

# Pecyn Dogfennau Cyhoeddus

Penallta House,  
Tredomen Park,  
Ystrad Mynach,  
Hengoed CF82 7PG

Ty Penallta,  
Parc Tredomen,  
Ystrad Mynach,  
Hengoed CF82 7PG



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Am bob ymholiad ynglŷn â'r agenda hwn cysylltwch â Charlotte Evans  
(Rhif Ffôn: 01443 864210 Ebst: [evansca1@caerphilly.gov.uk](mailto:evansca1@caerphilly.gov.uk))

**Dyddiad: Dydd Mercher, 5 Chwefror 2020**

Annwyl Syr/Fadam,

Bydd cyfarfod **Grŵp Tasg Tai Caerffili** yn cael ei gynnal yn **Ystafell Sirhywi, Tŷ Penallta, Tredomen, Ystrad Mynach** ar **Dydd Iau, 13eg Chwefror, 2020** am **5.00 pm**.i ystyried materion a gynhwysir yn yr agenda canlynol. Gall cynghorwyr a'r cyhoedd sy'n dymuno siarad am unrhyw eitem wneud hynny drwy wneud cais i'r Cadeirydd. Mae croeso i chi hefyd ddefnyddio'r Gymraeg yn y cyfarfod. Mae'r ddau gais hyn yn gofyn am gyfnod rhybudd o 3 diwrnod gwaith, a bydd cyfieithu ar y pryd yn cael ei ddarparu os gofynnir amdano.

Mae pob cyfarfod Pwyllgor yn agored i'r Wasg a'r Cyhoedd. Gofynnir i arsylwyr a chyfranogwyr ymddwyn gyda pharch ac ystyriaeth at eraill. Sylwer y bydd methu â gwneud hynny yn golygu y gofynnir i chi adael y cyfarfodydd ac efallai y cewch eich hebrwng o'r safle.

Yr eiddoch yn gywir,

**Christina Harrhy**  
PRIF WEITHREDWR DROS DRO

## A G E N D A

Tudalennau

1 I dderbyn ymddiheuriadau am absenoldeb

2 Datganiadau o Ddiddordeb.

Atgoffi'r Cynghorwyr a Swyddogion o'u cyfrifoldeb personol i ddatgan unrhyw fuddiannau personol a/neu niweidiol mewn perthynas ag unrhyw eitem o fusnes ar yr agenda hwn yn unol â Deddf Llywodraeth Leol 2000, Cyfansoddiad y Cyngor a'r Cod Ymddygiad ar gyfer Cynghorwyr a Swyddogion

A greener place Man gwyrddach



I gymeradwyo a llofnodi'r cofnodion canlynol:-

- 3 Grwp Gorchwyl Cartrefi Caerffili a gynhaliwyd ar 16 Ionawr 2020. 1 - 4

I dderbyn a nodi yr eitem(au) gwybodaeth ganlynol:-

- 4 Cyflwyniad Taliadau Tai yn ôl Disgresiwn.
- 5 Adroddiad Monitro Cyllideb 2019/2020. 5 - 14
- 6 Amcan Llesiant 3 - 2019/20 Diweddariad Cynnydd 6 mis (Ebrill - Medi 2019). 15 - 44

\*Os dymuna'r Aelod o Grŵp Gorchwyl Cartrefi Caerffili am yr adroddiad(au) wybodaeth uchod i gael eu dwyn ymlaen i'w trafod yn y cyfarfod, cysylltwch â Charlotte Evans ar 01443 864210, erbyn 10 a.m. ar ddydd Mercher 12 Chwefror 2020

- 7 I dderbyn unrhyw geisiadau am eitem i'w chynnwys ar yr agenda nesaf sydd ar gael.

#### **Circulation:**

Aelodau'r Grŵp Gorchwyl: Ms L. Pewtner, Mrs D. Moore, Ms M. James, Ms R. Thompson, M. Davies, L. Harding, A. Hussey, Mrs B. A. Jones, Ms S. Jones, L. Phipps, Mrs D. Price (Cadeirydd), Mrs E. Stenner, L.G. Whittle a Mr C. Davies (Is Gadeirydd),

A Swyddogion Priodol

#### **SUT FYDDWN YN DEFNYDDIO EICH GWYBODAETH**

Bydd yr unigolion hynny sy'n mynychu cyfarfodydd pwyllgor i siarad/roi tystiolaeth yn cael eu henwi yng nghofnodion y cyfarfod hynny, weithiau bydd hyn yn cynnwys eu man gweithio neu fusnes a'r barnau a fynegir. Bydd cofnodion o'r cyfarfod gan gynnwys manylion y siaradwyr ar gael i'r cyhoedd ar wefan y Cyngor ar [www.caerffili.gov.uk](http://www.caerffili.gov.uk). ac eithrio am drafodaethau sy'n ymwneud ag eitemau cyfrinachol neu eithriedig.

Mae gennych nifer o hawliau mewn perthynas â'r wybodaeth, gan gynnwys yr hawl i gael mynediad at wybodaeth sydd gennym amdanoch a'r hawl i gwyno os ydych yn anhapus gyda'r modd y mae eich gwybodaeth yn cael ei brosesu.

Am wybodaeth bellach ar sut rydym yn prosesu eich gwybodaeth a'ch hawliau, ewch i'r Hysbysiad Preifatrwydd Cyfarfodydd Pwyllgor Llawn ar ein gwefan <http://www.caerffili.gov.uk/Pwyllgor/Preifatrwydd> neu cysylltwch â Gwasanaethau Cyfreithiol drwy e-bostio [griffd2@caerffili.gov.uk](mailto:griffd2@caerffili.gov.uk) neu ffoniwch 01443 863028.



## CAERPHILLY HOMES TASK GROUP (WELSH HOUSING QUALITY STANDARD)

MINUTES OF THE MEETING HELD IN THE SIRHOWY ROOM, PENALLTA HOUSE, ON  
THURSDAY, 16TH JANUARY 2020 AT 5.00 P.M.

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PRESENT:

Mr C. Davies – Chair

Task Group Members:

M. Davies, A. Hussey, S. Jones, D. Moore, Mrs R. Thompson, L. Pewtner, L. Phipps, and L.G. Whittle.

Officers:

J. Roberts-Waite (Strategic Coordination Manager), P. Smythe (Housing Technical Manager), L. Allen (Principal Group Accountant – Housing) and C. Evans (Committee Services Officer)

### ANNOUNCEMENT OF THE CHAIR

Mr C. Davies, on behalf of the Caerphilly Homes Task Group extended their condolences to the family of Mrs Yvonne Bryant, Tenant Representative. It was noted that Mrs Bryant was a dedicated and committed Member of the group, and would make every effort, despite long-term illness to be in attendance and be an active participant in the Task Group meetings. Mrs Bryant was a valued member of the Task Group, and as a mark of respect, the Caerphilly Homes Task Group held a minute silence in her memory.

### 1. APOLOGIES

Apologies for absence were received from Councillors Mrs B. Jones, L. Harding and Mrs D. Price and Ms M. James – Tenant Representative.

### 2. DECLARATIONS OF INTEREST

Tenant Representatives C. Davies, S. Jones, D. Moore, Mrs R. Thompson and L. Pewtner declared a personal but not prejudicial interest in all agenda items as they are Council Tenants.

### 3. MINUTES – 31ST OCTOBER 2019

It was moved and seconded that the minutes of the last meeting held on 31 October 2019 be approved as a correct record and by a show of hands was unanimously agreed.

RESOLVED that the minutes of the meeting held on 31 October 2019 (minute no. 1-2) be approved as a correct record and signed by the Chair.

#### **4. CAERPHILLY HOMES – BUILDING TOGETHER**

The report, which was considered by Cabinet on 15th January 2020 and Housing and Regeneration Scrutiny Committee on 26th November 2019 outlined the vision to build new homes and increase housing supply in the county borough following the completion of the Welsh Housing Quality Standard in 2020.

The Caerphilly Homes Task Group (The Task Group) were advised that the Caerphilly Local Housing Market Assessment had identified a requirement of 282 units per annum over a period of 5 years in order to meet local demand. Members were advised that this is made up of 169 social housing rented units and 113 intermediate units. It was noted that there is a particular need for one bedroom accommodation.

It was noted that although there is currently a surplus of older person's accommodation throughout the county borough, the current provision does not meet the needs in terms of size, facilities and surrounding environment. This would need to be taken into account with any planned programme of development in order to ensure suitable accommodation is available for anticipated growth in demand for older persons.

The Task Group were informed of the research already undertaken in terms of the way forward by looking at what has already been done in other areas, discussions with industry experts on good quality and precision engineered homes and an ambition to produce zero carbon homes, in line with Welsh Government expectations. The report outlined plans for 400 new homes in the first instance which is considered a realistic target as these proposals will take time to develop.

The Task Group thanked the Officers for the report and discussion ensued.

The Task Group raised a number of concerns around the building of properties using a steel frame and explained that previous homes had been built in this fashion, which were later deemed to be unsafe and uninhabitable. Officers explained that whilst the previous issues are known, the steel frames are a new and innovative project; which will need thorough testing and would not be rolled out across the broader project. There is a similar scheme being undertaken in Bristol, however the scheme would be subject to rigorous testing. In addition, the Task Group were asked to note that there are some concerns with timber framed properties, in particular due to flammability, and the lifespan of the metal frames is approximately 60 years, which can also be recycled if needed.

A Task Group Member sought reassurance that brown field sites would be given priority for development. Officers confirmed that brown field sites would be given priority, however it was noted that this may not always be possible if the site is deemed not fit for purpose or has significant issues under the ground, and alternative sites would need to be sought. Brownfield sites under consideration include garage sites and a site adjacent to an Aneurin Bevan Health Board site, which is currently under investigation by United Welsh and a feasibility update should be provided at the next meeting.

Discussions took place around accommodation requirements and a Tenant Representative raised concerns for works underway at a Sheltered Accommodation site, in which some residents could lose their homes. Officers agreed to consider this and clarify queries with the tenant representative.

The Caerphilly Homes Task Group thanked the Officer for the report and noted its content.

## **5. WHQS FINAL STAGE PROGRESS REPORT/ POST 2020 ASSET MANAGEMENT PROGRAMME PROPOSALS**

The report, which was considered by Housing and Regeneration Scrutiny Committee on 26th November 2019 provided Members with an overview of the performance of the Welsh Housing Quality Standard (WHQS) Team to date and set out the anticipated projected performance up to December 2020. The report also included details of the current financial outturn to date for the 2019/20 WHQS works, and an overview of the many achievements that have been made as part of the wider commitments and benefits delivered by the WHQS programme. In addition, the report gave an overview of the Post 2020 Asset Management proposals which will commence following the successful completion of the WHQS programme.

