



# COMMUNITY OVERVIEW AND SCRUTINY COMMITTEE

## *Committee Report*

**Public**

**Date of Meeting:** 29th July 2008

**Title:** Carlisle Housing Association – Partnership Agreement Action Plan

**Report of:** Director of Development Services

**Report reference:** DS.91/08

### **Summary:**

The purpose of this report is to update Members of the community Overview and scrutiny Committee with Action Plan details within the Partnership Agreement with between Carlisle City Council and Carlisle housing Association.

### **Questions for / input required from Scrutiny:**

Questions relating to the details of the Partnership Agreement Action Plan.

### **Recommendations:**

It is recommended that Members consider the report

**C Elliot**  
Director of Development Services

**Contact Officer:** Simon Taylor

**Ext:** 7327

Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers: None

## BACKGROUND

- 1.0 For the first five years following the transfer of housing stock from Carlisle City Council to Carlisle Housing Association (CHA) in 2002, the performance of CHA was reported on a regular basis to Community Overview and Scrutiny committee.
- 2.0 In order to put in place a process for continuing the work carried out in partnership between the two organisations a report was brought to Community Overview and Scrutiny on 22/11/07 on progress being made on developing a Partnership Agreement. That Committee (COS.140/07) asked that the chair and vice chair be involved in developing the final document prior to it coming back to the committee. This was done and the final document was brought back on 14/2/08 (DS 17/08). The Partnership Agreement document was an overall document identifying the principles behind the agreement and the main areas of work which would be expanded into an action plan at a later date. The Committee identified (COS. 38/08) that it would like to see the action plan once it had been developed and have half yearly opportunities to monitor the agreement.
- 3.0 Further to the input from Community Overview and scrutiny the Partnership Agreement was taken to Executive on 17/3/08. The Partnership Agreement is attached as Appendix one.
- 4.0 The Action Plan was developed in May and taken to the Joint Management team on 22/5/08. This is attached as Appendix two. The actions have been developed under the areas identified in the Partnership Agreement and cover the following areas;
  - Community Investment Fund
  - Neighbourhood/Ward Walks
  - Respect Agenda/Anti Social Behaviour
  - Raffles Vision
  - Neighbourhood Plans
  - Aids and adaptations
  - Supporting People
  - Vulnerable Persons
  - Choice Based Lettings
  - Homelessness/Nominations Agreement
  - Affordable/Social Housing Provision
  - Mortgage Rescue
  - Housing Benefit
  - Housing Strategy and Decent Homes
  - The Environment
- 5.0 Progress on actions under the agreement will be monitored through quarterly officer meetings with the Portfolio Holder and a CHA Board Member attending one of the meetings on a regular basis throughout the year. Monitoring reports will also be brought to Community Overview and Scrutiny committee as requested on a 6 monthly basis.



**Partnership Agreement  
Between  
Carlisle Housing Association and Carlisle City Council**



**1. Background to this agreement**

This partnership agreement has been developed to recognise the long-term relationship that is essential to the future prosperity of both organisations and the people and communities we serve. It provides a framework for the partnership that is based on best practice for the joint relationship between a Large Scale Voluntary Transfer (LSVT) and its authority to deliver on their own objectives Carlisle Housing Association and Carlisle City Council recognise the importance of each other. In particular:

- CHA and Carlisle City Council have compatible strategic objectives
- Successful service delivery will, in many instances, be dependent on effective joint working
- A positive external profile is important to both organisations

This is not a static document – both organisations commit to review it on a regular basis. This agreement is not intended to create a legal relationship between parties or change the existing contractual arrangements between Carlisle Housing Association and Carlisle City Council but is more of a best practice approach to partnership working to best serve each other and the communities in which we work.

