



RUNNYMEDE BOROUGH COUNCIL

HOUSING AND COMMUNITY SERVICES COMMITTEE

12 NOVEMBER 2003

APPENDICES

<u>APPENDIX</u>	<u>REPORT</u>	<u>PAGE. NO.</u>
A	GRANT AID PROGRAMME 2004/05 – 2008/09	1
B	RUNNYMEDE RENTSTART – PROPOSED SERVICE LEVEL AGREEMENT	2
C	RELATE WEST SURREY – PROPOSED SERVICE LEVEL AGREEMENT	6
D	VOLUNTARY AND COMMUNITY SECTOR INFRASTRUCTURE – GOVERNMENT CONSULTATION QUESTIONNAIRE	10
E	RUNNYMEDE AND SPELTHORNE HOMELESSNESS TASK GROUP – DRAFT TERMS OF REFERENCE	14
F	AFFORDABLE HOUSING PROGRAMME – PROGRESS REPORT	15
G	PROPOSED CHANGES TO PLANNING POLICY GUIDANCE NOTE 3 - HOUSING - REPORT TO PLANNING COMMITTEE OF 15 OCTOBER 2003	19
H	BEST VALUE PERFORMANCE INDICATORS – OUTTURN FOR APRIL TO JUNE 2003	25
I	CONCESSIONARY BUS FARES SCHEME – DRAFT HEADS OF TERMS	27
J	FINANCIAL MONITORING STATEMENTS	37

Grant Aid Programme for Housing and Community Services 2003/04 – 2008/09									
Organisation	Renewal of funding application due	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09		
		£	£	£	£	£	£	£	£
Age Concern Runnymede	2005/06	90,633	93,352	96,153	99,037	102,008	105,068		
CAB Runnymede	2005/06	62,000	63,550	65,139	66,767	68,436	70,147		
Disability Advice in Runnymede and Spelthorne (DAIRS)	2009/10	6,050	7,500	7,688	7,880	8,077	8,279		
Runnymede Association for Voluntary Services (RAVS)	To be agreed	21,000	21,525	22,063	22,615	23,180	23,760		
Relate West Surrey	To be agreed	5,540	5,679	5,820	5,966	6,115	6,268		
Rentstart	To be agreed	7,950	8,149	8,352	8,561	8,775	8,995		
Runnymede Care Assistant Scheme	Annual	12,300	12,600	12,915	13,238	13,569	13,908		
Runnymede Community Forums	To be agreed	1,000	1,025	1,051	1,077	1,104	1,131		
Runnymede Mental Health Association	Annual								
Strategic Maintenance Programme		21,800	14,400	14,500	21,500	14,800	15,000		
Rent Grant Aid		3,650	3,650	3,650	3,650	3,650	3,650		
General Grant		2,950	3,050	3,126	3,204	3,285	3,367		
Surrey Community Development Unit	To be agreed	700	718	735	754	773	792		
Surrey Law Centre	2006/07	2,500	2,563	2,627	2,692	2,760	2,829		
TOTALS		238,073	237,759	243,819	256,941	256,531	263,193		

Note: Assumed inflation rate for grant increases is 2.50%
 For Age Concern (based on level of national pay awards) 3.00%

SERVICE LEVEL AGREEMENT
BETWEEN RUNNYMEDE BOROUGH COUNCIL (RBC) AND
RUNNYMEDE RENTSTART (RENTSTART)

1. **Services**

- 1.1 Runnymede Rentstart will provide assistance with finding privately rented accommodation and a rent deposit scheme for single people or couples (without dependent children), aged 18 years or over, on a low income and with a local connection with Runnymede.
- 1.2 Rentstart will provide information to, and accept referrals from, a wide range of statutory and voluntary agencies including the CAB, RBC, Community Mental Health Teams, Probation and Social Services. Clients can also apply to the scheme directly.
- 1.3 The Rentstart Manager will interview new clients and give advice and assistance to secure private rented accommodation. Eligible clients may be provided with a deposit bond to help secure suitable accommodation.
- 1.4 Rentstart will promote the scheme to, and recruit, local landlords and letting agencies to maximise opportunities for clients to access privately rented accommodation.
- 1.5 Rentstart will maintain a database of clients referred to the scheme, clients assisted and outcomes and a record of all bonds issued, their expiry and any claims made against them.
- 1.6 Criteria for client eligibility and the circumstances where a rent deposit may be provided are shown in Appendix 1.

2. **Period**

- 2.1 This agreement will cover the five financial years 2004/5, 2005/6, 2006/7, 2007/8 & 2008/9.
- 2.2 The financial year runs from 1st April to 31st March.

3. **Opening Hours**

- 3.1 There are no set opening hours when the project will be open to callers, applicants, referral agencies or landlords.
- 3.2 Rentstart will provide a telephone answerphone service between 10.00 am – 4.00 pm Monday to Friday (except on public holidays). Telephone calls will normally be answered on the same or the next working day. When the RentStart Manager is absent on leave volunteers will respond to answerphone messages within the same timescale and advise clients of this situation.
- 3.3 Rentstart staff are employed for 27 hours per week and during this time will see clients by appointment & answer telephone enquiries directly where possible.
- 3.4 The Rentstart offices are accessible to clients by appointment only.

4. **Grant Guarantee**

- 4.1 RBC will pay an annual base grant in each of the five financial years of £8,150 by no later than the 30th April of each year.

Inflation

- 4.2 The grant for 2005/06 onwards will be uplifted each year by the Retail Price Index.
- 4.3 If the agreed sum is not available or will be reduced, six months notice will be given for Rentstart to make alternative provision or terminate the Agreement as necessary.
- 4.4. From time to time and where opportunities arise, RBC may make additional funds available to Rentstart. Where approved, these funds may be provided for specific purposes and may be subject to certain criteria and restrictions as are agreed at the time.

5. **Quality of service**

- 5.1 Rentstart staff will undertake training around housing and homelessness law and other training considered necessary by the Management Committee.
- 5.2 Rentstart will operate a procedure for representations and complaints about the service and shall take all reasonable steps to bring this to the attention of their service users.
- 5.3 The number and type of complaints will be reported to every Rentstart Management Committee meeting.
- 5.4 Any serious complaints in connection with the service being provided under this agreement shall be reported to the Council immediately.

6. **Monitoring Arrangements**

Liaison with RBC

- 6.1 A meeting will be held annually between both parties to review the Service Level Agreement.
- 6.2 Six monthly meetings will also be held between these parties to monitor the operation of the Service Level Agreement and consider any new issues that may impact on the agreement or on the services delivered by Rentstart or RBC.

Performance Indicators

- 6.3 Rentstart will provide the Council with copies of the annual report, which will include the following statistics for the financial year:

Number of referrals received;
Number of clients assisted to secure private rented accommodation;
Number of deposit bonds issued;
Numbers of clients by referral source

Local connection profile of clients
Percentage of telephone calls returned within 2 working days
Percentage of written correspondence replied to within 5 working days

7. **Accounting Requirements**

- 7.1 A copy of Rentstart's Annual Report and Accounts, will be sent each year to the Director of Finance within nine months of the end of the financial year.
- 7.2 The Rentstart Management Committee will run the financial affairs of the charity, in accordance with the good practice guidelines of the Financial Services Agency (rules for Limited companies). In particular Rentstart will maintain a suitable level of balances, to meet its day to day needs and provide a reasonable contingency sum.

8. **Dispute Resolution**

- 8.1 Both parties will endeavour to resolve disputes in a fair and equitable manner in the spirit of this agreement.