The Task Group were advised that current and projected performance has demonstrated that full WHQS compliance is achievable prior to the December 2020 deadline. Due to recent concerns regarding the performance and quality of work by some contractors within the final stages of the programme, the remaining contracts have been allocated to the In-House workforce, which has resulted in a revised target completion date from March 2020 to June 2020 to allow for these additional 150 properties to be absorbed, but which is still ahead of the December 2020 deadline.

The Task Group noted details of the energy efficiency schemes and environmental projects delivered as part of the programme, together with the community benefits being achieved via the provision of training opportunities, placements and permanent jobs created through the in-house service and its partners. The Task Group were advised that customer satisfaction levels in respect of WHQS works are generally high, although it is accepted that customer satisfaction for external works continues to be less than those received for internal works. As a result, the WHQS Team has reviewed current practice and has now introduced telephone surveys in the first instance. The report also provided an analysis of the reasons for dissatisfaction for both internal and external works.

The Task Group noted the current and projected financial position of the programme as set out within the report, and it was explained that borrowing will be required for the second time since the programme commencement. In addition, it has also been confirmed that the housing business plan remains financially viable throughout the programme and to deliver the post-2020 strategy.

The Task Group thanked the Officer for the report and discussions ensued.

In regards to the surveys, a Task Group Member queried the process and noted that a survey was conducted in the Argoed area during spring 2019, but the works are not scheduled until 2020. Officers explained that the original surveys were undertaken too early, and as a result were often not accurate when it came to undertaking the works. Therefore, the surveys are now being undertaken shortly before the works commence, in order to provide a more accurate picture of requirements.

A Task Group Member sought further information on the future of the number of apprentices that were undertaken as part of the WHQS scheme. Officers explained that for the remainder of the scheme, works will be undertaken by the in-house workforce, there will be a requirement to conduct maintenance, further projects are planned post 2020 and, as the workforce is aging, investments into the apprenticeship scheme enables continuity and future proofing of the service.

A query was raised around procurement and the issues identified with some of the contractors and whether this has had an impact on the standard of works and completion dates of the scheme. Officers explained that this has had a significant impact on the scheme, and initial indications from Welsh Government suggested that the scheme would not be completed by

2020, however whilst there have been a number of successful relationships with the external workforce, it has been seen as prudent to minimise risk to the completion of the scheme and continue works with the in-house workforce, to ensure a timely and high quality completion of WHQS, whilst also ensuring tenant satisfaction.

Further queries were raised around delays to completion, however the Task Group were assured that whilst there could be some issues with completion due to inclement weather, it is anticipated that the works will be completed in June 2020, which still offers an additional 6 months before required completion is to take place for any snags.

The Caerphilly Homes Task Group thanked the Officer for the report and noted its content.

## **6. HOUSING REVENUE ACCOUNT BUDGET MONITORING – PERIOD 4 -2019/20**

The report, which was considered by Housing and Regeneration Scrutiny Committee on 15th October 2019 informed the Caerphilly Homes Task Group (The Task Group) of projected revenue expenditure for the Housing Revenue Account (HRA) for the 2019/20 financial year, and detailed the HRA capital programme which is predominantly funded by the HRA.

The report highlighted the distinction between the HRA, which is funded by rental income received from council tenants, and General Fund Housing activities, which fall under the General Fund and are funded by the Council taxpayer. Although there is a clear separation of these funds, the majority of council tenants rent is funded from housing benefits which are derived from the tax payers purse and therefore value for money must always be sought. The report outlined the projected outturn for the HRA based upon the expenditure and income for the first four months of the year.

The Task Group noted the HRA budget for 2018/19 of £51.7m with its main components consisting of £11m of salaries (net of WHQS funding), £935m of capital financing charges, £9.3m of response repairs, and £17m of revenue contributions to fund the WHQS programme. The spend on the HRA is self-financed mainly by the rental income collected from Council Tenants, of which around 71% is funded by Housing Benefits. The underspend at period 4 is projected to be £2.3m, with the reasons for this underspend set out at Sections 5.2 to 5.7 of the Officers Report.

Having considered and discussed the report, the Caerphilly Homes Task Group noted its contents.

## **7. TO RECEIVE ANY REQUESTS FOR AN ITEM TO BE INCLUDED ON THE NEXT AVAILABLE AGENDA**

The Task Group requested that the following items be presented to the next meeting:

1. A report was requested on Allocations – number of new applications and movements on the Housing Allocations Register.

The meeting closed at 6.19pm.

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CHAIR



## CAERPHILLY HOMES TASK GROUP – 13TH FEBRUARY 2020

**SUBJECT: HOUSING REVENUE ACCOUNT BUDGET MONITORING – PERIOD 7  
2019/20**

**REPORT BY: CORPORATE DIRECTOR FOR EDUCATION AND CORPORATE  
SERVICES**

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- 1.1 The attached report was circulated to the Housing and Regeneration Scrutiny Committee as an information item ahead of its meeting on 28th January 2020 and published on the Council's website.
  - 1.2 Members were invited to make any comments on the report directly to the Author and there were no comments subsequently received from the Scrutiny Committee.
  - 1.3 The Caerphilly Homes Task Group are now asked to consider the report and its recommendation as set out in Section 3.1 of the report.

Author: R. Barrett, Committee Services Officer, Ext. 4245

Appendices:

Appendix Report to the Housing and Regeneration Scrutiny Committee – For Information –  
Housing Revenue Account Budget Monitoring – Period 7 2019/20



## HOUSING AND REGENERATION SCRUTINY COMMITTEE – FOR INFORMATION

**SUBJECT: HOUSING REVENUE ACCOUNT BUDGET MONITORING – PERIOD 7  
2019/20**

**REPORT BY: CORPORATE DIRECTOR FOR SOCIAL SERVICES & HOUSING**

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### **1. PURPOSE OF REPORT**

- 1.1 To inform Members of projected revenue expenditure for the Housing Revenue Account (HRA) for the 2019/20 financial year. The HRA capital programme which is predominantly funded by the HRA is also included within this report.

### **2. SUMMARY**

- 2.1 Members will be aware of the distinction between the HRA, which is funded by rental income received from council tenants, and General Fund Housing activities, which fall under the General Fund and are funded via the Council taxpayer. Although there is a clear separation of these funds, the majority of council tenants rent is funded from housing benefits which are derived from the tax payers purse and therefore value for money must always be sought.
- 2.2 The report outlines the projected outturn for the HRA based upon the expenditure and income for the first seven months of the year
- 2.3 The HRA budget for 2019/20 is £51.7m with its main components consisting of £11m of salaries (net of WHQS funding), £9.5m of capital financing charges, £9.3m of response repairs, and £17m of revenue contributions to fund the WHQS programme. The spend on the HRA is self financed mainly by the rental income we collect from our Council Tenants of which about 71% is funded by Housing Benefits. The underspend at period 7 is projected to be £3.4m and the main reason for this is detailed below.

### **3. RECOMMENDATIONS**

- 3.1 Members are requested to note the contents of the report.

### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 To ensure that Members are informed of the projected financial position of the Housing Revenue Account

### **5. THE REPORT**

#### **5.1 Introduction**

- 5.1.1 The HRA is currently projecting a £3.4m under-spend, which represents about 6% of the total HRA budget. The main variances are summarised below and full financial details are provided in Appendix 1.



## **5.2 Salaries & Mileage (£550k under spend)**

5.2.1 Salaries and associated costs within the HRA are currently expected to underspend by some £550k against a £12m salary. There are some offsetting over and under spends in this area given the volume of staff which includes sickness cover, request for reduced hours and timing for filling vacant posts.

## **5.3 Non Pay related (£485k under spend)**

5.3.1 The main area of underspend is associated with office related costs of £285k such as stationery, photocopying, postage, office equipment, maintenance and cleaning. A further £200k underspend is attributable to budgets that are service specific such as void security, shop management, and catering & utility charges within our sheltered schemes.

5.3.2 Typically there are some budget areas within this category that tend to be quite volatile and therefore could generate further savings throughout the year, such as bad debt provisions, various housing projects and other office costs.

## **5.4 Building Maintenance & Response Repairs (£545k under spend)**

5.4.1 This area is currently projecting an underspend of some £545k. This is made up of £835k under spend in cyclical and revenue projects which includes damp proofing, non – DLO works, sheltered & infrastructure projects, gas & electrical servicing, and safety works, offset by a £290k over spend in Response Repairs which includes transport costs and sub contractors.

5.4.2 The increase in spend in Response Repairs is as a result of increased works associated with supporting the WHQS Programme. Integration within the HRO and WHQS teams has however been evidenced on areas such as mopping up works, electrical works for no access issues and ensuring all void properties are brought up to WHQS standard before being re-let. There has been additional income into this budget as a result of recharging the WHQS budget for the work, and efficiencies have also been made within the revenue projects budget where HRO have absorbed costs within its core budget.

5.4.3 The contingency budget of £500k is prudently assumed to be fully committed at this stage, but may release further savings if not fully utilised by year end.

5.4.4 As a result of incorporating the costs of delivering the Building Maintenance service within the HRA, the WHQS holding account was set up to monitor the in house workforce costs that are recharged to the WHQS capital programme. A budget of £10.5m has been allocated in 2019/20 along with an income recharge to the capital programme so that the HRA has a nil cost. This budget is currently projecting an increase spend of £244k but work is ongoing to ensure adequate resource is available as we head into the final stages of the WHQS programme.

5.4.5 A further budget is set in the HRA for the Management and Delivery of the WHQS Programme. Current projections are showing an underspend of some £625k due to staff turnover but as per the In house holding account, this is also recharged fully to the WHQS Programme and is therefore a nil cost to the HRA. The WHQS programme will therefore benefit from this saving.

## **5.5 Capital Financing Requirement (CFR) (£1m underspend)**

5.5.1 There is a CFR budget of £9.5m which is a Minimum Revenue Provision (MRP) of £2.6m to repay the HRA debt and £6.9m of interest charges. The HRA debt consists of historical debt and the debt which was taken up in 2015 as part of the Buy Out of the Housing Revenue Account Subsidy (HRAS) system. More recently the CFR debt has increased due to the borrowing needed to part fund the WHQS Programme (£23m in 2018/19) but this was not

actioned until the 2019/20 financial year where more favourable rates were available.

5.5.2 This has resulted in a lower CFR figure brought forward from 2018/19 year end than anticipated which means a lower MRP charge in 2019/20 (because MRP is charged a year after the borrowing has been taken up) and a lower interest charge (because the interest is applied against a lower figure) thus creating a £1m saving this year.

#### 5.6 **Income (£155k under spend)**

5.6.1 Based on our quarter 2 projections the HRA income is likely to increase slightly. Income varies throughout the year especially on rental and service charges due to void fluctuations.

#### 5.7 **Revenue Contributions to Capital Outlay (RCCO) (£625k under spend)**

5.7.1 The HRA allows for some £17m of revenue contributions towards the WHQS Programme and this includes an element for the WHQS management team responsible for the delivery of the WHQS Programme which is anticipating a £625k underspend as explained in 5.4.5 above.