### 2. Commitments to the partnership

Both parties have agreed to make the following contributions to the partnership:

2.1 Developing and maintaining a good understanding of the needs of individuals, communities and neighbourhoods – this will be achieved through:

- Effective joint working with policy and service and strategy development
- Collaboration on research projects
- Sharing the results of the research for service and strategy development

2.2 Collaboration on the development of strategic objectives – this will be achieved through:

- Co-ordinating the timing of business/service planning
- Collaboration on gaps and needs
- Highlighting the critical objectives that must be pursued in partnership

2.3 Aligning resources to deliver maximum impact to communities and ensure value for money – this will be achieved through:

- Contributing to the best value reviews, particularly in areas of service cross over
- Joint consideration of resource investment needs for new homes and improved quality and adaptability of homes in the Carlisle and District area
- The agreement identifies areas of working and commits each organisation to joint working. Any financial commitment in regard to any initiative or area of work under this agreement will need to be approved through each organisation accordingly

2.4 Developing standards and common ways of working to ensure seamless delivery of services – this will be achieved through:

- Identifying standards of service delivery, for example Housing options, Homelessness and Housing Advice
- Identifying and participation in joint training and development exercises, for example, prevention of homelessness, crime prevention, and communicating with hard to reach groups
- Further to actions being undertaken under the agreed areas of work, outcomes and targets need to be identified. Once delivered these need to be reviewed.

2.5 Continued adherence to the Information Exchange Protocol, including the process for Members to engage with CHA (shown as *Appendix 1*)

### 3. Delivery of 'Promises'

- Any areas of work carried over the 5 year period outstanding will be delivered by CHA and monitored by Carlisle City Council
- Outstanding areas of work will be highlighted by CHA's '5 Years On' document

### 4. Evaluation and Review

Services delivered as part of service level agreements will be reviewed in accordance with the commitments in this document. A general review of this agreement will be carried out annually to ensure it:

- Reflects best practice in LSVT/local authority relationships
- Meets the needs of the Carlisle and District community
- Provides for efficient and effective management and running of both organisations
- Look at the effectiveness of the agreement

### 5. Review Meetings (see Information Exchange protocol at Appendix 1)

Strategic Liaison Meetings	6 monthly
Operational Meetings	Quarterly

It is anticipated that officers from each organisation will meet on a quarterly basis and that the chair of the CHA board (or nominee) and Portfolio holder from the Council (or nominee) would also attend the strategic meetings

Signed:.....

Date .....

Managing Director  
Carlisle Housing Association

Signed:.....

Date .....

Chief Executive  
Carlisle City Council

### **Carlisle Housing Association and Carlisle City Council Partnership Agreement**

<b>Key Areas</b>	<b>Specific / Ongoing Requirements of Each Organisation</b>
<b>Community Development and Estate Management</b>	
Community Investment Fund (CIF)	<ul style="list-style-type: none"> <li>• Funding for the CIF scheme provided by CHA in years 1-5 post transfer to be continued into 2008 / 2009.</li> <li>• Carlisle City Council to nominate a representative to participate in the CIF approval / appraisal panel process.</li> </ul>
Neighbourhood / Ward Walks (inspections)	<ul style="list-style-type: none"> <li>• Neighbourhood walks currently being carried out by CHA and Ward walks being carried out by Carlisle City Council.</li> <li>• Both organisations to commit to invite representation from partner organisation for both schemes from 2008 onwards.</li> </ul>
Respect Agenda / Anti Social Behaviour	<ul style="list-style-type: none"> <li>• Both organisations to commit to work in partnership on a number of initiatives in relation to the reduction of anti social behaviour in the district. Initiatives include the development of the anti social behaviour unit and the multi agency partnership.</li> <li>• CHA and Carlisle City Council to support the crime and disorder reduction partnership through membership of the task groups and involvement in development and delivery of partnership projects to reduce crime and anti social behaviour on CHA estates.</li> <li>• CHA to continue to provide information to Carlisle City Council in relation to progress of the delivery of estate management and tenancy enforcement services.</li> </ul>

