

## Introduction

### The Trust ten years on

In January, I presented a report to Bath & North East Somerset Council's Healthier Communities and Older People Overview and Scrutiny Panel which detailed how the Trust has delivered the promises made to its tenants at transfer in 1999.

Based on the existing levels of funding at the time of transfer, it is estimated that the local authority would have only been able to invest £36 million compared to the £118 million actually invested by the Trust. The table opposite shows the amount of work achieved.

In addition, 93 BISF homes have been refurbished; residents are being consulted on the external insulation of 79 Wimpey No-Fines homes, planned for completion in 2009; and a major redevelopment and refurbishment programme is in place for the Trust's remaining 328 pre-cast reinforced concrete (PRC) homes. The first handovers of both new and refurbished homes already completed, are attracting high levels of satisfaction from residents.

Continued on page 2...

	Target	Actual	Declined	2009
Windows	5,839	5,643	0	201
Bathrooms	6,691	5,072	1,454	555
Kitchens	6,720	5,169	1,413	555
Boilers*	1,952	1,099	0	1,045
Heating	3,098	2,917	0	675
Rewiring	5,609	5,617	0	600
Insulation	5,500	6,004	0	500
Smoke alarm***	8,230	3,330	0	4,900
Entry phone	932	416	0	516
Roofing**	1,301	892	0	647
Gutters etc.	3,958	3,938	0	200

\* Boilers have been replaced when required

\*\* Roofing refers to the number of units which include flats rather than the number of roofs

\*\*\* Avon and Somerset Fire is carrying out the installation of smoke alarms in 2009



(l to r) Trust resident Lee Harragin; the Trust's first chair, Cllr Adrian Inker; Bath and North East Somerset Council's chair, Cllr David Bellotti; Trust managing director, Angela Gascoigne; and current Trust chair, John Bader.

## Celebrating our 10th anniversary!

Residents and staff joined together to celebrate ten years of Somer Community Housing Trust, with a special reception at the Guildhall in Bath.

The event took place on 31st March, the exact date that Bath and North East Somerset Council transferred its homes to the housing association, which it set up.

Cllr David Bellotti, the Chair of the Council, was the guest of honour at the reception, hosted by the Trust's

Chair, John Bader. Other guests included former board members and staff, and key partners in the area. Together they marked the contribution the Trust has made for its residents and within Bath and North East Somerset, along with the huge investment the Trust has made to improve its homes.

...continued from front page.

## Rent increases

While this year saw the highest rent rise in the Trust's history due to the Government's rent restructuring regime to bring housing association and local authority rents into line, the Trust has kept the promise it made to tenants not to increase rents more than inflation plus 1% for the first five years following transfer.

The table below shows the rent rises over the years.

	00/01	01/02	02/03	03/04	04/05	05/06	06/07	07/08	08/09	09/10
<b>RPI</b>	1.1%	3.3%	1.7%	1.7%	2.8%	3.1%	2.7%	3.6%	3.9%	5.0%
<b>Rent increase</b>	1.0%	1.0%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%
<b>Total</b>	2.1%	4.3%	2.2%	2.2%	3.3%	3.6%	3.2%	4.1%	4.4%	5.5%

The success of the Trust has its origins in the courage shown by Bath and North East Somerset Council, which made the decision to give its tenants the opportunity to vote for what they wanted, and offered them a vision of a different way of working which would deliver real improvements in the quality of its homes and services.

Angela Gascoigne  
Managing Director  
angela\_gascoigne@somer.org.uk

## A new vision

Work is nearing completion on the creation of a new vision for the next 10 years, to equal that which has brought the Trust to where it is today. The conversation which the board started in early 2008 with residents, colleagues and partners on values, purpose and goals to take us to 2020, has resulted in a commitment to a refreshed set of values and a new sense of purpose. While these will be finalised by the board later this year as part of the business planning process, the draft values and purpose are set out below. We are keen to hear your views and comments.

The values which best represent what the Trust stand for have emerged as:

- Respect
- Community
- Involvement
- Affordable for our customers

These four values describe best what the Trust has always stood for and gives us a firm foundation for making decisions about our future direction.

The purpose which has developed over the last few months has three parts:

- To provide homes where people can thrive.
- To provide services which enable people to fulfil their potential.
- To invest in the creation of neighbourhoods where people want to live.

We want to provide good-quality **homes** which meet the social as well as the physical requirements of our customers. We do not want to 'warehouse' people in 'units' which are 'adequate'. A home is more than a shelter from the elements.

The **services** we provide to older people ensure that each individual is able to contribute as they wish to their community, to do as much as they can for themselves and for others, and to continue to learn from and look forward to life every day, for as long as possible.

Whilst it is the people who live in the neighbourhood who create the community, we see our role as an investor of money, skills and time, to work alongside people in the creation of places which people are proud to call home.

Our goals for the next 10 years are ambitious and frankly, just a bit scary! In summary, we want to be recognised as a catalyst for change within communities, as a partner with a reputation for creativity and as an employer where people love Monday mornings!