5.7.2 The total expenditure on the WHQS capital programme as at period 7 is some £23m against a budget of £56m. £7.3m of the spend relates to internal spend and £12.8m relates to external spend with the remainder on large scale voids, garages and works of adaptations

5.7.3 The HRA RCCO allocation will fund this budgeted spend in addition to the £7.3m Major Repairs Allowance (MRA) from Welsh Government, with the remaining balance being funded from HRA working balances and borrowing

5.7.4 Borrowing of £23m was taken up for the first time since the start of the WHQS Programme to fund expenditure in 2018/19. A further £34m borrowing was projected for 2019/20 based on a £56m spend in that financial year. However, due to recent concerns regarding the performance and quality of work by some of the DPS (Dynamic Purchasing System) contractors within the final stages of the programme, it has been agreed to allocate the remaining contracts to the In-House workforce. This has resulted in a revised target completion date from March 2020 to June 2020 to allow the In-House workforce time to absorb the additional properties (approx. 150). This is still ahead of our deadline of December 2020.

5.7.5 The budget therefore needs to span 2 financial years and has been reprofiled accordingly. The revised estimate is a £45m spend in 2019/20 and £11m spend in 2020/21 to finalise the WHQS Programme by June 2020. Borrowing requirements have also been reprofiled to match the revised anticipated spend and £15m is expected to be required in 2019/20, instead of the original £34m.

5.7.6 WHQS Internal works as at week 35 (29/11/19) is 94.23% compliant – monitored weekly

5.7.7 WHQS External works at week 35 (29/11/19) is 89.38% compliant – monitored monthly

5.7.8 Full WHQS compliance (where properties have achieved both internal and external compliance) is 77.73% achieved up to 29/11/19

5.7.9 100% full compliance is expected to be achieved by June 2020 ahead of the December 2020 deadline.

5.7.10 A Post Asset Management Strategy (PAMS) working group has been set up to ensure that the WHQS standard is continuously maintained once full compliance is achieved. A 5 year external programme is currently being worked on which will be costed out and applied to the Housing Business Plan to ensure it remains financially viable. A viable Housing Business Plan has to be submitted to Welsh Government as part of the annual MRA application. The next submission is due on the 31<sup>st</sup> March 2020.

## **5.8 HRA Working Balances**

- 5.8.1 Working balances at the start of 2019/20 financial year were £5.5m. This is expected to be fully utilised this year against the WHQS Programme
- 5.8.2 Whilst priority will be given to the delivery and achievement of the WHQS Programme, borrowing may be required to increase the supply of council housing to meet the Welsh Governments proposal that 20,000 new homes be delivered in Wales by 2021 (Caerphilly Homes Building Together report presented to Housing & Regeneration Scrutiny Committee on 26<sup>th</sup> November 2019)

## **6. ASSUMPTIONS**

- 6.1 Assumptions linked to this report were detailed in the budget report to Council on 21st February 2019.
- 6.3 The projected outturn position is based on actual income and expenditure details to the end of October 2019, together with data used to forecast future income and expenditure, following discussions with Managers.

## **7. LINKS TO RELEVANT COUNCIL POLICIES**

- 7.1 The contents of this report are in accordance with the Budget Strategy agreed by Council at its meeting on 21st February 2019.
- 7.2 Effective financial planning and financial control contribute to the following Well-being Goals within the Well-being of Future Generations (Wales) Act 2015: -
- A prosperous Wales.
  - A resilient Wales.
  - A healthier Wales.
  - A more equal Wales.
  - A Wales of cohesive communities.
  - A Wales of vibrant culture and thriving Welsh Language.
  - A globally responsible Wales.

## **8. WELL-BEING OF FUTURE GENERATIONS**

- 8.1 Effective financial management including the effective utilisation of external grant funding is a key element in ensuring that the Well-being Goals within the Well-Being of Future Generations (Wales) Act 2015 are met

## **9. EQUALITIES IMPLICATIONS**

- 9.1 This report is for information purposes, so the Council's Equalities Impact Assessment (EqIA) process does not need to be applied.

## **10. FINANCIAL IMPLICATIONS**

- 10.1 As detailed throughout the report.

## **11. PERSONNEL IMPLICATIONS**

11.1 There are no direct personnel implications arising from this report.

## **12. CONSULTATIONS**

12.1 There are no consultation responses that have not been reflected in this report.

## **13. STATUTORY POWER.**

13.1 Local Government Acts 1972 and 2003 and the Council's Financial Regulations.

Author: Lesley Allen, Principal Group Accountant, Housing  
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Consultees: Cllr J Ridgewell, Chair Housing & Regeneration Scrutiny Committee  
Cllr C Forehead, Vice Chair Housing & Regeneration Scrutiny Committee  
Cllr L. Phipps, Cabinet Member for Homes, Places and Tourism  
D Street, Corporate Director Social Services  
S Couzens, Chief Housing Officer  
S. Harris – Interim Head of Business Improvement Services and Acting S151 Officer  
F Wilkins – Public Sector Housing Manager  
P Smythe – Housing Technical Manager

Appendices:

Appendix 1 HRA Financial Plan 2019/20 (Period 7).

<b>HOUSING</b>	Page	<b>Estimate</b>	<b>Projected</b>	<b>Variance</b>
	No	<b>2019/2020</b>	<b>2019/2020</b>	<b>2019/2020</b>
<b><u>HOUSING REVENUE ACCOUNT</u></b>		£	£	£
<b><u>SUMMARY</u></b>				
<b>GENERAL MANAGEMENT</b>		1,236,433	1,202,032	34,401
<b>CAPITAL FINANCING</b>		9,503,210	8,450,389	1,052,821
<b>CENTRAL RECHARGES</b>		2,292,722	2,290,477	2,245
<b>STRATEGY AND PERFORMANCE</b>		1,747,372	1,348,952	398,420
<b>PUBLIC SECTOR HOUSING</b>		5,616,070	5,304,251	311,819
<b>SUPPORTED HOUSING</b>		-	-	-
<b>BUILDING MAINTENANCE SERVICES</b>		31,354,060	29,891,697	1,462,363
<b>GROSS EXPENDITURE</b>		51,749,867	48,487,798	3,262,069
<b>INCOME</b>		(51,749,867)	(51,905,689)	155,822
<b>(SURPLUS)/DEFICIT CONTRIBUTION (TO)/FROM WORKING BALANCES</b>		-	(3,417,891)	3,417,891
<b><u>HOUSING REVENUE ACCOUNT</u></b>		£	£	£
<b><u>GENERAL MANAGEMENT</u></b>		1,236,433	1,202,032	34,401
<b><u>CAPITAL FINANCING COSTS</u></b>				
Interest Charge		6,903,221	6,314,414	588,807
Principal		2,556,989	2,092,975	464,014
Debt Management		43,000	43,000	-
Resheduling Discount		-	-	-
<b>EXPENDITURE TO HRA SUMMARY</b>		9,503,210	8,450,389	1,052,821
<b><u>CENTRAL RECHARGES</u></b>				
Central Recharges		1,810,175	1,810,175	-
Grounds Maintenance recharge to HRA		482,547	480,302	2,245
<b>EXPENDITURE TO HRA SUMMARY</b>		2,292,722	2,290,477	2,245

<b><u>HOUSING REVENUE ACCOUNT</u></b>		£	£	£
STRATEGY & PERFORMANCE		143,299	88,305	54,994
PERFORMANCE DEVELOPMENT		693,118	454,467	238,651
COMMUNICATIONS & ENGAGEMENT		117,281	115,764	1,516.67
TRANSFORMING LIVES & COMMUNITIES		793,674	689,756	103,918
HOUSING SUPPLY (HRA)		-	660	(660)
<b>EXPENDITURE TO HRA SUMMARY</b>		<b>1,747,372</b>	<b>1,348,952</b>	<b>398,420</b>
<b><u>HOUSING REVENUE ACCOUNT</u></b>		£	£	£
<b><u>PUBLIC SECTOR HOUSING</u></b>				
Landlord General		173,862	151,259	22,603
Sheltered Accommodation		1,477,027	1,334,360	142,667
Holly Road Community Support		3,922	4,224	(302)
Eastern Valley AHO		679,443	732,636	(53,193)
Upper Rhymney AHO		831,354	836,050	(4,696)
Lower Rhymney Valley AHO		33,091	37,621	(4,530)
Gilfach NHO		-		-
Lansbury Park NHO		357,514	326,952	30,562
Graig Y Rhacca NHO		288,836	271,234	17,602
Housing Allocations Cont.		144,839	111,406	33,433.36
Tenants & Communities Involment		510,761	405,452	105,309
Leaseholders Management		66,167	80,713	(14,546)
Tenancy Enforcement		283,474	269,936	13,538
Rents		811,455	788,083	23,372
Community Wardens		(45,675)	(45,675)	-
<b>EXPENDITURE TO HRA SUMMARY</b>		<b>5,616,070</b>	<b>5,304,251</b>	<b>311,819</b>

<b><u>HOUSING REVENUE ACCOUNT</u></b>		<b>£</b>	<b>£</b>	<b>£</b>
<b><u>RESPONSE REPAIRS &amp; MAINTENANCE</u></b>				
<b><i>Employee Expenses net of recharges</i></b>		<b>1,470,448</b>	<b>1,265,870</b>	<b>204,578</b>
<b><i>Repairs &amp; Maintenance on Housing Stock</i></b>				
Responsive Repairs		9,340,056	9,602,223	(262,167)
Revenue Contribution to Capital - WHQS Programme		17,086,210	16,461,773	624,437
Group/Planned Repairs (priorities 5 & 8)		-	-	-
Void Repairs (priority 6)		-	-	-
Revenue Projects		1,444,000	987,861	456,139
Planned Cyclical		1,747,336	1,367,320	380,016
Planned Programme		-	-	-
		<b>29,617,602</b>	<b>28,419,176</b>	<b>1,198,426</b>
<b><i>Transport Related</i></b>		<b>42,800</b>	<b>36,156</b>	<b>6,644</b>
<b><i>Supplies &amp; Services</i></b>		<b>223,210</b>	<b>170,494</b>	<b>52,716</b>
<b><i>EXPENDITURE TO HRA SUMMARY</i></b>		<b>31,354,060</b>	<b>29,891,697</b>	<b>1,462,363</b>