9. **Legal Relations**

- 9.1 This Document is a statement of the arrangements that both parties intend to operate but is not intended to create legally enforceable obligations between the parties.

Signed on behalf of Rentstart _____

Position _____

Date _____

Signed on behalf of RBC _____

Position _____

Date _____

Rentstart SLA Appendix 1

Runnymede Rentstart Client Criteria

To be eligible for provision of a rent deposit bond, clients must:

1. Be homeless or threatened with homelessness or without settled accommodation;
2. Be single or a couple but must not have any dependant children living with them;
3. Have a local connection with Runnymede. (Clients shall be Runnymede residents or have strong family connections or employment in the Borough).
4. Be 18 years old or over;
5. Not be considered to be in priority need by RBC and entitled to rehousing from the council (within the meaning of Part VII of the Housing Act 1996). Runnymede Rentstart can assist clients who are entitled to rehousing from the council under the Homeless legislation where, by special circumstances, they would not benefit from such statutory rights.
6. Not have sufficient financial resources & income to provide a deposit themselves;
7. Be able to live independently and to accept responsibility for tenancy obligations including access to sufficient income or entitlement to benefits.

Additional criteria to be met prior to a deposit bond being issued

1. The proposed property must be in a reasonable state of repair and reasonably suitable for the prospective tenant. The property must have been inspected by the Rentstart Manager and assessed as being suitable in respect of basic health and safety (advice and assistance from the Private Sector Housing Team should be obtained if any concerns exist).
2. Valid certificates for gas appliances and electrical installations must be provided by the landlord/property owner.
3. The proposed rent for the property must have been assessed as affordable for the prospective tenant. Where the prospective tenant will be reliant on Housing Benefit, the proposed rent must have been assessed as reasonable for Housing Benefit purposes. Where it is not, the Rentstart Manager should look to renegotiate the rent with the landlord. Where this is not successful use of Discretionary Housing Payments should be explored. A small shortfall of less than £20.00 per week may be considered affordable if the client and Rentstart Manager are satisfied.

Additional criteria:

1. Deposit guarantees are provided to help secure accommodation for a client where failure to do so would mean that the accommodation would otherwise be unavailable. Consequently guarantees will not (generally) be considered where the client is already occupying the relevant property.
2. Deposit guarantees will normally be provided for a maximum period of six months. During this period clients are expected to make reasonable efforts to save sufficient funds to provide a deposit themselves. Only in exceptional circumstances will consideration be given to extending the guarantee period for a further six months.

SERVICE LEVEL AGREEMENT
BETWEEN RUNNYMEDE BOROUGH COUNCIL (RBC) AND
RELATE WEST SURREY

1. Services

Relate West Surrey will provide a confidential, impartial and independent couple counselling and psychosexual therapy service to the residents of the Borough of Runnymede. Services include family counselling and services for young people 11 – 21 years old.

2. Period

This agreement will cover the five financial years 2004/5 – 2008/9.

The financial year runs from 1st April to 31st March.

3. Opening Hours

Relate West Surrey will, subject to unforeseen circumstances, be open to residents of the Borough at the following centres for the number of sessions shown:

Provincial House, 26 Commercial Way, Woking

Monday – Friday 9am – 5pm
Saturday 9am – 12.30-pm

Open to personal callers to discuss appointments

Evening, Monday – Friday 6pm – 9pm

Other Counselling Centres

Ward Street, Guildford – all weekday evenings and Saturday mornings

CAB Centre, Farnham – Monday evenings

Staines Health Centre, Knowle Green – Saturday mornings and Thursday evenings

Haslemere Health Centre – Monday mornings

Holisitc Centre, Godalming – Tuesday afternoons

Cranleigh Health Centre - Monday evenings and Cranleigh Cottage Hospital
Saturday mornings
St Mary's Church, Thorpe - Tuesday

Harry Fletcher House, Esher - Monday, Tuesday and Wednesday all day,
Thursday afternoon and Saturday morning.

Weybridge Hospital - Thursday evenings

Counselling centres other than Woking is liable to change dependent upon
counsellor availability and client demand.

A session is 60 minutes for all counselling and therapy appointments.

4. Grant Guarantee

Runnymede Borough Council will pay an annual grant in each of the five
financial years of £5,700 by no later than the 30th April of each year.

The grant will be subject to annual adjustment for the following factor:

Inflation

The 2004/5 grant will be £5,700. The grant for the following 4 years will be
£5,700 adjusted by the movement in the Retail Price Index.

If the agreed sum is not available or will be reduced, 6 months notice will be
given for Relate West Surrey to make alternative provision or terminate the
agreement as necessary.

5. Quality of Service

Relate West Surrey will carry out an enquiry questionnaire to ascertain the
extent to which it is meeting its clients' needs. The format and scope of the
information to be sought from clients should be agreed with an authorised
representative of Runnymede Borough Council. A client evaluation exercise
should be carried out at least once a year, with a minimum coverage of 5% of
clients. The completed questionnaire should be analysed and the results
reported to the West Surrey Relate Management Committee and the
Community Partnership Officer, Runnymede Borough Council.

The annual grant will be conditional upon a satisfactory level of service being
achieved; measured by the achievement of a 90% satisfaction level.

Relate West Surrey will operate a procedure for representations and
complaints about the service, and shall take all reasonable steps to bring this
to the attention of their service users.

Any serious complaints shall be reported to Runnymede Borough Council
immediately.

A meeting will be held annually between both parties to review/monitor the Service Level Agreement.

Relate West Surrey will provide the Council with copies of the annual report. The statistics at appendix 3 will be provided on an annual basis at the beginning of the new financial year.

6. Accounting Requirements

The Relate West Surrey Trustees will run the financial affairs of the charitable company, in accordance with both the good practice guidelines and relevant statutory requirements. In particular Relate West Surrey will maintain a suitable level of balances to meet its day to day needs and provide a reasonable contingency sum.

A copy of Relate West Surrey's Annual Accounts, duly audited, must be sent to Runnymede Borough Council within four months of the end of the financial year.

Relate West Surrey will provide 3 copies of its Annual Report to Runnymede Borough Council.

7. Council Representation

The Borough Council will nominate a representative who will be invited to attend periodic Executive Committee and Management Committee meetings and receive all relevant management reports and accounts.

8. Accommodation

Relate West Surrey will provide suitable accommodation for their needs for the period of this agreement. Requirements for counselling accommodation are strictly monitored to meet Relate West Surrey criteria for security and confidentiality. Any significant issues affecting accommodation will be tabled at Relate West Surrey Executive Committee meetings at which Runnymede Borough Council is represented.

9. Literature and Local Promotions

Relate West Surrey agrees to recognise Runnymede Borough Council as a funding agency whenever possible and in appropriate promotions in the Borough.

10. Dispute Resolution

Both parties will endeavour to resolve disputes in a fair and equitable manner in the spirit of this agreement.

11. Legal Relations

This Document is a statement of the arrangements which both parties intend to operate but is not intended to create legally enforceable obligations between the parties.

Signed on behalf of Relate West Surrey _____

Position _____

Date _____

Signed on behalf of RBC _____

Position _____

Date _____

Consultation QUESTIONNAIRE

Your comments are important. You can complete this form and send it to us or you can email your comments. You do not have to answer all of the questions, but please answer those that are relevant to you.

The questions in this pull out section are also to be found in the key issues section of the consultation document under the following headings:

STRATEGIC FUNDING

BME INFRASTRUCTURE

RURAL INFRASTRUCTURE

FUND ADMINISTRATION AND MANAGEMENT

QUALITY AND STANDARDS

SOCIAL ENTERPRISE AND VCS INFRASTRUCTURE

ICT AND VCS INFRASTRUCTURE

VOLUNTEERING

COMMUNITY DEVELOPMENT

LOCAL GOVERNMENT

If you need more space to answer any of our questions, please continue on a separate sheet of paper. Please make sure you mark all separate sheets with the number of the question you are answering. Your comments should be received by 22 December 2003.