But we know that we have to start with our core services – consistently delivering what people want and always improving. We want to make sure that tenants feel in control of their homes, their neighbourhoods and of their services. And we want to examine parts of our business which we can carefully grow commercially, so that we can invest the profits into assets and services, beyond those paid for by rent, which will benefit our customers.

The board decided in March this year to continue this conversation about the future so that we can make sure that our next 10-year business plan, taking us to 2020, will be one to which many people have contributed and which people fully understand.

Angela Gascoigne  
Managing Director  
angela\_gascoigne@somer.org.uk

## The Trust's new business plan

This year's business plan is attached. It has been designed specifically to prepare the way for the next 10 years by:

- Concentrating on getting all our services in line with what our customers tell us they want, with the measurement of customer satisfaction a priority and real investment in service improvement.
- Refreshing the way we manage our assets, using the expertise of Savills to work with us on creating a 10-year investment programme and a model allowing us to more deeply understand the financial performance of our stock, and better decision making about future strategic investment, particularly in the difficult economic environment.
- Ensuring that our asset management takes account of our 15 'Better Places' neighbourhoods so that we can share our data with other partners to make best use of resources and complement their activity, in line with what residents have told us they want to see happen.
- Developing a sustainable model of service delivery for older people, which is our largest group of customers, to complement the 2007 report from the Institute of Public Care, and the work on financial and stock analysis underway in 2009 as part of the work on asset management.
- Focusing the development of new homes where the Trust feels we can best deliver quality services to residents and communities within the core geographical area of Bath and North East Somerset, the West of England and West Wiltshire areas.

This is the first time the Trust has published its business plan. I welcome any comments you have about the plan and any suggestions you might have for changes in the future. I hope that you enjoy it.

Angela Gascoigne  
Managing Director  
angela\_gascoigne@somer.org.uk

## Managing our assets into the future

Following on from the first 10 years of investment in the Trust's homes, Savills has been commissioned to carry out a survey and review of the stock in order to help us plan for the next 30 years of investment.

The commission includes:

- a condition survey of the stock;
- development of an asset management model;
- development of an asset strategy and investment plan; and
- a review of our in house repairs and maintenance service.

In addition, Savills will be assisting the Trust in reviewing and developing our future sheltered and supported housing strategy. Initial surveys are now completed, with more detailed reporting programmed for the end of 2009.

Chris Franks  
Assistant Director (Asset Management)  
chris\_franks@somer.org.uk

## Community notice boards



At a recent Trust/B&NES liaison meeting, councillors requested details of the location of Trust-funded community notice boards and who to contact when wanting to use them for information.

There are currently three community notice boards, funded through the Trust's Neighbourhood Impact Grant. These are shown below together with the resident keyholders:

- Durnhill, Compton Dando (Richard East)
- Bilbie Lane, Chew Stoke (Alison Kilgallon)
- Woodcroft, Bishop Sutton (Ann Saunders).

This year, the Trust is funding a further three community notice boards. Two will be located in Mountain Wood, Bathford and Walton Close, Keynsham. The third has yet to be allocated.

Should anyone wish to place information on the notice boards, please contact the Trust's Resident Involvement Officer, Jo James on 01225 366147 or email [jo\\_james@somer.org.uk](mailto:jo_james@somer.org.uk). Jo will inform the resident keyholders who will then make contact with you.

Julie Evans  
Director of Customer Services (Housing & Support)  
[julie\\_evans@somer.org.uk](mailto:julie_evans@somer.org.uk)

## Letting Trust properties



As part of its transfer promises, the Trust promised that its lettings policies would be similar to Bath and North East Somerset Council's existing policy. Priority would be given to local people in greatest housing need and the Trust would help the council by rehousing homeless families.

This promise reflects the Trust's regulatory obligation to:

*'work with local authorities to enable the latter to fulfil their duties to the homeless and people in priority housing need.'*

Ten years later, the Trust is still keeping its promise when allocating its homes. We work in partnership with the council, assisting them to house people in need through their choice-based lettings system, Homesearch. Last year, Trust and Council officers reviewed and agreed a revised Homesearch Partnership Agreement. Through this, we agree to offer annually 75% of our vacant homes to people registered on the Homesearch register, including priority homeless families. The remaining 25% is allocated to tenants registered on the Trust's own transfer register.

Last year, the Trust also reviewed its allocation policy and procedure to ensure that it was properly aligned to the council's choice-based lettings policy, and reflected the council's priorities. Changes have been made to ensure that this is the case, including the allocation of properties using the same family size criteria, and local lettings criteria for homes in rural villages of 3,000 population or less. If you would like a copy of the allocations policy, please contact us.

Allocating and letting properties is a major part of the Trust's work every year. Shown opposite is the lettings activity of the Trust in 2008-09.

565 homes were let in the B&NES area; 426 (75.4%) were let through Homesearch. Nine out of 10 people housed by the Trust last year in B&NES already lived in the area.