<b><u>HOUSING REVENUE ACCOUNT</u></b>		£	£	£
<b><u>INCOME</u></b>				
<b><u>Rents - Dwelling</u></b>				
Gross Rent - Dwellings		(45,563,933)	(46,059,025)	495,092
Gross rent - Sheltered		(4,556,918)	(4,234,242)	(322,676)
Gross Rent - Hostel		-	-	-
Voids - General Needs Dwelling/Sheltered		815,000	774,272	40,728
Add'l Income O/Side Rent Debit (WHQS)		-	(1,693)	1,693
Voids - Hostel		-	-	-
Net Rent		<b>(49,305,851)</b>	<b>(49,520,688)</b>	<b>214,837</b>
<b><u>Rents - Other</u></b>				
Garages		(355,307)	(351,563)	(3,744)
Garage Voids		157,163	135,939	21,224
Shop Rental		(59,872)	(64,612)	4,740
		<b>(258,016)</b>	<b>(280,235)</b>	<b>22,219</b>
<b><u>Service Charges</u></b>				
Sheltered - Service Charges		(1,447,744)	(1,419,270)	(28,474)
Sheltered - Heating & Lighting		(151,798)	(116,369)	(35,429)
Sheltered & Dispersed- Alarms		-	-	-
Catering Recharge - Sheltered Accommodation		(33,438)	(17,227)	(16,211)
Voids Schedule Water		69,741	65,150	4,591
Non Scheduled Water Rates		(45,654)	(39,943)	(5,711)
Welsh Water Commission		(546,807)	(546,807)	-
Leaseholder - Service Charges		(10,000)	(10,000)	-
		<b>(2,165,700)</b>	<b>(2,084,465)</b>	<b>(81,235)</b>
<b><u>Government Subsidies</u></b>				
Housing Subsidy		-	-	-
		-	-	-
<b><u>Interest Receivable</u></b>				
Mortgage Interest		(300)	(300)	-
Investment Income		(10,000)	(10,000)	-
		<b>(10,300)</b>	<b>(10,300)</b>	<b>-</b>
<b><u>Miscellaneous</u></b>				
Miscellaneous		-	-	-
Private Alarms		-	-	-
Ground Rent		(10,000)	(10,000)	-
		<b>(10,000)</b>	<b>(10,000)</b>	<b>-</b>
<b><u>INCOME TO HRA SUMMARY</u></b>				
		<b>(51,749,867)</b>	<b>(51,905,689)</b>	<b>155,822</b>





## CAERPHILLY HOMES TASK GROUP – 13TH FEBRUARY 2020

**SUBJECT: WELLBEING OBJECTIVE 3 - 2019/20 PROGRESS UPDATE  
6 MONTHS (APRIL – SEPTEMBER 2019)**

**REPORT BY: CORPORATE DIRECTOR FOR EDUCATION AND CORPORATE  
SERVICES**

- 
- 1.1 The attached report was circulated to the Housing and Regeneration Scrutiny Committee as an information item ahead of its meeting on 28th January 2020 and published on the Council's website.
  - 1.2 Members were invited to make any comments on the report directly to the Author and there were no comments subsequently received from the Scrutiny Committee.
  - 1.3 The Caerphilly Homes Task Group are now asked to consider the report and its recommendation as set out in Section 3.1 of the report.

Author: R. Barrett, Committee Services Officer, Ext. 4245

Appendices:  
Appendix Report to the Housing and Regeneration Scrutiny Committee – For Information – Wellbeing Objective 3 – 2019/20 Progress Update 6 Months (April-September 2019)



## HOUSING AND REGENERATION SCRUTINY COMMITTEE – FOR INFORMATION

**SUBJECT: WELLBEING OBJECTIVE 3 - 2019/20 PROGRESS UPDATE  
6 MONTHS (APRIL – SEPTEMBER 2019)**

**REPORT BY: CORPORATE DIRECTOR OF SOCIAL SERVICES AND HOUSING**

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### 1. PURPOSE OF REPORT

- 1.1 This report provides members with a 6 month progress update against Well-being Objective 3: *'Address the availability, condition and sustainability of homes throughout the county borough and to provide advice, assistance or support to help improve people's well-being'*.

### 2. SUMMARY

- 2.1 The Well-being Objective is set for five years - 2018-2023. This is the 6 month progress update of the second year.
- 2.2 Being this is the midpoint of the second year of a five year objective only partial progress against the overall objective has been made. We know from monitoring service provision that the services we have delivered throughout this period continue to make a positive impact on the well-being of people who access these services.

### 3. RECOMMENDATIONS

- 3.1 Members are requested to consider the content of the report and to satisfy themselves that progress is being made at the 6 month stage of the 2018-2023 Well-being Objective assessment.

### 4. REASONS FOR THE RECOMMENDATIONS

- 4.1 That members are informed and have the opportunity to challenge progress and have assurance that the Council is working towards successfully delivering the well-being objectives within the 2018-2023 Corporate Plan.

### 5. THE REPORT

- 5.1 Eight key aims have been devised to help achieve the successful realisation of this Well-being Objective:
- 1a. All council housing is improved to meet the Welsh Housing Quality Standard (WHQS) by 2020;

- 1b. Implement an asset management strategy to maintain the condition of the housing stock following WHQS attainment (post-December 2020);
2. Increase the provision of new, affordable, social housing that meet the 'Lifetime Homes' principles and identified needs, whilst supporting the governments' innovative housing programme;
3. Deliver adaptations to support the health and well-being of people in their homes and maximise the delivery and appropriate use of accessible homes;
4. Increase the supply of housing by supporting opportunities to bring long-term, empty homes in the private sector back into use;
5. Tackle the determinants of poor health and wellbeing by improving housing conditions in the private sector;
6. Prevent homelessness and tackle rough sleeping;
7. Sustain tenancies by providing a range of housing related services; and
8. Help reduce fuel poverty by making homes more energy efficient and providing people with advice on how best to heat their homes.

### **What has gone well**

5.2 Good progress has been made against each of the eight priorities which underpin this objective. Below are some examples of the achievements to date:

- The WHQS investment programme being on track to be completed by the Welsh Government target date of December 2020. We know from surveys that customer satisfaction is high with internal works but lower for external works. We also know from research carried out by Carmarthenshire Council and Swansea University that the improvements made to tenants' homes as part of the programme have a positive impact on health and wellbeing.
- This year our housing associations partners are expected to access £8.4m of Welsh Government funding to build new affordable homes in the borough to address housing needs identified by the Council. In addition, the housing associations are building 57 highly insulated homes in two locations and the Council has purchased 11 ex-Council properties to add to the 5 purchased last year (total funding accessed - £1.58m).
- We have spent approximately £843k providing a range of adaptations to enable disabled people to live independently in their own homes, including funding services provided by Care & Repair.
- We have provided financial assistance to landlords to support bringing long-term empty homes in the private sector back into beneficial use. And through our enforcement action have returned 18 long-term empty homes in the private sector back into beneficial use.
- We have also provided loans and grants totalling approximately £95k to improve owner-occupied homes. We know from national research that this type of funding will have a positive impact on the health and wellbeing of the occupants of poor quality housing.
- Through the Caerphilly Keys scheme we have secured the use of an additional 13 private sector rental properties this year to provide much needed accommodation for people experiencing homelessness. This has resulted in approximately 50 Caerphilly Keys properties now being utilised to assist with homelessness.
- We continue to assist Council housing tenants to sustain their tenancies by reviewing our housing management procedures. We also continue to provide support and assistance to tenants to mitigate the impact of welfare reform. We have referred 10 tenants threatened with homelessness to Citizens' Advice where a Debt Relief Order or bankruptcy order could be considered to prevent the homelessness situation.
- Attempted to tackle fuel poverty through a range of methods including the provision of new energy efficient heating and insulation through the WHQS programme, applying for

Welsh Government funding to carry out energy efficiency improvements, providing energy efficiency advice and referring people to the Nest scheme regarding energy efficiency improvements and prepared a 'statement of intent' for ECO (Energy Company Obligation) Flexible Eligibility funding.

- Despite the continued roll out of Universal Credit, the number of housing evictions has not increased, largely due to the continued support provided by officers aimed at sustaining tenancies through budgeting advice, energy advice, support to maximise income, employment referrals and assistance with housing options.

### **What has not gone well**

5.3 In some instances the actions we have undertaken have either exceeded their target date for completion and/or not reached the expected level of performance:

- The percentage of tenants who are satisfied with the external works carried out under the WHQS investment programme, albeit reasonably high, is lower than those satisfied with internal works. We have improved the level of communication provided to tenants in an attempt to increase satisfaction and, as a result, we have seen a slight increase in the level of satisfaction.
- Issues with the DPS contractors have resulted in an extension of the target date for WHQS compliance from March 2020 to June 2020.
- A reduction in capacity of the Housing Strategy team has caused a delay in producing the Local Housing Strategy. As a result we plan to commence work on the strategy later on in the year. We were unable to expend our full allocation of Welsh Government Affordable Housing Grant funding to increase the supply of Council homes due to prioritising the WHQS programme, the lack of existing procurement arrangements, WG timelines and a lack of in-house expertise to project manage this process.
- Due to continued staff absence further meetings of the empty property corporate working group have not been held. The officer has returned to work and we expect to see an improvement in progress shortly.
- The publishing of the Statement of Intent for ECO (Energy Company Obligation) Flexible Eligibility funding has been delayed further but a draft is now in place. As a result, the statement will now be published later than originally planned.

### **Impact**

5.4 Appendix B provides a series of examples demonstrating the positive impact that the actions we have undertaken can have on people's well-being.

### **Conclusion**

5.5 It is difficult at this early stage of the process to make predictions about the likely outcome of this objective at year five; however, our evidence shows that good progress has been made to date against each of the key aims which underpin the objective. Should progress be maintained over the course of the next 3½ years we are confident that this will result in a significant improvement in people's well-being.

## **6. ASSUMPTIONS**

6.1 The successful completion of the actions detailed in Appendix A is directly affected by a range of external factors. Too numerous to list here, they include UK and Welsh Government

policy/legislation, the economy, building costs including, land, materials and labour, demographic changes, sufficient levels of expenditure and the demand for services.

6.2 The resources to deliver this Well-being Objective have been assessed within the context of the current Medium Term Financial Plan.

## **7. LINKS TO RELEVANT COUNCIL POLICIES**

7.1 The Well-being Objective links to the following Council policies:

- Caerphilly County Borough Council Corporate Plan 2018-2023
- Caerphilly Homes Service Plan 2018-2023
- Caerphilly Homes Asset Management Strategy
- Gwent Homelessness Strategy and Action Plan 2018-2023
- Private Sector Housing Renewal Strategy (2014)
- Strategic Equality Plan 2016-2020

### **Welsh Government Policies**

7.2 Improving Lives and Communities: Homes in Wales (Welsh Government, 2010), sets out the national context for improving homes and communities, including the energy efficiency of existing homes.

## **8. WELL-BEING OF FUTURE GENERATIONS**

8.1 The Well-being Objective is both wide ranging and multifaceted. We know that the provision of good quality housing and related services has positive health and well-being outcomes by, for example, providing safe and secure places to live, promoting vibrant and sustainable communities, providing employment and training opportunities and minimising the impact of our actions on the environment. We have identified that the successful accomplishment of this objective clearly links to 5 of the 7 national well-being goals:

- A prosperous Wales
- A resilient Wales
- A healthier Wales
- A more equal Wales
- A Wales of cohesive communities

8.2 The five ways of working listed below, as defined within the sustainable development principle of the Well-being of Future Generations Act 2015, provides a framework which enables the Council to demonstrate that its proposed actions take into consideration the well-being of future generations:

8.3 Long term – Housing is a long-term social need and, therefore, the housing and services we provide are set within this context. The outcomes we are attempting to achieve in the short to medium term will ensure that housing is sustainable (cost, quantity, condition and location) for people to occupy over the longer term, whilst minimising the effects on the environment and contributing the health and wellbeing of our communities.