At the end of the consultation period, responses will be evaluated and will inform the drawing up of an Infrastructure Strategy with implementation plan and investment programme, which will be published in early 2004.

STRATEGIC FUNDING

1. How might greater collaboration be encouraged in order to minimise or eliminate duplication in infrastructure activity without unnecessarily limiting choice available to voluntary organisations?

2. Are there different services and roles that infrastructure organisations should focus on at local, sub-regional, regional and national levels?

3. To what extent should there be greater public sector strategic funding for infrastructure organisations and how might new developments build on the best of existing provision and avoid displacement of existing funding?

4. How might additional support be unlocked from various local, sub-regional, regional and national public sector agencies, lottery boards, charitable trusts, foundations and what role might private philanthropy play?

QUALITY AND STANDARDS

5. What are the key areas by which the effectiveness and performance of an infrastructure organisation should be judged?

6. Is benchmarking of infrastructure services and costs feasible?

VOLUNTEERING

7. How should volunteering infrastructure relate to wider VCS infrastructure?

8. What role should government play in developing the sector's ability to recruit and support volunteers effectively?

BME INFRASTRUCTURE

9. Which infrastructure functions are most appropriately delivered by specialist BME infrastructure organisations?

10. At which geographical level(s) are these functions most appropriately organised?

11. Is there scope to bring together some BME and generic infrastructure organisations and networks to share resources, but still ensure that the advocacy function for diverse BME communities is maintained?

SOCIAL ENTERPRISE AND VCS INFRASTRUCTURE

12. How can VCS access to services provided by the Small Business Service and other business support services best be encouraged?

13. How might additional support for social enterprises best be provided to complement that which is / will be available from the SBS?

14. Which infrastructure functions are most appropriately delivered by specialist social enterprise organisations, and how should this be supported at local level, regionally and nationally?

15. How should support for social enterprise relate to wider VCS infrastructure?

COMMUNITY DEVELOPMENT

16. How should the suggested minimum components of community level infrastructure inform the Infrastructure Strategy?

17. Who are the key stakeholders in developing infrastructure at community level?

RURAL INFRASTRUCTURE

18. How should the strategy best support rural VCS capacity building and infrastructure as a separate sub-set of support for the VCS in England as a whole?

19. Which VCS infrastructure and capacity building services are best organised at county level and which at district?

20. How can parishes and villages benefit the most from district and county VCS infrastructure and capacity building?

ICT AND VCS INFRASTRUCTURE

21. To what extent do you agree with the analysis and recommendations of the Advisory Group? (see Annex A for more details).

22. How could such activity generate income to meet at least part of the ongoing cost of operations?

LOCAL GOVERNMENT

23. What aspects of VCS infrastructure support should be primarily the responsibility of local authorities and what contribution should be made by other local, sub-regional and regional public sector agencies.

24. Which elements of infrastructure support should be funded by central government and its agencies?

25. What is the role of lottery boards, charitable trusts and foundations?

26. Is the suggested framework to guide local decision-making comprehensive?

FUNDING ADMINISTRATION AND MANAGEMENT

27. Are there viable alternatives to the role envisaged for Government Offices?

Guidance for additional comments:

Please provide your name

Who do you represent?

Have you consulted others in reaching your conclusions? If so, please provide details.

Completed Questionnaires

Please return your responses to: Tina Jenkins, Sector Development Team, Active Community Unit,
3rd Floor, Allington Towers, 19 Allington Street, London SW1E 5EB or email to cbis@homeoffice.gsi.gov.uk.

Runnymede & Spelthorne Homelessness Task Group

TERMS OF REFERENCE

1. To review progress on implementation of the Council's Homelessness Strategies.
2. To share information on homelessness issues.
3. To share information on possible funding opportunities that would assist with alleviating homelessness.
4. To disseminate good practice around homelessness and meeting the needs of homeless households.
5. To provide a focus for the development of inter-agency working on homelessness.
6. To assist with the establishment of programmes of joint and cross training between relevant agencies to learn together and from each other.
7. To encourage and facilitate the inclusion of homelessness issues into the action plans of related agencies.
8. To undertake relevant pieces of work relating to homelessness as agreed by the Group from time to time, by the establishment of Task Sub-Groups where appropriate.

5.9.03

Affordable Housing Programme

KEY OF ABBREVIATIONS:

Tenure mix
 SO = Shared Ownership
 RT = Rented units

Provided for
 GN = General Needs
 KW = Key Worker
 SP = Supported Housing

Registered Social Landlords
 SCDT = Surrey Community Development Trust
 APEX = Apex Housing Group formerly Spelthorne H.A.
 TVHA = Thames Valley Housing Association
 ECHT = English Churches Housing Group
 RSMHA = Rosemary Simmons Memorial Housing Association
 SHHA = Surrey Heath Housing Association/Peerless Housing Group

COMPLETIONS

TYPE OF SCHEME & ADDRESS	NO. OF UNITS	TENURE MIX	PROVIDED FOR	TOTAL
New Build				
<ul style="list-style-type: none"> ▪ King's Lane, Englefield Green ▪ Aldwyn Place, Englefield Green (Hanover) ▪ Young Builders, Egham (Rosebery H.A.) ▪ Elm House 19/21 Blays Lane, Englefield Green (SCDT) ▪ Mead Lane, Chertsey ▪ Sandgates, Chertsey 	13 56 Net gain 14 17 6 17 41 (83 units but only 50% counted towards total)	RT RT RT RT RT/SO RT	GN SP GN SP GN KW	114
Acquisitions				
<ul style="list-style-type: none"> ▪ 6 shared units for people recovering from drug/alcohol addiction (ECHT) 	6	RT	SP	
Airways Housing Trust				
<ul style="list-style-type: none"> ▪ Purchase of existing properties in Egham 	14	RT	GN	14
Street Property Schemes (LASHG funded*)				
<ul style="list-style-type: none"> ▪ Empty Homes - Leases (Hyde) ▪ Existing Satisfactory Properties (Apex) * ▪ DIYSO (TVHA) * ▪ Homebuy (TVHA) * ▪ Starter Home Initiative (TVHA) ▪ Purchase and Repair (RSMHA) * 	Provision 1 Jan 01- 31 July 03 8 19 104 39 44 11	RT RT SO SO SO RT	GN GN GN GN KW GN	225
Total no of units provided to date				353

5.