## Appendix 1

Raffles Vision	<ul style="list-style-type: none"> <li>To continue to work in partnership in relation to the progression of initiatives associated with the Raffles Vision.</li> </ul>
Neighbourhood plans	<ul style="list-style-type: none"> <li>Carlisle City Council to support the development of new neighbourhood initiatives at CHA including the provision of appropriate demographic data to support the revision of neighbourhood plans.</li> </ul>
<b>Supporting Vulnerable People</b>	
Aids and adaptations	<ul style="list-style-type: none"> <li>Both organisations to commit to review the facilitation of aids and adaptations for CHA tenants after 2008, in order to streamline the process and ensure best practice is delivered for service users.</li> </ul>
Supporting people	<ul style="list-style-type: none"> <li>Carlisle City Council to work in partnership with CHA regarding any bids that may be made required for developing supported housing services.</li> </ul>
Vulnerable persons	<ul style="list-style-type: none"> <li>Carlisle City Council to support CHA in the provision of information in relation to the development of a strategy for older people, young persons and other vulnerable groups.</li> <li>Both organisations to commit to review all possible access solutions to enable the most vulnerable applicants with specific needs, or disabilities to be provided with housing solutions.</li> </ul>



<b>Choice Based Lettings/ Homelessness</b>	
Choice Based Lettings (CBL)	<ul style="list-style-type: none"> <li>Both organisations (alongside other local authority and Housing Association partners) to support the review of the recent failed Cumbria bid to the CLG (Communities &amp; Local Government) for funding to implement an effective CBL system within the sub region.</li> </ul>
Homelessness / nominations Agreement	<ul style="list-style-type: none"> <li>Both organisations to conduct an annual review of the effectiveness of the agreements currently in place and ensure regular dialogue takes place between relevant officers from each organisation regarding joint protocols.</li> <li>CHA to ensure that Carlisle City Council homelessness prevention work is supported through relevant procedures such as appropriate information sharing, arrears recovery and debt advice.</li> </ul>

<b>Development / Buy Backs</b>	
Affordable / social housing provision	<ul style="list-style-type: none"> <li>• Both organisations to agree to work in partnership in relation to the development and delivery of proposals for new build homes, housing corporation bids and meeting housing need in accordance with the district survey to meet housing market assessments 2006-11.</li> <li>• Where planning issues may exist, both organisations to agree to ensure effective dialogue takes place, so as not to hinder the progress of the timely delivery of schemes in order to meet housing need requirements.</li> </ul>
Mortgage Rescue	<ul style="list-style-type: none"> <li>• Both organisations to work towards developing a pilot for a mortgage rescue scheme in 2008/9</li> </ul>
<b>Income Maximisation</b>	
Housing Benefit	<ul style="list-style-type: none"> <li>• Carlisle City Council to commit to work with CHA in order to achieve a service level agreement for the effective delivery of housing benefit applications, in order to ensure housing debt is kept to a minimum.</li> </ul>

<b>Buildings and the Environment</b>	
Housing strategy and decent homes	<ul style="list-style-type: none"> <li>• CHA to support Carlisle City Council on taking a leading role on initiatives in relation to both the Carlisle Housing Strategy and the Homelessness Strategy.</li> <li>• Both organisations agree to share information and expertise in supporting the initiative of providing decent, affordable homes with an emphasis on warmth and thermal efficiency and eliminating fuel poverty.</li> </ul>
The environment	<ul style="list-style-type: none"> <li>• Both organisations to agree to work collaboratively both through open dialogue and through existing neighbourhood forum meetings with the aim of improving the environment, recreation facilities and open spaces in neighbourhoods where there are issues of shared concern.</li> <li>• Both organisations to commit to working together in order to come up with a range of solutions to ensure there is a better control of fly tipping on estates and to meet the requirements of effective household waste disposal in accordance with new recycling laws.</li> </ul>
<b>Information Sharing and Partnership Development</b>	
Promoting partnership working	<ul style="list-style-type: none"> <li>• Each organisation to agree to be supportive of opportunities which arise to promote partnership working through joint media ventures and initiatives.</li> <li>• Both organisations to commit to reviewing specific actions which arise from this document through the proposed regular strategic liaison meetings.</li> </ul>

