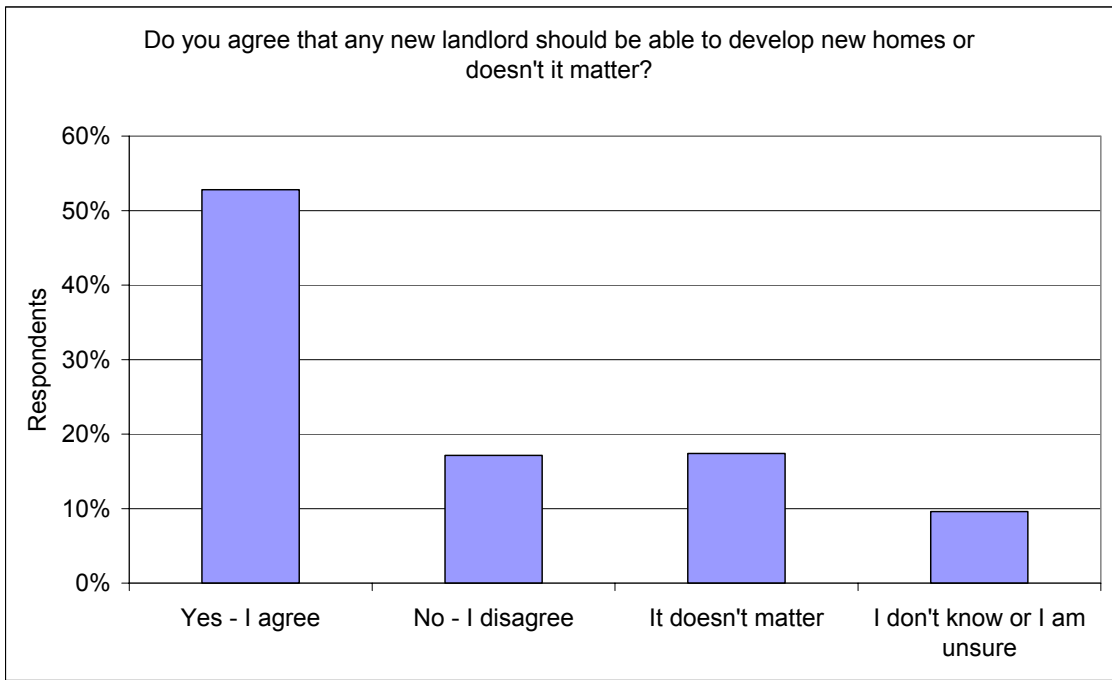
- 38 In terms of a transfer landlord, it is clear that tenants would prefer a stand alone. The hardening of replies about where the headquarters is emphasises this, because headquarters represents control, whereas being responsible for homes and services outside the area doesn't.
- 39 More than half see the provision of new homes by the transfer landlord as important. This underscores the profile of this issue in terms of the consultation. The linking of new homes to a new landlord as the provider, as opposed to linking a transfer to generate funding for the provision of new homes may well have had an influence on the replies.
- 40 It is not surprising that 42% were either unsure or unable to reply on the services questions for a stand alone (the figure was 50% for a group). This implies that the pre-ballot period needs to have a focus on services and standards.
- 41 Of the 49% who expressed a view, the stand alone is clearly favoured. (38% compared to 11% in favour of a group). Only 19% chose not to reply to this question, whereas 32% needed more information in order to take a view.
- 42 20% of the total of respondents specifically said, in the freeform section, that they wanted to stay with TDBC – very similar to the percentage who declined to express a view. From the comments, rents and costs are easily the biggest issue, followed by rights, repairs and services.
- 43 The final Insight Group will take these views into account in making its recommendation to the Council.