IN DEVELOPMENT

SCHEME ADDRESS	NO. OF UNITS	TENURE MIX	PROPERTY TYPE	PROVIDED FOR	COMMENTS/ CURRENT POSITION	ESTIMATED COMPLETION DATE IF KNOWN
Barker Road, Chertsey (TVHA)	15 Net gain 13	RT	1X2BED house 14x1&2 BED flats	GN	Site secured. Garages demolished and work commencing	September 2004
Chertsey Bridge Wharf, Chertsey (Airways HA)	21	RT & SO	18x1bed flats 36x2bed flats	GN & KW	Planning permission approved. Developer has commenced construction of the Shared Ownership and Key worker units. Other units are dependant on transitional LASHG	February 2004
St Georges College Addlestone (Pavilion HA)	26 Only 50% count towards target	RT	Houses	KW (Teachers)	Development no longer subject to a S106 agreement but still proceeding.	Imminent
Total that will count towards affordable housing target						47

SITES BEING ASSEMBLED

SCHEME ADDRESS	NO. OF UNITS	TENURE MIX	PROPERTY TYPE	PROVIDED FOR	COMMENTS/ CURRENT POSITION
Pooley Green Road Egham (TVHA)	7	RT	7x 3 bed Houses	GN	Flood risk assessment now complete. Planning application in the process of being submitted. No funding yet secured but bid to be made to the Housing Corporation.
Barrbrook Farm Chertsey (CDHA formerly Hyde)	17	RT	9x2 bed Flats 8x1 bed Flats	SH x6 &GN x11	Planning application submitted and approved on 4 th June. A bid for funding has been submitted to the Housing Corporation for transitional LASHG funding. Outcome still awaited
Fox Lane North Chertsey (TVHA)	24	SO	13x 1 bed flats 11x 2bed flats	GN	Negotiations taking place with Countryside regarding overall site. Unit numbers may change.
Thorpe Road Egham (Servite HA)	12	Undecided	Undecided	Undecided	Site assembly at an early stage and likely to be very lengthy.
Cerotus Place (Rosemary Simmons HA)	2	RT	2x 1bed flats	GN	Planning permission obtained. Outcome of transitional housing grant still awaited. Flood Plain issues may be a problem.
St Anne's Heath School Site Virginia Water	28	Undecided	Undecided	Undecided	Section 106 agreement regarding the provision of affordable housing is now complete and site being marketed by County Council. Agreement requires 40% affordable provision on site.
1-7 Barker Road, Chertsey (Apex Housing Group)	4	SO	4xflats	GN	Planning application made and S106 agreement being agreed between parties.
Ledger Drive (Peerless Housing Group)	17	Undecided	Undecided	Undecided	Site assembly is complex and scheme unlikely to be formulated till 2005
Tringham Close (Servite Homes)	14	SO	Houses and flats	KW	Scheme has not yet commenced and grant has to be taken up by March 2004
Chertsey Bridge Wharf (Phase II)	33	RT	Flats	GN	Planning consent obtained and construction started on part of site. Transitional LASHG bid for but not yet secured for these units

Hayden Crt, Pine Park, New Haw	4	RT	Flats	GN	Planning consent obtained but amended application to be submitted.
Total that will count towards affordable housing target					162

N.B. Property numbers and type may change during Planning process.

PLANNING COMMITTEE

Wednesday 15 October 2003 at 7.30 p.m.

7. PLANNING POLICY GUIDANCE NOTE 3 – HOUSING - PROPOSED CHANGES (DTS)

1. Purpose of Report

1.1 **The purpose of this report is to advise Members of the following Consultation Papers detailing Proposed Changes to Planning Policy Guidance Note 3 (PPG3) – Housing:**

- i) **Influencing the size, type and affordability of housing, July 2003; and**
- ii) **Supporting the delivery of new housing, July 2003.**

1.2 **This is a statutory consultation from the Office of the Deputy Prime Minister, and views and comments are invited no later than 31 October 2003. Copies of the documents have been placed on the Members' Intranet.**

2. Background Information

2.1 Research published by the ODPM (Delivery of Planning for Housing, July 2003) examined the implementation of PPG3 through the take up of its policies in Local Authority Development Plans, and their application through development control. The research found a complex picture of how PPG3 is being applied, that while PPG3 has generally been well integrated into forward planning and development control processes, there are certain barriers to effective implementation, causing delay in the delivery of housing development in some areas. Making reference to this research, Keith Hill, Minister of State for Housing and Planning, highlighted in his 'Planning for Housing Statement' (July 2003) where improvements could be made.

2.2 The Statement emphasised the Government's vision for sustainable communities as set out in the Communities Plan, and the planning system's role in providing sufficient, and better designed homes to meet a variety of housing needs. It also clarified aspects of the Government's policy for planning new housing as set out in PPG3, and the Government's intention to remove barriers to delivering the housing needed in communities, and to ensure the planning system is not a brake on an adequate and continuing supply of sites for housing in sustainable locations.

2.3 With these intentions in mind, the Statement encourages Local Authorities to implement PPG3 more effectively, in order to:

- enable the provision of sufficient new homes in the right place at the right time and avoid arbitrarily phasing new housing development;
- provide for at least 10 years potential supply of housing;
- put unneeded employment sites back into use through actively considering residential development;
- promote sustainable residential environments;
- be flexible on car parking requirements;
- improve the contribution development makes to securing affordable homes and ensure the size and type of housing better matches the need.

3. Influencing the Size, type and Affordability of Housing, July 2003

3.1 The Government announced in Sustainable Communities: Building for the Future, February 2003, that the existing guidance on planning for affordable housing would be updated and

supported with practical guidance about what works well and where. In particular the Communities Plan said the Government would consult on allowing Local Authorities to seek affordable housing on smaller sites where this is justified.

- 3.2 The aim of the proposed change is a policy framework that will secure more affordable housing as part of the delivery of agreed housing requirements. More emphasis is placed on producing a better match between the size and type of housing planned and the needs of the community.
- 3.3 The proposed change will be accompanied by practice guidance and will replace paragraphs 9-20 of PPG3 (the section entitled: Creating communities – influencing the type and size of housing), paragraph 71 and Annex B of PPG3 (relating to providing for rural exception housing), and DETR Circular 6/98 (Planning and Affordable Housing) which will be cancelled. It is intended that the practice guidance will provide much of the detail currently in Circular 6/98, particularly on the use of planning obligations. A draft framework of the envisaged practice guide is included in the consultation document (available on the Members' Intranet).

3.4 Key Proposed Changes

Creating mixed communities:

- 3.5 The proposed replacement section to paragraphs 9-11 of PPG3, is greatly simplified and excludes the PPG3 reference to the Government's household projections which indicated a projected increase in the number of new households over the longer term, stated as largely due to the growth of one-person households. The proposed replacement section emphasises that planning for housing policies should aim to widen the range of housing opportunity, addressing the housing requirements of the whole community, including those in need of affordable and special needs housing.

- 3.6 Paragraph 15 of the proposed changes strengthens the previous guidance in relation to delivering a better mix of housing, stating that in determining planning applications (where appropriate local plan policies are in place), Local Authorities should reject developments that conflict with the objective of widening housing choice.

Assessing housing needs:

- 3.7 The essence of this section remains the same, but includes changes in terminology in light of the future abolition of Structure Plans. The proposed replacement section (paragraphs 2-4) emphasises that Regional Planning Bodies (RPB) should maintain an up-to-date understanding of the likely housing requirements of their areas, having regard to Government policy to reduce volatility in the housing market and promote macro-economic stability as part of delivering sustainable development. This should inform the strategic framework for housing, the planning for housing policies, and annual rates of provision set out in regional planning guidance.
- 3.8 Paragraph 3 proposes that assessments of housing need should be drawn up jointly by Planning and Housing Departments working closely with housing providers (a change from PPG3), to assess the range of needs for different types and sizes of housing across all tenures in their area. It is also proposed that Regional Housing Boards should co-ordinate a programme of housing needs assessments to be undertaken by constituent Local Authorities to maintain a consistency of approach.

Comment

The emphasis is clearly upon a thorough assessment and evaluation of housing need, and the involvement of housing providers in the process (such as the House Builders Federation), would help to promote a transparent and workable methodology based upon a better understanding of the remit of the various partners.

Planning for affordable housing:

- 3.9 Definition/avoiding prescription of tenure: The guidance as to how Local Authorities should define affordable housing remains the same, but the key proposed change is stated in paragraph 6, that affordable housing should not normally be defined by reference to tenure,

except where this would address an identified housing need that otherwise would not be met by other types of affordable housing.