8.4 Prevention – The quality of housing has a direct correlation with the health and wellbeing of its occupants. Preventing people from becoming homeless by providing access to good quality accommodation and related services, creating communities that are sustainable and vibrant by working with agencies to tackle anti-social behaviour and help communities become resilient, reducing poverty by maximising incomes, providing advice and support to sustain tenancies, all impact positively on health and wellbeing. The WHQS objective of improving homes, lives and communities will also help tackle local unemployment connecting to the

employment related well-being objective. It will improve the look and feel of the environment and this can help to prevent anti-social behaviour as people have pride in where they live.

- 8.5 Integration – Given that the provision of good quality housing is central to the good health and wellbeing of the population, it is likely that this objective will impact on the successful outcome of other objectives. The provision of good quality housing is, therefore, likely to have a positive impact on the budgets and priorities of other public bodies such as the National Health Service and it is important, therefore, that we work closely with such organisation to address shared priorities.
- 8.6 Collaborate – In order to facilitate successful outcomes, we will collaborate with a range of different organisations and people. These include Welsh Government, Rent Smart Wales, internally with other departments, regionally with other local authorities, building contractors, housing associations, third sector organisations, private sector landlords, empty property owners etc. We acknowledge that the constraint on public sector finances means that this is an area we will need to look at doing more of to share resource and achieve joint outcomes, and the need to collaborate has, therefore, become more essential.
- 8.7 Involvement – Given the broadness of this objective, we will need to work with a range of different groups if we want to achieve a successful outcome. Our intention is to involve a wide range of people including homeowners, private rented sector and Council tenants, tenants and residents associations, elected members, public sector bodies, third sector organisations etc. The level of involvement will differ between actions and organisations. We know that the quality of our services have been improved by involving a range of key stakeholders in their redesign.

## **9. EQUALITIES IMPLICATIONS**

- 9.1 No impact assessment has been undertaken on this report, however many individuals and groups who fall under the protected characteristics, and wider issues covered by the Council's Strategic Equality Plan, are often affected to a greater extent by poverty, vulnerability and the related causes; therefore any reduction in resources would have a negative impact on those individuals and groups.
- 9.2 Equalities Implication processes may be applied to any of the actions contained within the appended update reports or any new actions that may be implemented over the life of this objective.

## **10. FINANCIAL IMPLICATIONS**

- 10.1 The delivery of many of the actions contained in Appendix A is dependant on the continuation of funding either from Welsh Government via the various grant streams or the Council from the General Fund and the Housing Revenue Account. Ongoing budget pressures facing local government and the requirement for service areas to satisfy the Council's medium term financial plan priorities may impact on our ability to improve current levels and standards of service delivery and to identify additional resources to invest in new services to meet the changing needs and aspirations of our service users.
- 10.2 The resources to deliver both objectives are assessed within the context of the current Medium Term Financial Plan.

## **11. PERSONNEL IMPLICATIONS**

- 11.1 There are no personnel implications in this report.

## 12. CONSULTATIONS

12.1 Consultation responses have been reflected in this report.

## 13. STATUTORY POWER

13.1 The update of the Well-being Objectives is part of the Local Government Measure 2009 and the Well-being of Future Generations (Wales) Act 2015.

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Christina Harrhy	- Interim Chief Executive
Cllr Lisa Phipps	- Cabinet Member for Homes, Places & Tourism
Cllr John Ridgewell	- Chair of Housing & Regeneration Scrutiny Committee
Cllr Christine Forehead	- Vice Chair of Housing & Regeneration Scrutiny Committee
Dave Street	- Corporate Director of Social Services & Housing
Lynne Donovan	- Head of People Services
Stephen Harris	- Interim Head of Business Improvement Services & Section 151 Officer
Rob Tranter	- Head of Legal Services and Monitoring Officer
Paul Smythe	- Housing Technical Manager
Fiona Wilkins	- Housing Services Manager
Jane Roberts-Waite	- Strategic Co-ordination Manager
Sue Cousins	- Housing Solutions Manager
Lesley Allen	- Principal Accountant (Housing)
Rhian Kyte	- Head of Regeneration & Planning
Ros Roberts	- Business Improvement Manager
Shelly Jones	- Supporting People Manager
Mark Jennings	- Housing Strategy Officer

Background Papers:  
Corporate Plan 2018-2023 - available from the Council's website

Appendices:  
Appendix A - Well-being Objective 3: 6 Month Performance Report 2019/20  
Appendix B - Well-being Case Studies

# Caerphilly County Borough Council Well-being Objectives

3. Address the availability, condition and sustainability of homes throughout the county borough and provide advice, assistance or support to help improve people's well-being

2019/20 progress update  
6 months (Apr – Sept 2019)

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YOUR HOMES, YOUR FUTURE





## CCBC Well-being Objectives - 2019/20 Mid-Year Update

### Reporting for Scrutiny

#### 1. Overall Summary Statement

This is the midpoint of the second year of a five year objective and, as such, only partial progress against the overall objective has been made. We know from monitoring service provision that the services we have delivered throughout this period continue to make a positive impact on the people who access these services. In order to achieve some of our aims, we continue to work proactively with our housing association and other third sector partners to deliver services that make a real difference to people's lives, e.g. the provision of new affordable housing to meet identified housing needs and advice and assistance to help people manage their finances. Based on a review of the evidence presented below, it is the view of the Housing Management Team that good progress continues to be made against the achievement of this objective, and that the objective remains relevant and continues to be our priority.

We continue to strive to provide a varied range of housing services in a prolonged and challenging economic environment. Ongoing budget pressures facing local government and the requirement to satisfy the Council's medium term financial plan priorities may impact on our ability to improve current levels and standards of service delivery and to identify additional resources to invest in new services to meet the changing needs and aspirations of our service users. In addition, changes by the UK Government to the Welfare Benefits system to make the system simpler and make sure people are better off in work than on benefits has in some instances had a negative impact on household income, affecting tenancy sustainability and contributing to an increase in homelessness, which ultimately can impact on service delivery.

Earlier on in the year we made some minor amendments to the aims which underpin this objective. This was to ensure that our operational priorities closely reflect those of the objective. There has been no material effect on the objective as a result of these amendments. The amendments were reported to Scrutiny Committee as part of the 2018/19 mid-year update.

#### 2. What has gone well?

Good progress has been made against each of the eight priorities which underpin this objective. Some examples of the achievements to date include:

1. The WHQS investment programme being on track to be completed by the Welsh Government target date of December 2020. We know from surveys that customer satisfaction is high with internal works but lower for external works. We also know from research carried out by Carmarthenshire Council and Swansea University that the improvements made to tenants' homes as part of the programme have a positive impact on health and wellbeing.
2. This year our housing associations partners are expected to access £8.4m of Welsh Government funding to build new affordable homes in the borough to address housing needs identified by the Council. In addition, the housing associations are building 57 highly insulated homes in two locations and the Council has purchased 11 ex-Council properties to add to the 5 purchased last year (total funding accessed - £1.58m).
3. We have spent approximately £843k providing a range of adaptations to enable disabled people to live independently in their own homes, including funding services provided by Care & Repair.
4. We have provided financial assistance to landlords to support bringing long-term empty homes in the private sector back into beneficial use. And through our enforcement action have returned 18 long-term empty homes in the private sector back into beneficial use.
5. We have also provided loans and grants totalling approximately £95k to improve owner-occupied homes. We know from national research that this type of funding will have a positive impact on the health and wellbeing of the occupants of poor quality housing.
6. Through the Caerphilly Keys scheme we have secured the use of an additional 13 private sector rental properties this year to provide much needed accommodation for people experiencing homelessness. This has resulted in approximately 50 Caerphilly Keys properties now being utilised to assist with homelessness.
7. We continue to assist Council housing tenants to sustain their tenancies by reviewing our housing management procedures. We also continue to provide support and assistance to tenants to mitigate the impact of welfare reform. We have referred 10 tenants threatened with homelessness to Citizens' Advice where a Debt Relief Order or bankruptcy order could be considered to prevent the homelessness situation.
8. Attempted to tackle fuel poverty through a range of methods including the provision of new energy efficient heating and insulation through the WHQS programme, applying for Welsh Government funding to carry out energy efficiency improvements, providing energy efficiency advice and referring people to the Nest scheme regarding energy efficiency improvements and prepared a 'statement of intent' for ECO (Energy Company Obligation) Flexible Eligibility funding.
9. Despite the continued roll out of Universal Credit, the number of housing evictions has not increased, largely due to the continued support provided by officers aimed at sustaining tenancies through budgeting advice, energy advice, support to maximise income, employment referrals and assistance with housing options.

We currently use a range of methods to communicate the results/outcomes of the actions undertaken under each aim. These included press releases through the Council's communications team or through a partners' team, through social media, the Council's website and via a tenants' newsletter.

### **3. What has not gone well? And what are we learning?**

We have noted a number of challenges throughout the year that have impacted on the following actions:

1. The percentage of tenants who are satisfied with the external works carried out under the WHQS investment programme, albeit reasonably high, is lower than those satisfied with internal works. We have improved the level of communication provided to tenants in an attempt to increase satisfaction and, as a result, we have seen a slight increase in the level of satisfaction.
2. Issues with the DPS contractors have resulted in an extension of the target date for WHQS compliance from March 2020 to June 2020.
3. A reduction in capacity of the Housing Strategy team has caused a delay in producing the Local Housing Strategy. As a result we plan to commence work on the strategy later on in the year. We were unable to expend our full allocation of Welsh Government Affordable Housing Grant funding to increase the supply of Council homes due to prioritising the WHQS programme, the lack of existing procurement arrangements, WG timelines and a lack of in-house expertise to project manage this process.
4. Due to continued staff absence further meetings of the empty property corporate working group have not been held. The officer has returned to work and we expect to see an improvement in progress shortly.
5. The publishing of the Statement of Intent for ECO (Energy Company Obligation) Flexible Eligibility funding has been delayed further but a draft is now in place. As a result, the statement will now be published later than originally planned.

Should current progress continue as present then we are optimistic of successfully meeting our outcomes. Barriers to the successfully achieving this outcome are considered in section 1.