## Draft partnership agreement action plan

Community Investment Fund (CIF)	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Funding for the CIF scheme provided by CHA in years 1-5 post transfer to be continued into 2008 / 2009.</li> <li>Carlisle City Council to nominate a representative to participate in the CIF approval / appraisal panel process.</li> </ul>	1. CHA to review current CIF procedure and undertake an impact assessment and set up a new procedure for future CIF funding. CHA to consult with Carlisle CC on targets, outcomes and mechanisms.	HOGD HSM	1 <sup>st</sup> September 2008
	2. Carlisle CC to commit appropriate representation on future approval procedures.	HSM	Ongoing
	3. External funding officer to agree to meet nominated CHA officer on a quarterly basis / as required.	EFO NRO	1 <sup>st</sup> September 2008

Neighbourhood / Ward Walks (inspections)	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Neighbourhood walks currently being carried out by CHA and Ward walks being carried out by Carlisle City Council.</li> <li>Both organizations to commit to invite representation from partner organization for both schemes from 2008 onwards.</li> </ul>	<ol style="list-style-type: none"> <li>1. Agree the overall programme of patch walks / ward walks jointly, where possible undertake patch walks as part of the overall ward walks. Ensure that communication with tenants &amp; ward members takes place as part of this process.</li> <li>2. Set up a system to enable combined diarying ahead of inspections with scope for both joint / specific actions, with responsibilities defined – named individuals.</li> <li>3. Set up a consistent process/recordings method for both patch/ward walks, where possible including shared performance indicators.</li> <li>4. The outcome of patch walks and ward walks to be communicated to key named individuals in both organizations with a joint format for informing people about outcomes.</li> <li>5. Agree any joint promotional procedure for inspections and ensure relevant information or data is shared as appropriate.</li> </ol>	<div>HOO</div> <div>HOES</div>	1 <sup>st</sup> September 2008

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Respect Agenda / Anti Social Behavior	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Both organizations to commit to work in partnership on a number of initiatives in relation to the reduction of anti social behaviour in the district. Initiatives include the development of the anti social behaviour unit and the multi agency partnership.</li> <li>CHA and Carlisle CC to support the crime and disorder reduction partnership through membership of the task groups and involvement in development and delivery of partnership projects to reduce crime and anti social behaviour on CHA estates.</li> <li>CHA to continue to provide information to Carlisle CC in relation to progress of the delivery of estate management and tenancy enforcement services.</li> </ul>	1. CHA and Carlisle CC to promote joint approach to Botcherby regeneration and subsequently to agree to any joint funding bids in relation to ASB related issues on Botcherby.	HOGD TBA	Ongoing
	2. Both organizations to commit to involvement in CDRP, the ASB unit and in MAPPA.	HOO / TSM HSM	Ongoing
	3. CHA agree to provide Carlisle CC with PI's in relation to ASB if required.	HOO HSM	If required

Raffles Vision	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>To continue to work in partnership in relation to the progression of initiatives associated with the Raffles Vision.</li> </ul>	1. CHA to provide letter of support to Carlisle CC for DH funding bid.	HOGD HEO	May 1 <sup>st</sup> 2008
	2. Carlisle CC provide update report to CHA on Raffles progress, providing information on any future recommendations by 1 <sup>st</sup> Sept 08.	HEO HOGD	September 1 <sup>st</sup> 2008
	3. CHA to provide Carlisle CC with information (if required) regarding progress leading to achievement of 100% decent homes by April 2010.	HOGD	Ongoing



Neighbourhood Plans	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Carlisle CC to support the development of new neighbourhood initiatives at CHA including the provision of appropriate demographic data to support the revision of neighbourhood plans.</li> </ul>	<ol style="list-style-type: none"> <li>CHA producing neighborhood plans between 2008 -2014 Carlisle CC to support process, by providing data and information when required and CHA to involve Carlisle CC in the consultation process.</li> </ol>	HOGD HEO	Ongoing
	<ol style="list-style-type: none"> <li>CHA to ensure that the data from the patch walk process to be included in the neighbourhood plans.</li> </ol>	HOGD	Ongoing