Last year, the Trust started to experience a problem letting its sheltered homes for older people. The main reason for this was the lack of bids for its sheltered

Total lettings 2008/09	
Re-lets – general needs	362
Re-lets – sheltered	161
<b>Re-lets – total</b>	<b>523</b>
New lets	155
<b>TOTAL</b>	<b>678</b>
Ave. letting time	3.70 wks
Ave. re-letting time	4.63 wks
Ave. sheltered	5.91 wks
Ave. general needs	3.01 wks
Lettings by application type	
B&NES nominations	426 (63%)
Internal transfer	93
Direct let	8
Permanent decant	26
Succession	7
Direct referral	6
No. statutory homeless nominations housed	96 (14%)
BME lettings (where this is disclosed)	32 (5%)

housing, which impacted upon the average letting time as a result. There are currently approximately 680 people registered with Homesearch for older persons' housing. Very few of them bid for properties last year. Where bids were made, a higher percentage of refusals were also seen. The Trust and council are working to understand the reasons for this lack of demand and agree solutions for increasing the number of people bidding for sheltered properties.

We understand that councillors have concerns regarding the criteria we use when allocating rural properties to existing tenants through the Trust's transfer policy. These concerns centre on the experience of local people living in communities, who are unable to secure a home as they seem to be allocated to people with little or no local connection. We intend to review our local connection criteria when we review our transfer policy later this year to make sure those concerns are considered and taken into account where possible.

**Julie Evans**  
 Director of Customer Services (Housing & Support)  
[julie\\_evans@somer.org.uk](mailto:julie_evans@somer.org.uk)

# The Trust's development pipeline

NBH = New Build HomeBuy, RTHB = Rent-to-HomeBuy, NB = new build, Eco Homes / Code for sustainable homes = measure of environmental performance.

Scheme	LA	Tenure	No. of Homes	Sustainability	Type	Completion expected
Amberley Close and Lulworth Road, Keynsham (PRC project)	B&NES	GN	43	Code for sustainable homes level 3	NB	2010/11
		NBH/RTHB	11			
Ashlands, Portishead	North Somerset	GN	3	Eco Homes very good	NB	March 2010
Berkeley Gardens, Keynsham	B&NES	GN	2	Code for sustainable homes level 4	NB	Early 2010
Bryants Avenue, Radstock	B&NES	GN	27	Code for sustainable homes level 3	NB	2011/12
Dallas Road, Chippenham	Wiltshire	GN	6	Code for sustainable homes level 3	NB	Autumn 2010
Davids Road, Whitchurch	Bristol	GN	39	Code for sustainable homes level 3	NB	December 2009 – May 2010
		Intermediate rent	6			
		NBH/RTHB	11			
Day Crescent / Pennyquick View, Twerton (PRC project)	B&NES	GN	45	Code for sustainable homes level 3	NB	2011/12
		NBH/RTHB	11			
Holcombe Green, Weston (PRC project)	B&NES	GN	44	Code for sustainable homes level 3	NB	2011/12
Lintham Drive, Kingswood, further phases	South Glos	GN	6	Code for sustainable homes level 3	NB	September – December 2009
		NBH	6			
Meridian, Bristol	Bristol	GN	36	Eco Homes very good	NB	2012
		NBH	10			
Polestar Purnell, Paulton further phases	B&NES	GN	13	Eco Homes good	NB	November 2009 – 2010
		NBH	3			
Riverside Yard, Radstock	B&NES	GN	10	Code for sustainable homes level 3	NB	2010/11

Scheme	LA	Tenure	No. of Homes	Sustainability	Type	Completion expected
Southgate, Bath	B&NES	GN	16	Eco Homes very good	NB	Summer 2010
		NBH	9			
Southlands, Weston (PRC project)	B&NES	GN	60	Code for sustainable homes level 3	NB	2012/13
		NBH/RTHB	16			
Temple Cloud, garage site	B&NES	GN	7	Code for sustainable homes level 4	NB	Early 2010
The Lawns, Stoke Gifford	South Glos	GN	42	Eco Homes very good	NB	First phases summer 2009
		Intermediate rent	16			
		NBH/RTHB	14			
Tyning Road, Peasedown St John	B&NES	GN	8	Code for sustainable homes level 3	NB	2010/11
Ushers Brewery, Trowbridge further phases	Wiltshire	GN	18	Eco Homes very good	NB	Spring/summer 2010

## Open day for councillors

Our next event for councillors will be on **Monday, 2nd November from 2–8pm**. It's your chance to find out the latest news on the Trust's projects and ongoing work. It is also a good opportunity to meet our staff and raise any questions or concerns you may have.

For more details, contact Sue Sutton on 01225 366072.



### Somer Community Housing Trust

The Maltings, River Place, Lower Bristol Road, Bath, BA2 1EP

Tel: 01225 366000

Email: [enquiries@somer.org.uk](mailto:enquiries@somer.org.uk)

Web: [www.somer.org.uk](http://www.somer.org.uk)