Comment

It has not been possible to seek the formal views of the Housing and Community Services Committee on this matter, but the Director of Housing and Community Services has made the following observations:

Contrary to the proposed change, it is considered that Local Authorities should be allowed to specify tenure. This is an area closely linked to funding and with limited funds to pay for affordable housing, developers are likely to prefer low cost tenures such as shared ownership. However new build shared ownership is also only affordable to a very small percentage of people in need.

The greatest need in the Borough is for rented housing, and the impact of not being able to specify tenure could mean all new housing is for shared ownership. This would not deliver the amount of affordable housing needed. The Chartered Institute of Housing recommends that Local Authorities should have the ability to stipulate tenure using the following types – social/intermediate (below market rent or shared ownership) market and based on local circumstances .

- 3.10 **Proportion:** A specific percentage proportion of on-site affordable housing provision is not proposed in the consultation document, but Local Planning Authorities are encouraged to identify in their local plans, sites on which affordable housing will be expected as part of residential or mixed-use development, and the amount of affordable housing to be sought from such developments as a proportion of the overall dwelling provision on site.
- 3.11 **Viability:** A key proposed change is the inclusion of a specific section highlighting the importance of ensuring that the affordable housing provision sought does not make the development unviable. Local Planning Authorities are encouraged to work with developers to ensure planning objectives reflect the development potential of sites, taking account of land costs, levels of public subsidy available for affordable housing, the need for residential development to be attractive to lenders of private finance, and avoiding prescription of tenure.

Comment

This is an important factor in considering the suitability of a site for the provision of affordable housing, and close working with the developer early in the planning process is to be encouraged. However, it should be stressed that there remains a presumption in favour of the provision of affordable housing on suitable sites, and that the housing industry will need to ensure that the development assessment of sites recognises the implications of accommodating affordable housing on site from the outset.

The Borough's Director of Housing has also commented that the viability of any affordable housing scheme will depend on the level of subsidy/grant available, and argues that affordable housing policies and funding are inextricably linked. The Borough has made some limited funds available within the Capital Programme for housing, but these are well below the amounts that were previously available under the Local Authority Housing Grant arrangements.

If the new Regional Housing Board does not make funding available to Runnymede for affordable housing then the Borough is unlikely to be in a position to provide significant capital funds, and the subsidy for the affordable units would have to come from the developer. This might mean that developers decide to use sites for alternative purposes or not to develop them at all. This is a real concern around Surrey and the Housing and Planning Officers have commissioned a study into the economics of providing affordable housing under the new arrangements, the results of which are expected in November 2003.

- 3.12 **Site Threshold:** Existing guidance in PPG3 does not set a site threshold (this is provided by Circular 6/98, which indicates that affordable housing policies should only be applied to housing developments of 25 or more dwellings or residential sites of 1 hectare or more,

irrespective of the number of dwellings. Lower site thresholds of 15 or more dwellings/0.5 of a hectare were deemed appropriate in Inner London (with no set threshold for settlements in rural areas with a population of 3,000 or less). The proposed change to PPG3 indicates that affordable housing should not normally be sought on sites of less than 0.5 of a hectare or developments of less than 15 dwellings, unless it can be justified by local planning authorities in their local plan having regard to a number of criteria. This would indicate that the minimum site threshold on which affordable housing provision can be sought is 0.5 of a hectare, or developments of 15 or more dwellings.

Comment

Policy HO4 of the adopted local plan applies a site threshold of 1 hectare and over, and housing developments of 25 units and over. However, analysis of housing completion figures between 1992 and 2002, reveals that 318 units were completed on sites from 0.5 – 1.0 hectare (or 16.5% of total), and also that just 18 sites of 25+ units were completed, providing a total of 1017 units. This compares to a more substantial 32 sites of 15+ units completed, providing a total of 1273 units (65.9% of total completions). This reveals that the lowering of the thresholds in Runcymede to those suggested by the proposed change to PPG3, would increase the number of sites on which affordable housing could be sought, providing the opportunity to develop homes for those in need in a variety of locations in the Borough, helping to create mixed communities. This issue is currently being considered by the Council as part of the early preparations of the Local Development Framework (aka Local Plan Review).

The Borough's Director of Housing adds that Runcymede has made good progress towards its affordable housing target and has provided 333 units against the 5 year total of 750. However the majority of these have been provided on the Council's land or through the acquisition of existing properties (e.g. through the Do It Yourself Shared Ownership Scheme). These opportunities are now limited and the majority of the remaining units will need to be delivered through private sites. The Borough has 60 units currently under construction and opportunities have been identified to provide a further 157, which leaves 200 to be found. It is unlikely that this provision will come from large windfall sites in the Borough, and we will need to amend planning policy to deliver the affordable housing target.

Delivering affordable housing:

- 3.13 Paragraph 12 of the proposed changes emphasises that applicants must comply with affordable housing policies in development plans, unless it is demonstrated that the particular physical and environmental constraints of a site, or other plan requirements, would make the provision of affordable housing unviable.
- 3.14 The proposed section then draws on the guidance in Circular 6/98, in terms of a presumption for on-site affordable housing provision, unless in exceptional circumstances, when it would be preferable to provide a financial or other contribution towards an element of affordable housing on another site.

Comment

The preference in Runcymede has historically been to provide affordable housing on-site as part of the proposed development, rather than invite commuted payments for provision on an alternative site. High land values in the area tend to negate the possibility of using financial contributions for off-site provision.

Determining Planning Applications:

- 3.15 The consultation document indicates that Local Planning Authorities should revise their plans to take account of the PPG, and when considering planning applications in the interim (before plans can be reviewed), local authorities should have regard to the policy as a material consideration which may supersede the policies in their plan.

Partial Regulatory Impact Assessment

- 3.16 The Partial Regulatory Impact Assessment (RIA) is presented within the consultation document, and provides a partial analysis of the costs and benefits of 3 possible sets of changes or options. Option 1 is to do nothing, and retain PPG3 and Circular 6/98 in their current form. Option 2 involves making changes to PPG3, cancelling Circular 6/98, and preparing an accompanying practice guide. Option 3 could involve a highly centralised and regulated approach, with national policy specifying the definition of affordable housing, site threshold, on-site proportion, and target for individual Local Authorities.
- 3.17 The Government prefers Option 2, as it would be expected to secure more affordable homes with a better match with community need through: greater co-ordination at regional and sub-regional levels; greater attention to assessment and evaluation; increasing the number of sites on which affordable housing can be sought (by lowering the site threshold); and simplifying the process thus enabling delivery to be speeded-up.

Comment

Option 2 appears the most credible, subject to the issues and concerns raised by the comments within this report.

4. Supporting the Delivery of New Housing, July 2003

- 4.1 The Government considers that despite the encouragement set out in PPG3, many Authorities continue to reserve an excess supply of employment land for development when it would make sense to consider it for housing.
- 4.2 The proposed change to PPG3 adds a new paragraph in the section concerned with "reallocating employment and other land to housing" (paragraph 42), and intends to encourage Local Authorities to allow land currently allocated for industrial or commercial use in their development plans, and redundant commercial buildings, to be used for housing or mixed-use development unless a convincing case for retention can be made.
- 4.3 The proposed change complements the current guidance in PPG3 that Local Authorities should, when revising their plans, review the justification of all sites allocated for employment uses and where appropriate consider their release for housing.