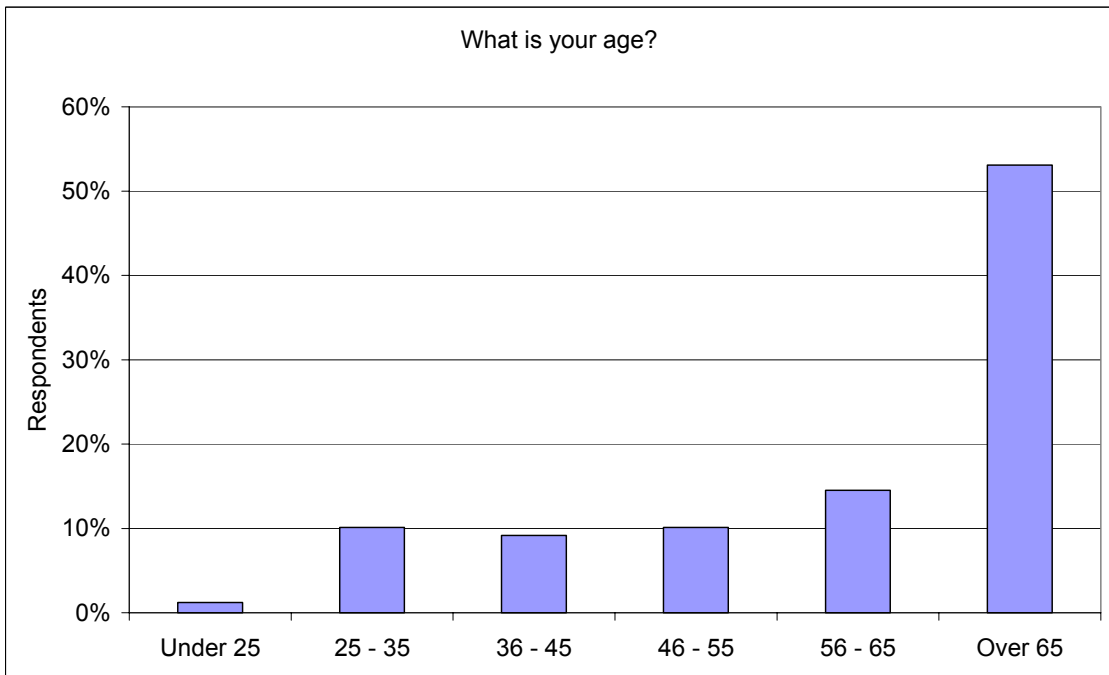
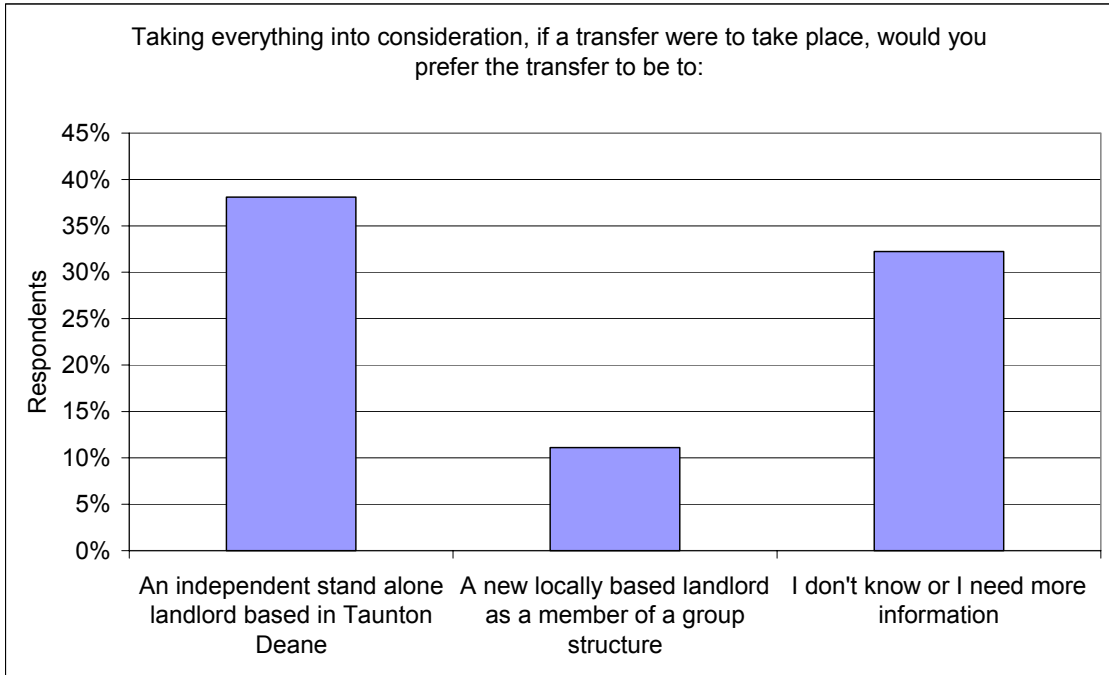
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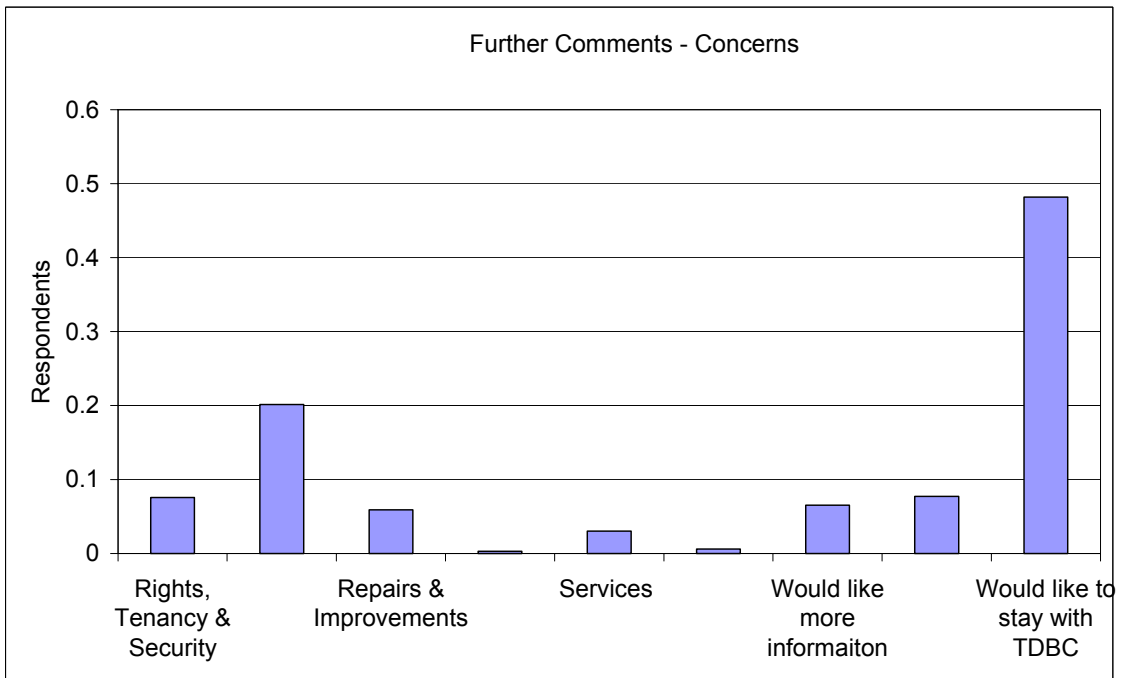