#### **4. What impact are we making?**

Our objective is to help improve people's wellbeing through a range of targeted housing-related interventions. Although a five year objective, for some the improvement will be noticed sooner as some of our actions are annually repetitive in nature, e.g. the provision of adaptation or the building of new homes. National research shows that good quality housing, located in sustainable communities is known to have a positive impact of the health and wellbeing of its occupants. Therefore, our objective, our aims and our actions are intrinsically linked to the seven wellbeing goals of the Well-being of Future Generations (Wales) Act 2015. As such we are increasingly using the five ways of working to ensure that we take into account the impact of our intended actions on the wellbeing of future generations.

#### **5. What is our future focus (for the next 6 months to a year?)**

Our focus for the future is clearly outlined in detail in Appendix A below. The appendix lists the range of actions that we intend to carry out over the 5 year period to successfully achieve the intend outcome of improving people's health and well-being through the provision of a range of housing and support services. By using the 5 ways of working we know there should be a long-term positive impact on the well-being of Caerphilly residents. By completing these reviews we can try to ensure that we make good progress to successfully achieving the intended outcome. The Well-being of Future Generations (Wales) Act 2015 provides an effective frame work to review existing services, where required, and to implement new services.

## Appendix A Detailed Progress Tracking – Our Steps to Deliver (2018-2023)

Outcome	Progress 2019/20	Dates
<b>1a. All council housing is improved to meet the WHQS by 2020</b>		
Deliver the annual capital investment programme for both internal and external works.	<p>£23m prudential borrowing for WHQS was delayed until 2019/20 due to more favourable rates. Original 2019/20 budget for WHQS of £56m has to be re-profiled to June 2020 to match the intended completion date, therefore, £45m estimated spend for 2019/20 and borrowing requirement has reduced accordingly for the remainder of the programme.</p> <p>Issues with the DPS contractors have resulted in 150 properties being transferred to our in-house team thus extending our internal target date from March 2020 to June 2020.</p> <p>Mid year compliance shows 91.78% internal work completed and 83.92% external works completed. Internals projected to be completed by 29/5/20 and 01/05/20 for externals based on current compliance rates. Adverse weather conditions or unforeseen issues could affect this but the programme is on target to meet the WG deadline of December 2020 and our own internal target date of June 2020.</p>	Annually reoccurring 2020
Comply with Part 6 of the WHQS by undertaking environmental improvements to make communities attractive and safe.	Of the 82 communities identified within the county borough, consultations and engagement events have been completed in 62, are ongoing in 19 leaving only 1 outstanding. Estimated expenditure is currently £10.1m and the programme is on track to deliver all schemes by March 2021.	
Comply with Part 7 of WHQS by undertaking adaptations where a need is identified.	OT assessments on-going till the end of programme with adaptations being provided where a need is identified.	

Outcome	Progress 2019/20	Dates
<b>1b. Implement an asset management strategy to maintain the condition of the housing stock following WHQS attainment (December 2020)</b>		
Develop a draft Asset Management Strategy.	Action completed. Strategy report completed and approved by Cabinet.	Jul-2018
Consult tenants on the draft strategy.	Action completed. Consultation exercise undertaken via a tenant newsletter. The consultation responses were supportive of the strategy proposals.	Aug-2018
Carry out an EIA screening exercise on draft Asset Management Strategy.	Action completed. An EIA will be considered for the individual elements of the Strategy.	Aug-2018
Present finalised strategy to Cabinet for approval.	Action completed. Strategy and report approved by Cabinet in September 2018.	Sep-2018
Ensure that our asset management systems inform the delivery plan by identifying key component replacement needs based on life cycle estimates.	Over 240 internal contracts have been validated. External contracts by default are being validated as part of the Post 2020 Asset Management Strategy particularly for the earlier contracts. Some validation required for the later contracts which is ongoing. Work has commenced on validating the Acceptable Fails within the system to ensure an accurate record at the end of the programme and also to identify any potential work into the Post 2020 programme.	Dec-2019
Produce a delivery plan detailing future planned maintenance programmes and the development of new council housing.	Additional properties are currently in the process of being bought back and will be included in the post 2020 programme. This includes ex council homes and cemetery houses. There is also an opportunity to create further units in some of our sheltered schemes from guest rooms and kitchens.	Mar-2019
Undertake a review of the existing WHQS procurement strategy.	Due to recent concerns regarding the performance and quality of work by the DPS contractors it has been agreed to allocate their remaining contracts to the in-house team. This has resulted in a revised target completion date from March 2020 to June 2020 to allow the team to fit the additional 150 properties into their programme. This is still ahead of our deadline of December 2020.	Mar-2019

Outcome	Progress 2019/20	Dates
Options for remodelling of sheltered schemes to be determined.	Action completed. Cabinet approval obtained in September 2018 to enable proposed projects to proceed. 1 scheme to be brought back into main programme for planned completion in 2020.	Sep-2018
Ensure that the HRA business plan remains financially viable.	Monitoring of business plan ongoing. New model recommended by WG has recently been procured. New model has been tested in year and will be submitted as part of the 2019/20 MRA application (March 2019).	Quarterly
Review resource and contract arrangements for delivery of asset management strategy.	Now we are in the final stages of the programme meetings are being held with managers of WHQS/HRO to look at future resource requirements. CMT approved in principle to fully integrate WHQS/HRO teams with a move from Cherry Tree House to Tir-y-berth, subject to another service area or private tenant taking over CTH.	Dec-2019
<b>2. Increase the provision of new, affordable, social housing that meet the 'Lifetime Homes' principles and identified needs, whilst supporting the governments' innovative housing programme.</b>		
Produce a Housing Strategy which provides a framework for the provision of housing and related support.	A procurement exercise will commence throughout the Autumn to appoint an appropriate consultant to lead the development of a LHS. It is anticipated that an appointment will be made during quarter 4 of the current financial year.	Ongoing
Complete the Local Housing Market Assessment which will identify the number, type and location of homes required and will help look at solutions.	A LHMA will be undertaken in 2020 to coincide with the review of the Local Development Plan. A draft project plan has been produced and is in the process of being finalised.	2017/18 (then every 2 years)
Complete the Gypsy Traveller Accommodation Assessment, which will identify the number, type and location of pitches to be provided.	Following a discussion with the planning team it has been agreed to undertake the GTAA earlier than planned to coincide with the review of the Local Development Plan. A draft project plan has been produced and is in the process of being finalised.	Mar 2021
Produce and submit quarterly to Welsh Government the programme delivery plan, based on the evidence of housing need.	We are currently working with our housing association partners on the production of a Q3 PDP, which will be submitted to WG in Nov 2019. Some schemes in the plan have had to be moved around but we remain on track to achieve full spend.	Yearly

Outcome	Progress 2019/20	Dates
Review designation of council accommodation for smaller households in light of changing demands.	Action completed. Cabinet approval obtained in September 2018 to re-designate specific identified older people's properties for general needs, and approval given for officers to re-designate additional older person's accommodation to general needs in future, in consultation with the Cabinet Member.	2018/19
Housing Associations complete bid for innovative housing programme Phase 2	Action completed. Pobl submitted a bid for Coronation Road, Blackwood and St Mary's Church, Pontllanfraith but were unfortunately unsuccessful in both cases.	2018/19
<p>Start on site for innovative housing programme – Phase 2:</p> <ul style="list-style-type: none"> <li>• Develop 38 units to Passivhaus standard at the former Caerphilly Magistrate's Court (Linc Cymru)</li> <li>• Develop 17 units to Passivhaus standard at the former Cwm Ifor primary school (United Welsh)</li> </ul>	<p>Linc Cymru: The roof covering which features the thin film photovoltaic panels is currently being installed to the main flat block. Internally, first fix has started to both the houses and flats. The units are now expected to be handed over in February 2020 based on current progress. There have been considerable design complications due to the complexity between Passivhaus, NHBC and Build Regulations.</p> <p>UWHA: Extensive grouting works have been completed to bring the site to a point where construction can commence Groundworks are currently ongoing creating levels and laying drainage and shaping highways and foundations.</p> <p>Full 3D designs have been provided by Beattie Passive and the Celtic Horizons (CH) operatives have received their training on the method of constructing the timber frames. Our Community Investment team are engaging with the MoD, tenants and local groups to offer training opportunities to work alongside the CH operatives. It is estimated that 12 training places will be created.</p> <p>Once the foundations are in (est. November 2019) the flying factory will be set up with the manufacture of the first timber frames before Christmas.</p>	2021/22



Outcome	Progress 2019/20	Dates
Complete an evaluation of the Passivhaus and Beattie Passive schemes.	To be commenced on completion of the above task.	2021/22
Commencement of the Local Authority Build Programme: yr. 1 acquisition of empty properties; yr. 2 acquisition of empty properties and new build programme	<p>10 acquisitions completed with refurbishment either commenced or planned. Total project costs of £1.3m (including on-costs).</p> <p>Proposals to provide 3 additional units by way of conversion in advanced planning stage. Due on site in Q4.</p> <p>A report has been drafted which outlines the Council's proposals for increasing the supply of affordable homes and new build. The report has been discussed by CMT, is scheduled to be presented to PDM on 23rd October and will then move on through to Cabinet for approval. A draft Development Strategy will follow approval of the report.</p> <p>A development / land consultant is currently being procured to undertake development appraisals and viability assessments on land within the HRA and also two larger sites that have recently been identified.</p> <p>Agreement reached to purchase 8 new build properties by way of the Section 106 Agreement with the new properties being brought into council ownership.</p> <p>A potential development partner has also been engaged via the SCAPE framework together with architects via the WPA (Welsh Purchasing Alliance) arrangement.</p>	2018-2021

Outcome	Progress 2019/20	Dates
<b>3. Deliver adaptations to support the health and well-being of people in their homes and maximise the delivery and appropriate use of accessible homes</b>		
Provision of appropriate minor works of adaptation across all tenures by expenditure of the available Social Services budget.	Total spend in this period of £100,085 consisting of 404 individual adaptations (excluding WHQS programme).	2018-2023
Provision of appropriate major works of adaptation in public and private sector housing via the spending of available capital funding and Welsh Government ENABLE funding.	Total spend in this period of £628,853 (£349,853 - private, £279,799 public), consisting of 148 individual adaptations - 75 private and 73 public (excluding WHQS programme).	2018-2023
The provision of discretionary relocation grants in cases where the existing property is not suitable to adapt to meet the needs of the disabled resident.	Total spend in the year of £31,310, which included an extensive major works of adaptations.	2018-2023
Continued partnership working with Care and Repair enabling the elderly and infirm to receive additional assistance via a range of initiatives including the Rapid Response Adaptations Programme and Independent Living Grant.	Total spend in this period of £80,000, consisting of 210 individual adaptations (203 RRAP and 7 ILGs), which included those adaptations listed in B2 above.	2018-2023
<p>159932            Complete the ongoing categorisation exercise to identify accessibility levels of the social housing stock owned by the council and its partner landlords.</p>	<p>As of 01/11/19, 5,088 Council properties (10,675) are medically categorised and being updated via the mandatory void process through Abritas.</p> <p>A repository has been developed which currently holds 3,883 housing association properties. The repository will be updated with stock and medical categories for all social housing stock.</p> <p>Proactive involvement from the housing partners is now required to assist with the current stock profile; partners will update their stock profile list with the medical codings.</p> <p>HOT to contact all partners by Jan 2020 (delay of development of repository due to housing IT capacity). Updated profiles to be provided by landlords quarterly. HOT to monitor ongoing progress. Currently the percentage of partner landlord properties that are coded is not yet known.</p>	2018-2023