Proposed Change – New paragraph 42a

- 4.4 The proposed paragraph states that Local Planning Authorities should consider planning applications favourably on land allocated for industrial or commercial use in development plans that is no longer needed for that use, or redundant industrial or commercial buildings, unless the proposal does not reflect the policies of the PPG; or the housing development would undermine the planning for housing strategy set out in RPG or the development plan (particularly if it would lead to over-provision of new housing).
- 4.5 More significantly, Local Planning Authorities would have to demonstrate through an up-to-date review of employment land, that there was a realistic prospect of the allocation being taken up for its stated use during the plan period, or that its development for housing would undermine regional and local strategies for economic development and regeneration.

Comment

Land currently in industrial and commercial use in Runnymede, including the industrial estates and business parks, is not allocated specifically in the adopted local plan, which allows a certain degree of flexibility. For instance, housing development was successfully secured at Rusham Works in Egham, a redevelopment of a commercial site located in the middle of a residential area.

However, there is concern regarding the safeguarding of smaller premises in the urban area that serve an important local economic role, and the potential loss of key employment sites such as offices that may be vacant due to fluctuations in market demand. (That said, the Housing Task Group of the Borough's Community Strategy is keen on the re-use of long-term vacant offices for affordable housing, or the

development of generic buildings that can be adapted from offices to housing and vice versa, to cater for changing demands.)

Nevertheless, It is still considered unreasonable to expect the Local Authority to provide a case for the retention of employment sites, given that historically the determination of planning applications has never been directly influenced by market forces, and the resource implications for Local Planning Authorities in carrying out an economic evaluation of such sites would be unacceptable. Finally, it can be argued that relying on the market means that provision is linked to profit rather than what the area needs.

5. Conclusion

- 5.1 The report advises of two Consultation Papers published by the ODPM detailing Proposed Changes to Planning Policy Guidance Note 3 (PPG3) – Housing: Influencing the Size, Type and Affordability of Housing, July 2003; and Supporting the Delivery of New Housing, July 2003. The aim of the first proposed change is a policy framework that will secure more affordable housing as part of the delivery of agreed housing numbers. More emphasis is placed on producing a better match between the size and type of housing planned and the needs of the community. The second paper intends to encourage Local Authorities to allow land currently allocated for industrial or commercial use in their development plans, and redundant commercial buildings, to be used for housing or mixed-use development unless a case for retention can be made.
- 5.2 An Issues and Options Paper suggesting a new policy approach to affordable housing as part of the preparatory work on the Local Development Framework (and in the light of emerging Government and strategic policy guidance), will be presented to Planning Committee at the next meeting.

OFFICERS' RECOMMENDATION that -

the above-mentioned comments be forwarded to the ODPM as the Borough's formal response to the proposed changes to PPG3 – Housing, provided by the Consultation Papers: Influencing the Size, Type and Affordability of Housing, July 2003; and Supporting the Delivery of New Housing, July 2003.

(TO RESOLVE)

Background Papers

None.

HOUSING

BV Code	Description	2002/03 Target	2002/03 Outturn	2003/04 Target	Apr - Jun 2003	Jul - Sept 2003	Oct - Dec 2003	Jan - Mar 2004	Cumulative	Comments
BV 62	The proportion of unfit private sector dwellings made fit or demolished as a direct result of action by the local authority	2.00%	2.31%	1.50%	0.48%					
BV 63	The average SAP rating of local authority owned dwellings	52	57	60	Annual Figure					
BV 64	The number of private sector dwellings that are returned into occupation or demolished during 2002/03 as a direct result of action by the local authority	2.00%	1	12	7					Although the % has fallen during this quarter, this is not unusual at this time, and in previous years there has been a gradual improvement toward the end of the year.
BV 66a	Local authority rent collection and arrears: proportion of rent collected	98.70%	98.82%	98.80%	92.65%					
BV 74	Satisfaction of tenants of Council housing with the overall service provided by their landlord with results further broken down by: 1). Black and minority ethnic 2). Non black and minority ethnic tenants		86.00%	86.00%	86.00%					STATUS survey completed every three years. Next one due in 2005/06.
BV 164	Does the authority follow the Commission for Racial Equality's code of practice in rented housing and follow the Good Practice Standards for social landlords on tackling harassment included in the Code of Practice for Social Landlords: Tackling Racial Harassment?	Yes	Yes	Yes	No					This BVPI has been amended from last year. This results in us not complying with all requirements. An plan of action is being drawn up to meet the new requirements. There are a range of factors that affect the increase in the number of weeks in temporary accommodation. These can be explained at the meeting if required.
BV 183	The average length of stay in: a). Bed & Breakfast accommodation, b). Hostel accommodation of households which include dependent children or a pregnant woman and which are unintentionally homeless and in priority need a). Bed & Breakfast accommodation b). Hostel accommodation	5 weeks 40 weeks	1 week 43.7 weeks	4 weeks 40 weeks	N/A 47 weeks					
BV 184a	The proportion of LA homes which were non decent at 1 April 2002	-	18.80%	15.29%	18.80%	Annual Figure				
BV 184b	The % change in proportion of non decent LA homes between 1 April 2002 and 1 April 2003	-	38.00%	20.00%	Annual Figure					
BV 185	% of responsive (but non emergency) repairs during 2003/2004, for which the authority both made and kept an appointment	-	82.25%	85.00%						

COUNCIL TAX & HOUSING BENEFITS

BV Code	Description	2002/03 Target	2002/03 Outturn	2003/04 Target	Apr - Jun 2003	Jul - Sept 2003	Oct - Dec 2003	Jan - Mar 2004	Cumulative	Comments
BV 76	Does the authority have a written and pro-active strategy for combating fraud and error which embraces specified initiatives including those sponsored by the Department of Works and Pensions, which is communicated regularly to all staff?	Yes	Yes						Deleted in 2003/04	
BV 76a	The number of claimants visited per 1,000 caseload			500	107					
BV 76b	The number of fraud investigators employed per 1,000 caseload			0.5	0.54					
BV 76c	The number of fraud investigations per 1,000 caseload			60	4					
BV 76d	The number of prosecutions and sanctions per 1,000 caseload			5	2.5					
BV 78a	Average time for processing new claims	40 days	44.0 days	36 days	29 days					
BV 78b	Average time for processing notifications of change of circumstance	9 days	9.5 days	9 days	6 days					
BV 78c	% of renewal claims processed on time	83.00%	78.00%	83.00%	87.80%					
BV 79a	% of cases for which the calculation of the amount of benefit due was correct on the basis of the information available for the decision for a sample of cases checked post decision	95.00%	93.00%	98.00%	98.40%					
BV 79b	% of recoverable overpayments (excluding Council Tax Benefit) that were recovered in the year	55.00%	50.00%	50.00%	39.40%					

(DRAFT)

Heads of Terms: County Concessionary Fares Scheme

1st April 2004 to 31st March 2007

1 Legal Authority

1.1 The scheme is pursuant to Sections 145 to 150 of the Transport Act 2000.

2 Parties

2.1 "The Districts": Elmbridge, Epsom & Ewell, Guildford, Mole Valley, Reigate & Banstead, Runnymede, Spelthorne, Surrey Heath, Tandridge, Waverley and Woking.

2.2 "The County": Surrey County Council.

3 Appointment of Contractor

3.1 The Districts will appoint the County as the contractor for the operation of the scheme. The County will have full authority to negotiate with bus operators, maintain and operate the Scheme within the financial parameters determined in accordance with the Financial Arrangements.

3.2 The Districts will appoint a consultative panel (Districts Panel) of not more than three officers with whom the County will liase not less than half yearly on the operation of the Scheme.