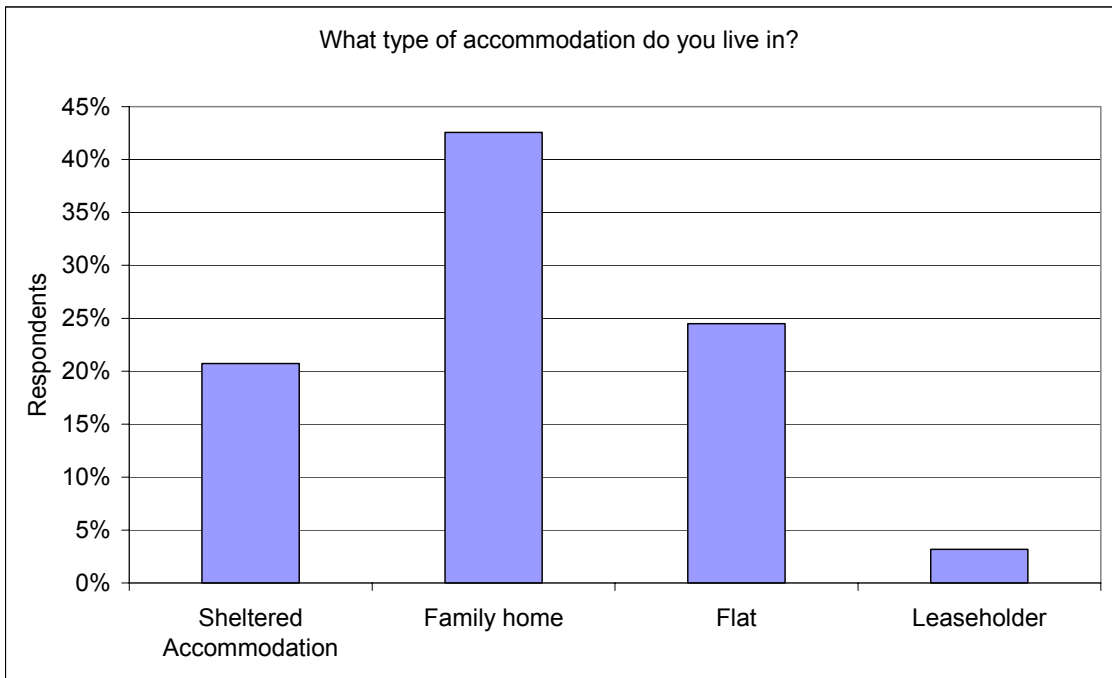
TACT@DOME

## Results of the Tenants Opinions Questionnaire









Would you like to get more involved with the transfer proposals or join a tenant group?