Outcome	Progress 2019/20	Dates
Improve accessibility of current stock that lends itself to meeting demand for accessible housing.	One property in Caerphilly was improved from B1 to A2 to meet unmet need, with stair lift installation. This was achieved via Enable funding working together with the Housing Repair Operations team and void works. Total spend of £3,888.	2018-2023
Work with housing association partners and the occupational therapist (housing) to deliver accessible housing.	<p>United Welsh Housing Association have developed a small site in Deri, consisting of 8 older person 2 bed bungalows and a 3 bed adapted bungalow.</p> <p>We are working closely with UWHA and Pobl to identify and acquire up to 3 properties on the open market to meet accessible housing needs that can't be met due to limitations of the existing stock.</p>	2018-2023
<span style="writing-mode: vertical-rl; transform: rotate(180deg); position: absolute; left: -40px; top: 50%; font-weight: bold;">S</span> Providing assistance to support bringing long-term empty homes in the private sector back into beneficial, use including loans.	In this period, 5 owner-occupier loans, relating to empty properties have been awarded, a total £95,500 of financial assistance.	As and when need arises
<span style="writing-mode: vertical-rl; transform: rotate(180deg); position: absolute; left: -40px; top: 50%; font-weight: bold;">S</span> Targeting the owners of empty properties with two ad hoc initiatives.	The Council is signed up to the Valleys Taskforce initiative, a grant based system for owners of empty properties who intend to occupy. This is run through RCT council and funding is available for all participating councils through 2019/20.	2022/23
Update the empty homes database using information from Council Tax.	Annual update of database for 2019/20 completed – 1,624 properties.	Annually recurring
Undertake a baseline analysis of the empty homes database.	<p>Risk Assessments completed. Information being collated to assist with strategic and operational planning.</p> <p>Collation not completed due to key staff absences.</p> <p>Updated database for 2019/20 obtained from Council Tax.</p>	Mar-2019

Outcome	Progress 2019/20	Dates
Set up and maintain a corporate empty homes working group.	Due to continued staff absence further meetings have not been held.  However, largely as a result of the previous meeting, joined up working between departments has occurred when dealing with empty properties.	Annually recurring
Use the information from the empty homes database to produce a GIS layer of empty homes in the borough, thereby informing strategic action.	Meeting has taken place in October 2019 with Housing IT to develop spatial mapping layers.	Mar-2020
<b>5. Tackle the determinants of poor health and wellbeing by improving housing conditions in the private sector.</b>		
Undertake a publicity exercise to increase awareness of NEST scheme to private sector landlords.	The Housing benefit section has received a leaflet from NEST to send to PRS tenants. The leaflet will be sent out by the end of Nov 2019.	Mar-2020
Administering financial assistance to landlords via loans and conversion grants.	2 landlord loans awarded to date. 7 enquiries for assistance outstanding.	Annually recurring
Enforcement of housing legislation to ensure minimum standards are met in the private rented sector both in properties in single and multiple occupations, including repair, prohibition and demolition, where appropriate.	14 HMO inspections were successfully completed in this period.	
Working in partnership with Rent Smart Wales to drive up standards in the private rented sector.	Approximately 86.7% of rented properties in the borough are now registered. (As per RWS, estimated 9,730 PRS dwellings, 8,435 of which are registered). The number of WG estimated PRS properties has increased, resulting in a decrease of our percentage.	
Help vulnerable people, living in properties in an EPC band E, F or G, get funding towards heating and insulation upgrades in their homes, under the Flexibility Eligibility ECO3 fund, by issuing declarations qualifying households.	Work in progress and virtually complete so that a procurement exercise can be undertaken. It is now hoped the Statement of Intent will be in place by January 2020.  A bid has also been submitted via Rent Smart Wales to the Warm Homes fund to target the worse properties within in the PRS,	Mar-2022

Outcome	Progress 2019/20	Dates
	which will work alongside the Statement of intent when it is finalised.	
Following receipt of a referral from British Gas, as part of the Welsh Government Nest scheme, carry out inspections of properties to assess whether they meet the requirements of the housing health and safety rating system (HHSRS) to be able to access a package of free energy efficiency improvements.	To date we have received 20 NEST referrals. All properties have been assessed as satisfactory in terms of hazards and NEST has been notified.	Mar-2023
<b>6. Prevent homelessness and tackle rough sleeping</b>		
Work in partnership with local authorities in the region to produce a Regional Homelessness Strategy and local action plan.	Action completed. Regional Homelessness Strategy and Action Plan approved by Cabinet on 12/12/18.	2018/19
Pilot a shared housing project for single people under 35 and evaluate its success.	Project terminated after Pilot House Share project suspended due to issues with occupancy agreements and the cost implications under the Housing Benefit 'exempt status' categorisation.	2018/19
Undertake the rough sleeper provision project between (December to March) each year.	We will continue to support the rough sleeper winter program for 2019/20 and typically preparations and night shelter planning start in Sept 2019. An updated Inclement Weather Policy will be required to reflect the plans for the forthcoming period of assistance we facilitate for rough sleepers.	2018 - 2023
Explore potential model of 'Housing First' to reduce the level of homelessness for people who are unable to maintain tenancies due to mental health, substance misuse or chaotic lifestyles.	Substantial WG funding has been made available to Pobl to meet the Housing First agenda in areas of Gwent. Locally, Caerphilly Keys, our in-house private sector access scheme, is being considered for a housing first model for own borough, with tenancy support from our Rough Sleeper Coordinator partners.	2018/19
Work in partnership to provide support for rough sleepers through tackling underlying needs e.g. substance misuse.	Action incorporated into above action.	Annually recurring
<b>7. Sustain tenancies by providing a range of housing related services</b>		
Provide mental health training for key housing staff.	Negotiations ongoing with Workforce Development for the	2018-2020

Outcome	Progress 2019/20	Dates
	procurement of approved 'Mental Health First Aid' training programme for 2019/20 and 2020/21 for targeted Housing staff.	
As part of the review our housing management policies and procedures take into consideration mental health issues.	<p>Ongoing and recurring. 7 reviews have been completed to date:</p> <ul style="list-style-type: none"> <li>• Landlords Consent Procedure</li> <li>• Sheltered Housing Officer Guidance Manual</li> <li>• Electrical Periodic Testing</li> <li>• Management Discretion Procedure</li> <li>• Offer Procedure - ongoing</li> <li>• Mutual Exchange</li> <li>• Succession.</li> </ul>	Ongoing on renewal dates
Work with disability organisations to review signposting arrangements.	Action completed. Representative of DEWIS attended Senior Managers Briefing to raise awareness of the resource. Managers to cascade information to their staff and consider uploading information on our services to DEWIS.	Annually recurring
Work closely with the Supporting People Team to identify additional support services.	Work ongoing to explore options for providing additional support to vulnerable tenants.	
Provide help to tenants to enable them to budget effectively, to claim the correct welfare benefits and to mitigate the consequences of welfare reforms.	During this period 1,019 tenants were visited and provided with advice and guidance. In August 2019, 1 FTE additional tenancy support officer role and 1 FTE welfare benefits role were added to the structure for a period of 12 months. We will continue to monitor key performance measures to consider if there is a need for a permanent change to the structure. Rent arrears have increased slightly in comparison with the same period the previous year (3.15% compared with 2.89% in September 2018).	
Provide advice to tenants on energy usage and other measures to help save money.	109 tenants were provided with key energy advice in this period. This included assistance with applications for assistance from energy providers and direct energy savings advice.	

Outcome	Progress 2019/20	Dates
<b>8. Help reduce fuel poverty by making homes more energy efficient and providing people with advice on how best to heat their homes</b>		
Submit bids to the Welsh Government under Arbed or other energy efficiency initiative funding to carry out energy efficiency improvements in the private and public sector.	A number of meetings have been held with Welsh Government and ARBED to establish a way forward to ensure the proposed Lansbury Park scheme progresses.	Ongoing
Provide advice to Council tenants on energy saving measures and energy usage and installations.	Ongoing. Type of advice given is to signpost residents to appropriate grant agencies that could assist the resident that may qualify for energy grant funding (e.g. Welsh Government's Nest scheme).	Upon request
Roll out Energy Performance Certificates (EPC) surveys to the councils housing stock to establish level of existing energy ratings.	7,100 from a stock of 10,680 have been checked for the current EPC's, this equates to 66% of the stock. The remaining stock is in the current programme to be checked.	Annually recurring
Roll out contract for upgrading loft insulation to all council owned properties.	Arrangements are in place with the Housing Repair Operations Team to undertake loft insulation upgrades via voids. 34 upgrades were carried out in this period.	Apr-2020
Publish a 'statement of intent' for ECO (Energy Company Obligation) Flexible Eligibility funding to direct assistance towards private sector homes at risk of fuel poverty.	The Statement of Intent will be published once the procurement exercise has been finalised (anticipated January 2020). Internal meetings have been held with procurement to refine the statement to ensure it accurately reflects the needs of the residents.	Mar-2019

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In order to monitor progress against the actions outlined in the table above and over progress of this well-being objective we maintain wider range of datasets. These data sets are maintained on a number of different IT systems and are monitored at regular intervals to ensure against underperformance.