3.3 An annual report on the operation of the Scheme will be prepared by the County in consultation with the Districts Panel and be submitted to the Surrey Local Government Association within three months of the end of each financial year.

4 The Scheme

4.1 The scheme is outlined at Appendix 1.

5 Scheme Enhancements

5.1 Enhancements to the scheme will be permitted provided:

- there is no adverse operational effect on the County wide scheme;
- the additional cost is met solely by the initiating District(s);
- any enhancement must be agreed by all parties to this Agreement.

6 Term of Agreement

- 6.1 The start date will be 1 April 2004 and the term of the agreement is to be three years, up to 31 March 2007.

7 Financial Arrangements

- 7.1 The County and the Districts will contribute to the half fare concessionary scheme in 2004/05 in accordance with column 3 of the schedule below. Due to pressure on its Local Bus Budget the County has to phase out its financial contribution to the scheme. The effect of re-distributing that contribution among the districts and boroughs in 2005/06 and 2006/07 is shown in columns 4 and 5 in the table below. The amounts for 2005/06 and 2006/07 will be maintained in real terms for the duration of the agreement.

AUTHORITY	Percentage Share	2004/05 Negotiated Contribution	2005/6 Contribution	2006/07 Contribution
(1)	(2)	(3)	(4)	(5)
	%	£	£	£
Elmbridge	10.59	213,303	225,790	238,277
Epsom & Ewell	8.91	179,474	189,981	200,487
Guildford	14.58	293,737	310,933	328,129
Mole Valley	6.70	135,013	142,917	150,821
Reigate & Banstead	10.43	210,101	222,401	234,700
Runnymede	6.14	123,626	130,863	138,101
Spelthorne	11.74	236,470	250,313	264,157
Surrey Heath	4.25	85,508	90,514	95,520
Tandridge	7.18	144,618	153,084	161,550
Waverley	10.52	211,793	224,192	236,590
Woking	8.96	180,531	191,099	201,668
Total cost to boroughs and districts	100.00	2,014,174	2,132,086	2,250,000
SCC Contribution		235,826	117,914	0
Total re-imburement		2,250,000	2,250,000	2,250,000

- 7.2 The Districts will pay the County in equal quarterly instalments (rounded as appropriate), seven calendar days prior to the Payment Dates under the Scheme. Payments to be made by electronic transfer to an account nominated by the County. Default interest (simple not compounded) will be payable at 4% above base for each day after the Payment Date if the Scheme payment is delayed.

8 Price Base

- 8.1 The price base for the agreement is 2004/05 prices. The price base will be maintained in real terms. The cash amount will be uplifted for each subsequent financial year by regard to the Retail Price Index (or successor index) for the July prior to the April of the said subsequent financial year compared to the base Retail Price Index (or successor index) for July 2003.

9 Administration

- 9.1 The Scheme will be managed and administered by the County at its own cost for the duration of the agreement. The Districts will administer the issuing of permits at their own costs for the duration of the agreement. Additional issuing bodies which may be agreed by the County from time to time shall be required to meet their own administrative costs.
- 9.2 Administration of the scheme, both centrally and at issuing points, will be reviewed and upgraded as soon as possible in order to contribute towards meeting Central Government's target for electronic service delivery by Local Authorities.
- 9.3 The County will be authorised to negotiate with the bus operators to secure the half fare scheme and shall at all times use its best endeavours to keep the cost of the scheme to the minimum cost reasonably achievable.

10 Disputes

- 10.1 Disputes between the parties to the agreement shall be referred to the Surrey Local Government Association (SLGA) for resolution. Should disputes not be settled by the SLGA within three months any party may refer the dispute to an independent person (Society) whose judgement shall be binding on all parties. The costs of disputes will be (provision to be made for the appointment of the independent person by say the Law met by the disputing parties, each bearing their own costs and an equal share of the costs of the independent person regardless of the outcome of the dispute.

**COUNTY CONCESSIONARY FARES SCHEME
SENIOR CITIZENS AND PEOPLE WITH DISABILITIES
GUIDELINES**

1 April 2004 to 31 March 2007

1 INTRODUCTION

In accordance with the provisions of the Transport Act 2000, the 11 Borough and District Councils within Surrey have appointed Surrey County Council to co-ordinate a jointly funded concessionary fares scheme for the administrative area of Surrey. The joint, countywide scheme, outlined herein, has been supported by Surrey County Council and will be implemented from 1 April 2004 to 31 March 2007.

This paper outlines the issuing arrangements and guidelines for bus operators.

2 ELIGIBILITY FOR TRAVEL CONCESSIONS

The concessionary fares scheme is provided under sections 145 to 150 of the Transport Act 2000, which govern "Mandatory travel concessions outside Greater London". The travel concession will be facilitated by the bus companies only on presentation of a valid permit, which will be issued free to eligible residents in Surrey.

To qualify for a Senior Citizen Bus Permit an applicant must live in one of the 11 Surrey Boroughs and Districts and be aged 60 or over.

To qualify for a Disabled Bus Permit an applicant must live in one of the 11 Surrey Boroughs and Districts, be at least 16 years of age, and be one of the following:

- Blind (so as to be unable to perform any work for which sight is essential).
- Partially sighted (with sight impaired to such an extent that the person cannot reasonably accurately estimate the size and speed of movement of vehicular traffic).
- Deaf.
- Without speech.
- Suffering from a disability or an injury, which seriously impairs the ability to walk.
- Without the use of both arms (whether by reason of the absence of those limbs or for any other reason).
- Learning disabled, that is, in a state of arrested or incomplete development of mind, which includes significant impairment of intelligence and social functioning.
- Refused or likely to be refused a driving licence on medical grounds, under Part III of the Road Traffic Act 1988 pursuant to section 92 of that Act (physical fitness).

An entitled senior citizen who finds it impossible to travel independently may apply for a Senior Citizen Bus Permit with "Plus One Companion" on the front and the back. A person who qualifies under one of the disabled categories and who cannot travel independently may

apply for a Disabled Bus Permit with "Plus One Companion" on the front and the back. This enables the holder and a companion to each travel at the concessionary fare.

With effect from April 2004, holders of a Disabled Bus Permit will be entitled to continue to hold a Disabled Bus Permit when they reach the age of 60 and beyond, provided their disability is considered permanent.

3 CHECKING ELIGIBILITY

The issuing Borough or District office should request proof of continuing residence in Surrey from all applicants and **ONE** of the following:

Senior Citizens and People with Disabilities

An existing permit holder should present the old permit. Disabled permit holders may retain their Disabled Bus Permits when they reach the age of 60.

Senior Citizens

A pensioner who has not had a permit before should provide proof of age e.g., a pension book or birth certificate.

Blind or Partially Sighted People

An applicant who is registered blind or partially sighted should present the registration card or letter provided by the Surrey Voluntary Association for the Blind.

An applicant who is blind or partially sighted and who is not registered in any way should be directed to the SVAB. In these circumstances a letter from the SVAB or a letter from Social Services is acceptable as proof of entitlement.

Deaf/Without speech/Impaired ability to walk/Without the use of both arms

An applicant who qualifies under **ONE** of these categories and who is registered or eligible to be registered as disabled with Surrey Social Services Department should provide a letter, confirming eligibility, from the local Social Services office. If the applicant is a blue badge holder then showing the badge will suffice, a letter is not required.

People who may qualify under **ONE** of the above and who are not registered in any way should be directed to the local Social Services office, where their eligibility can be assessed. Anyone who qualifies will be given a letter from Social Services confirming their entitlement.

Refused/Likely to be refused a driving licence on medical grounds

Anyone who has been or is likely to be refused a driving licence on medical grounds can provide a copy of the refusal letter from the DVLA as proof of entitlement or a letter from their doctor which clearly states why they may not drive.