Aids and Adaptations	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Both organizations to commit to review the facilitation of aids and adaptations for CHA tenants after 2008, in order to streamline the process and ensure best practice is delivered for service users.</li> </ul>	1. CHA to review current budget commitment to aids and adaptations and to consult with Carlisle CC regarding the outcome.	ALM	September 1 <sup>st</sup> 2008
	2. Both organizations to commit to meet to agree a new proposal.	HSM	September 1 <sup>st</sup> 2008
	3. Both organizations commit to adopting new process.	HSM	April 1 <sup>st</sup> 2009
		HOO / ALM	

Supporting People	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Carlisle CC to work in partnership with CHA regarding any bids that may be required for developing supported housing services.</li> </ul>	<p>Carlisle CC and CHA agree to ensure they keep each partner informed about forthcoming developments in relation to supported housing services</p>	<p>HSM HOO / ALM</p>	<p>Ongoing</p>

Vulnerable Persons	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Carlisle CC to support CHA in the provision of information in relation to the development of a strategy for older people, young persons and other vulnerable groups.</li> <li>Both organizations to commit to review all possible access solutions to enable the most vulnerable applicants with specific needs, or disabilities to be provided with housing solutions</li> </ul>	1. CHA to consider holding a register of adapted properties	HOGD	September 1 <sup>st</sup> 2008
	2. Carlisle CC and CHA to develop a procedure for dealing with applicants with complex needs.	HHM HOO / TSM	July 1 <sup>st</sup> 2008
	3. CHA and Carlisle CC to commit to work in partnership to review design options for future developments. CHA provide Carlisle CC with a detailed investment plan on housing for older persons.	HOGD HEO	Ongoing & before April 1 <sup>st</sup> 2010
	4. CHA needs to consult with Carlisle CC in relation to the development of strategies relating to vulnerable persons	HOGD HEO	Ongoing

Choice Based Lettings (CBL)	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Both organizations (alongside other local authority and Housing Association partners) to support the review of the recent failed Cumbria bid to the CLG for funding to implement an effective CBL system within the sub-region.</li> </ul>	<ol style="list-style-type: none"> <li>CHA and Carlisle CC agree a strategic joint approach to supporting proposed (2nd) sub regional bid for CBL.</li> <li>Carlisle CC and CHA to review options to ensure arrangements in place from Oct 2008 if bid not successful (policy must be in place by 2010).</li> </ol>	HOO / TSM HSM  HSM HOO / TSM	October 1 <sup>st</sup> 2008  October 1 <sup>st</sup> 2008

Homelessness / Nominations Agreement	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Both organizations to conduct an annual review of the effectiveness of the agreements currently in place and ensure regular dialogue takes place between relevant officers from each organization regarding joint protocols.</li> <li>CHA to ensure that Carlisle City Council homelessness prevention work is supported through relevant procedures such as appropriate information sharing arrears recovery and debt advice.</li> </ul>	<ol style="list-style-type: none"> <li>1. Carlisle CC and CHA to meet to agree new procedure for homelessness referrals.</li> <li>2. CHA will provide a strategy / action plan in relation to homelessness to support Carlisle CC strategy.</li> </ol>	<div>HHM HOO / TSM</div> <div>HHM HOO / TSM</div>	<div>July 1<sup>st</sup> 2008</div> <div>July 1<sup>st</sup> 2008</div>