Performance Against Adopted Tracking Measures	Outcome	18/19 Actual	2019/20 Target	2019/20 Qtr. 2	Comment
No. of homes compliant with WHQS (fully, external and internal elements)	1	6,116	10,717	7,616	*Fully compliant homes. Q2 = 71.22%. Total stock reduced to 10,694 due to RTB's
The percentage of tenants whose homes have been improved internally who are satisfied with completed WHQS works	1	86%	80%	87%	
The percentage of tenants whose homes have been improved externally who are satisfied with completed WHQS works	1	71%	80%	79%	
11 Outcome measures from the Supporting People programme based on wider determinants of homelessness prevention.	2, 7, 8	3-3097 6-3649	3-3173 6-3831	7004	3173 individuals were supported to manage their accommodation 3831 individuals were supported to manage their money
Increased number/size/type of new, affordable homes delivered through the housing associations or the Council, including how the home was delivered - e.g. via IHP etc.	2	5	N/a	0	5 AHG acquisitions in 2018/19. 11 AHG acquisitions in 2019/20 pending and 2 conversion projects. IHP funding projects expected to be delivered towards the end of Q4 and in 2020/21.
The number of homes delivered through the Innovative Housing Programme	2	N/a	N/a	0	See comment above.
Increase the percentage of social housing stock that has an accessibility code	3	4,968	N/a	5,088*	*Council properties only. HA properties to commence from Q3 onwards.
Increased number of accessible, social homes provided.	3	1	N/a	1	One property improved using Enabling funding.
The number of adaptations provided ( major and minor works)	3	1,413	N/a	552	Consisting of minor and major works.
The number of grants/loans provided to improve housing in the	5	4	N/a	22	Consisting of House into Homes



Performance Against Adopted Tracking Measures	Outcome	18/19 Actual	2019/20 Target	2019/20 Qtr. 2	Comment
private sector (e.g. Houses into Homes, Home Improvement loans, conversion grants, Home Repair grants and HMO loans)					loans, Landlord loans and owner-occupier loans.
Increase the number of long-term private sector empty homes brought back into beneficial use	4	2.29%	2.2%	1.10%	% of empty private sector properties brought back into use during the year through direct action by the local authority (PAM13) (accumulative)
The number of homelessness cases by outcome (sections 66, 73 & 75)	6	75.5%	N/a	74.3%	
		34.6%		22.7%	
		77%		80.5%	
The number of homelessness instances prevented through successful mediation	6	33	N/a	19	
The number of mortgage rescue cases completed	6	4	N/a	2	
Number of tenants visited and provided with support and advice to help mitigate the effects of welfare reform	7	2,035	N/a	1,019	
Number of council tenants supported to access the benefits they are entitled to	7	827	700	412	
Value of financial savings (£) generated for council tenants as a direct result of support	7	£628k	£250k	£416k	
Number of council tenants visited and provided with advice regarding energy saving measures and energy use	8	176	N/a	109	
Number of council properties provided with energy efficiency measures as a result of external grant funding by type of measure	8	0	N/a	0	See comment below.
The amount of external funding (£) accessed by the council for home energy efficiency improvements	8	£0	N/a	£0	A bid has been submitted to WG to complete the remaining 97 private properties in Lansbury Park. We are awaiting the outcome of the submission.
The number of residents referred to the Nest scheme for energy efficiency advice	8	276	N/a	133	Email sent to Nest for data

### **Case Study 1**

Mr X lived alone with no support; he had complex mental health, physical and substance misuse needs. Previous service provisions had failed owing to him not engaging.

WHQS works started on his home and early on there were issues, the tenant was upset and displaying challenging behaviour, this was potentially going to mean that works to the property would be terminated. A tenant liaison officer and occupational therapist were drafted in to support the gentleman. Rapport building was imperative and as the trust and relationships developed WHQS works were able to continue uninterrupted.

Mr X had some physical issues which were not being addressed, as well as support needs for the short and longer term. The workforce had provided positive company to the tenant, and in the period of time that the work was undertaken he showed a vast improvement in his mood and humour. To address the physical needs the occupational therapist arranged a joint visit with Mr X's GP to discuss some ongoing health concerns, this resulted in a recommendation for weekly visits from the district nurses.

Mr X had very little in the way of furniture (he slept on a mattress on the floor), he was a heavy smoker and had some continence issues. With support the WHQS team secured funding for a bed frame, wardrobe and a washing machine. Supporting people were approached to provide some additional support and his property was cleaned up and the new furniture put in place. The fire brigade were then contacted to provide fire retardant coverings.

Mr X had never used a washing machine before and the task of teaching him fell to me. With task analysis and an understanding of his needs the occupational therapist was able to successfully set up a system whereby he was able to independently wash his clothes; this vastly improved his independence and personal appearance.

Mr X was also identified as a person living in fuel poverty, he had debts for gas and electric totalling almost £800, with some help from supporting people we were able to sort out the bills and it transpired that he was over £400 in credit. Following on from the positive relationships developed during the WHQS works Mr X started to engage with statutory services, and his care was handed to social services following the end of the WHQS works to his home.

### **Case Study 2**

The tenant moved into their property and contacted the tenancy support team (TSO) for assistance as their Housing Benefit claim had not transferred to her new address and arrears were building up. The tenant was under the impression that a change of address was completed at the time of move but this was found not to be the case.

The tenant lives with her son and they both suffer with ill health. The tenant and her son are both in receipt of Employment Support Allowance.

During the visit the TSO completed a new Housing Benefit form as the tenant was out of time for a change of address and requested a backdate for Housing Benefit and Council Tax reduction. A full review of the tenant's finances was undertaken and found she was entitled to reduced water tariff an application was completed by the TSO resulting in an annual saving of £100. Fuel and energy advice was also provided by the TSO who discovered the tenant had very high fuel debts for gas and electricity. The TSO completed an application to the British Gas Energy Trust for assistance with these debts as the tenant was suffering financial hardship. The application was successful and a grant of £2,000 was awarded to pay off the fuel debt.

### **Case Study 3**

A visit was requested by a tenant whose husband had recently passed away. The tenant's late husband had dealt with all of the finances and his wife had limited knowledge of the finances and no family was able to assist. The TSO visited and assisted the tenant to claim Universal Credit and made a claim for Council Tax reduction. During a 6 week period the TSO supported the tenant with budgeting and setting up other bills in her own name. A great deal of support was also needed to ensure the tenant could manage her Universal Credit journal. The tenant informed the TSO that she didn't know how she would have managed without her help and a very difficult time and it made all the difference to her mental health knowing there was someone there she could turn to for assistance.

### **Case Study 4**

A Supporting People provider had been supporting a gentleman for approximately 3-months. His initial support needs were to support him to maximise his income as well as budgeting. He was struggling financially due to receiving no hours / works on his current zero hour work contract. He was at risk of losing his current accommodation due to limited finances.

The following supported was provided:

- He had already applied for Universal Credits and received an advanced payment.
- He was just about managing to pay his rent however struggling to buy food. As such food vouchers were provided.
- He was supported to apply for DHP, this was awarded for a 3-month period
- We managed to get his UC advanced payment deferred for a 3-month period
- He now has available money however this is a short term solution and he acknowledged that moving forward he would need to find full time employment
- He was supported with CV writing
- We supported him to apply for a 2-week fork lift training course which he successfully passed

Now that he is qualified he is applying for job roles and is looking certain to be back in employment soon.

## Case Study 5

A referral was received for Ms X who is a homeowner. She has a history of mental health issues; she is schizophrenic and has attempted suicide twice. At a young age she suffered a stroke, which impacted upon her mobility. During the first visit, it became apparent that Ms X's support needs were much wider than just that of what was requested in the initial referral. The following issues were identified:

- There was a hole in the landing ceiling and the wall and floor below had significant water damage. There was mould and mildew where the rainwater had been coming in from the roof. The electric lights weren't working properly and there was a gap of around 2 inches between the toilet and bathroom extension, and the kitchen. The front room window had shards of glass around the edge where children, whilst playing football in the street, had smashed the front pane of her double-glazed window.
- Discussing her situation with her, Ms X also advised that she had run up a significant debt of over £3,000 in electricity arrears. This had happened when her gas boiler had broken down and she had been using old electrical fires to try and heat the front room.

The following support was provided:

A £10,000 private housing grant was successfully applied for and over the next 10 months Ms X's property benefited from:

- A roof repair and renewal of insulation
- Hallway ceiling and walls repaired and decorated
- A full re-wire of the property
- A new roof put onto the extension
- Renewal of floorboards in the front room
- A new double-glazed window, and, (after I smelt gas at the property and her gas then cut off for safety reasons)
- A full gas service and renewal of old pipes that were condemned and identified as dangerous.

In addition, and after many weeks of discussions between SSE and the support worker, the electricity arrears of £3,000 were wiped clean. She was put back onto a standard meter after safety issues were raised with SSE regarding Ms X's total reliance upon care workers to put credit on her key fobs (and her supply had twice run out over the winter period). She was also put on to a much cheaper tariff. She was supported to migrate from DLA to PIP and although initially unsuccessful, after a Mandatory Reconsideration was completed she was awarded the higher rate for both mobility and daily care. As such, her money increased by approximately £248 every 4 weeks.

A water metre was installed and her monthly water rates costs were reduced to around a quarter of what she had been paying. She is now in a much better financial position. Family and friends are visiting more often, and are also talking about staying with her for extended periods during the summer. Her outlook on life is much

more positive and she hasn't shown signs of extended depression for the past two years. She has the odd day where she feels down, but these are very rare.

### **Case Study 6**

The Sheltered Housing Officer noticed that one tenant regularly stored alcohol bottles to the side of their armchair, which later developed into the consumption of stronger alcohol substances.

The tenant began to look very unkempt and had lost a significant amount of weight; in addition they were suffering from frequent falls. Their flat was also becoming very untidy so the Sheltered Housing Officer provided further support with additional visits.

Whilst the property conditions improved for approximately 12 months the tenant continued to purchase alcohol at the local shop on a daily basis in addition to daily visits to the pub, which left him intoxicated. Unfortunately, the health and the mobility of the tenant deteriorated and as a result, they were admitted to hospital during which time the family worked with Council staff so that a property inspection could be undertaken. Property conditions were poor and the tenant had substantial rent arrears. The appropriate referrals were made by the Sheltered Housing Officer to enable the tenant to be fully supported following their discharge from hospital. The tenant's property underwent a deep clean and support was put in place for laundry, shopping and cleaning in addition to a payment plan to clear the rent arrears and a direct debit set up to ensure that future rent payments were made on time.

The tenant attended regular appointments with GDAS for a period of 12 months and was successfully discharged as being non alcohol dependant. 18 months on, the tenant continues to be non alcohol dependant and lives life to the full. The tenant regularly socialises with other sheltered housing tenants and enjoys attending day trips and holidays. The tenant has continued to look after their flat and has purchased new carpets and furniture. In addition, the tenant has given up smoking and no longer requires the high level of housing related support that they were previously receiving.

### **Case Study 7**

A disabled tenant living at one of the Sheltered Housing Schemes was always very happy and content. However the Sheltered Housing Officer began to notice a change in the tenant as they became depressed and stated they were struggling with money. The tenant consented to the Sheltered Housing Officer looking at their bank statements and it was discovered that there were a significant number of transactions that the tenant claimed they hadn't consented to or made. A family member of the tenant was in control of the tenant's finances at the time and it was a clear that there was financial abuse.

The Sheltered Housing Officer completed a referral to Social Services and the Safeguarding Team, which triggered a safeguarding case with Police involvement. The tenant raised concerns with the Sheltered Housing Officer as they became anxious of their family member visiting in an aggressive state. The Sheltered

Housing Officer completed a support plan review and made regular visits. Target hardening equipment was also put in place to offer the tenant some reassurance. The police stopped the family member having contact with the tenant during the investigation and the tenant regained control of their own finances.

The Sheltered Housing Officer offered support with finances and assisted the tenant by completing application forms for additional benefits which were awarded to the tenant. The tenant's life began to improve and they were able to go forward controlling their own finances which increased their independence, improved their emotional wellbeing and allowed them to make their own decisions.