Affordable / social housing provision	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Both organizations to agree to work in partnership in relation to the development and delivery of proposals for new build homes, housing corporation bids and meeting housing need in accordance with the district survey to meet housing market assessments 2006-11.</li> <li>Where planning issues may exist, both organizations to agree to ensure effective dialogue takes place, so as not to hinder the progress of the timely delivery of schemes in order to meet housing need requirements.</li> </ul>	1. CHA to provide a list of potential schemes for new development through housing corporation RME.	HOGD	September 1 <sup>st</sup> 2008
	2. Carlisle CC to arrange joint meeting with Housing Corporation.	HEO	
	3. CHA to arrange regular meeting with other land holders and Carlisle CC (housing and planning).	HEO	July 1 <sup>st</sup> 2008
	4. CHA to arrange regular liaison meetings with Carlisle CC and other partners (inc. Adult Social Care) in relation to CHA sheltered housing redevelopment project & to keep Carlisle CC informed of progress on redevelopment plans.	HOGD	April 2008 onwards
	5. CHA to attend future community overview and scrutiny committee to consult regarding the CHA Asset Management strategy, development strategy and older person strategy.	HOGD	Ongoing and up to April 2010
	6. Carlisle CC and CHA to develop a joint move on accommodation strategy.	HOGD HOO	July 2008
	7. Carlisle CC to support CHA on possible social home buy bid to Housing Corporation.	HHM	December 1 <sup>st</sup> 2008
		HOGD HEO	April 1 <sup>st</sup> 2009

Mortgage Rescue	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Both organizations to work towards developing a pilot for a mortgage rescue scheme in 2008/9</li> </ul>	1. CHA to draft criteria for eligible persons, set up procedure and tenure numbering and liaise with Carlisle CC and Cumberland B S.	HOGD HSM	July 1 <sup>st</sup> 2008
	2. All funding options to be reviewed	HSM	
	3. CHA to gain approval to above process (Board/SMT)	HOGD HOGD	September 1 <sup>st</sup> 2008
	4. CHA to agree lease with Cumberland B. S for shared equity option.	HOGD	June 1 <sup>st</sup> 2008



Housing Benefit	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Carlisle CC to commit to work with CHA in order to achieve a service level agreement for the effective delivery of housing benefit applications, in order to ensure housing debt is kept to a minimum.</li> </ul>	I. CHA and Carlisle CC to review and update existing SLA which is now several years old.	HOO HBM	1 <sup>st</sup> September 2008



The Environment	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Both organizations to agree to work collaboratively both through open dialogue and through existing neighbourhood forum meetings where the aim will be to improve the environment, recreation facilities and open spaces in neighbourhoods where there are issues of shared concern.</li> <li>Both organizations to commit to working together in order to come up with a range of solutions to ensure there is a better control of fly tipping on estates and to meet the requirements of effective household waste disposal in accordance with new recycling laws.</li> </ul>	<p>1. CHA to develop an action plan which identifies environmental issues for Botcherby, to be used as a template to be rolled out to other estates by April 09, to consult with Carlisle CC as part of the Botcherby regeneration process and feed in the outcomes of patch/ward walks into process.</p>	<p>HOGD TBA</p>	<p>Ongoing</p>
	<p>2. Both organizations will continue to contribute to neighborhood forum process as required</p>	<p>Various Various</p>	<p>As required</p>

Promoting Partnership Working	Tasks	Persons Responsible	Completion Date
<ul style="list-style-type: none"> <li>Each organisation to agree to be supportive of opportunities which arise to promote partnership working through joint media ventures and initiatives.</li> <li>Both organisations to commit to reviewing specific actions which arise from this document through the proposed regular strategic liaison meetings.</li> </ul>	1. To agree dates and more detailed protocols for appropriate Officers, Councilors and Board members to attend future review meetings – 12 months ahead.	HOO HSM	September 1 <sup>st</sup> 2008
	2. Appropriate officers attending these meetings to review/ monitor progress on partnership action plan.	HOO HSM	Ongoing
	3. CHA and Carlisle CC Marketing. Officers to meet and provide a joint statement / action plan regarding future joint media venture/initiatives.	CM CME	September 1 <sup>st</sup> 2008

## Job titles

### CHA

HOGD Head of Growth & Development  
 HOO Head of Operations  
 NRO Neighbourhood Regeneration Officer  
 TSM Tenancy services Manager  
 ALM Assisted Living Manager  
 CME Communications & Marketing Executive

### Carlisle CC

HSM Housing services Manager  
 HOES Head of Environmental Services  
 HEO Housing Enabling Officer  
 HHM Housing & Hostels Manager  
 HBM Housing Benefits Manager  
 CM Communications Manager  
 TBA post to be arranged