Under the legislation governing concessionary fares schemes applicants in this category are entitled if they have:

- (i) certain disabilities, known as "prescribed" disabilities (e.g. epilepsy); or
- (ii) any other disability which causes them to be a source of danger as a driver.

Companion Permits

An application for a companion permit should be accompanied by a letter from Social Services confirming that the person is eligible and that they cannot travel alone.

General

The concessionary fares leaflet directs people who are blind or partially sighted to the SVAB and people with disabilities to the local Social Services office. If an obviously disabled applicant goes to a Borough or District office before contacting either of the above, then a permit can be issued **at the discretion of the issuing officer**. In such circumstances a telephone call to the SVAB or the local Social Services office to check eligibility may be helpful.

Companion permits should not be issued without written authority from Social Services. However, if the person is obviously in need of assistance then the issuing officer can again use discretion.

4 TRAVEL CONCESSIONS TO BE PROVIDED

On presentation of a valid concessionary permit each participating transport operator is required to offer travel at half the standard adult single or return fare for journeys on routes which operate within, or, come into and stop in the administrative County of Surrey.

Senior citizens and people with disabilities can use their permits throughout Surrey on local bus services and on Surrey Heath Dial-a-Ride. Permits can also be used for journeys outside Surrey, on services which come into and stop in Surrey. Permit holders can normally travel as far as the bus is going.

Senior Citizen bus permit holders are entitled to travel at the concessionary rate after 9am on Mondays to Fridays and all day on Saturdays, Sundays and Public Holidays. Disabled bus permit holders are entitled to travel at the concessionary rate at any time.

A bus permit with "Plus One Companion" printed on the front and on the back enables the holder and a companion to each travel at the concessionary rate, subject to the conditions applicable to Senior Citizen and Disabled permits.

The Transport Act clearly states that the people who qualify must be able to travel at half fare, on presentation of a valid permit. Where the half fare calculation results in a fraction of a penny, the result must be rounded down to ensure that the fare paid by the permit holder does not exceed the half fare statutory maximum.

Permits issued under this scheme **may not be used** on:

- Route 80 which runs between High Down Prison and Hackbridge.
- Express coach services run by National Express.
- Special services to specific destinations including race meetings and short duration events.

Routes which do not come into Surrey could be added to the scheme but would have to be funded separately by individual Boroughs and Districts. For example, Epsom & Ewell Borough Council fund the acceptance of Surrey permits on the 151 route between Worcester Park Station and Sutton Bus Garage, and on the 213 between Kingston and Sutton.

Operators may offer additional concessions, which will not be reimbursed by the County Council.

Information on bus routes is available from Traveline on 0870 608 2 608.

5 SERVICES ELIGIBLE FOR REIMBURSEMENT TO OPERATORS

Generally, the services eligible for reimbursement are all of the registered local bus services operating in the administrative county of Surrey, including commercial routes, Surrey County Council minimum subsidy contracts, de-minimis agreements and contracts let by other authorities, with the following exceptions:

1. Services identified in paragraph 4 above as ineligible.
2. Services operated primarily between hotels and airports.
3. RailAir Express between Woking and Heathrow.
4. Services whose stopping pattern is such that they stop less frequently than once in every route mile on average within the County and/or do not have short distance fares.
5. Services which do not qualify for bus service operators' grant.
6. Services that are run under minimum cost contract to the County Council. The operator invoices the County Council for this type of contract, net of revenue, i.e., the revenue is deducted from the gross daily rate. Companies operating this type of contract must accept permits but will not receive reimbursement.

The above criteria, which are not exhaustive, are intended to ensure that compensation is directed to local services. Any classification disputes which arise and which cannot be resolved between the operator and the County Council will be referred to the Passenger Transport Liaison Group.

6 REIMBURSEMENT PROCEDURE

The scheme will provide £2.25 million reimbursement to operators at 2004/05 price levels. This will be maintained in real terms for the duration of the Scheme.

For the 2004-07 Scheme the payment to operators for accepting Senior Citizen and Disabled Bus Permits will continue to be distributed in proportion to the scheduled mileage operated.

The reimbursement will be divided into four equal amounts and distributed to the bus companies by the middle of each quarter, in proportion to each operator's total weekly scheduled mileage for routes which serve the 11 Boroughs and Districts in Surrey. To

facilitate payments being made by the middle of each quarter the mileage returns must be submitted during each quarter by the following dates:

21 April, 21 July, 21 October, 21 January.

Equivalent Surrey Miles Operated in Service

The quarterly reimbursements for each company will be calculated using the equivalent weekly Surrey miles, operated in service, which will be derived as follows:

- Surrey operated miles for big bus (more than 25 seats) *1+
- Surrey operated miles for mini bus (25 or fewer seats) * 0.70 +
- Outside Surrey miles for big bus (more than 25 seats) * 0.12 +
- Outside Surrey miles for mini bus (25 or fewer seats) * 0.084.

For example if a company operated 100 miles for route 1234 in each of the above categories the equivalent weekly Surrey mileage, operated in service, used to calculate the reimbursement would be 190.40. $[100*1+(100*0.70)+(100*0.12)+(100*0.084)]$.

Routes, requested by the Boroughs and Districts, which are run entirely outside the County will be reimbursed at the outside Surrey rate. For example, the mileage submitted for big bus would be multiplied by 0.12, if the mileage is run by a mini bus then the total mileage submitted would be multiplied by 0.084.

Mileage figures required from the Bus Companies

All operators who wish to be reimbursed under the scheme must submit weekly scheduled mileage figures for routes which come into Surrey. Operators must provide these figures in the following format:

Route Number	Surrey Miles				Outside Surrey Miles			
	Big		Mini		Big		Mini	
	School Days Week	Non School Days Week	School Days Week	Non School Days Week	School Days Week	Non School Days Week	School Days Week	Non School Days Week

Forms set out in this way will be sent to each company three weeks before the due dates outlined above. The companies must complete the forms and return them by the due date by post or fax to the Passenger Transport Group, Room 306 Surrey County Council, County Hall, Penrhyn Road, Kingston, KT1 2DY. Fax number 020 8541 9389. A spreadsheet outlining the mileage figures in a similar format to the form will also be acceptable.

Operators must always confirm the dates on which mileage changed. For example if the mileage on a route changes, an operator must list the weekly operated mileage in service before the change and the last day on which it operated at that level, as well as the new mileage and the start date for that level.

The latest figures provided by the operators will be used to calculate the quarterly payments. In order to ensure that there are no gaps in the mileage figures submitted from one quarter to the next, all changes to the route mileage must be recorded by the operator and submitted to the County Council. For example if the mileage on a route changes twice between the quarterly submissions then this needs to be stated clearly on the form or spreadsheet and the dates listed as outlined above.

It is the operators' responsibility to declare the eligible mileage for the Concessionary Fares reimbursement calculation. The County Council reserves the right to check mileage, and where a figure based on road measurements is available, it will be used. Operators may challenge this calculation if it varies by more than 2% (by route) from their own figures.

If an operator fails to provide the mileage information in the required format by the dates specified, then the reimbursement will not be paid until the figures are supplied.

The County Council reserves the right to withhold payments in the event of non-operation of bus services and to make specific individual arrangements in circumstances where it may be appropriate to do so.

Where an operator has a new route, no reimbursement will be made for this until the mileage figures and a fare chart are submitted. This also applies to operators who have not previously participated in the Surrey scheme.

Surrey Contracts

Payments are based on the vehicle size specified in the contract documents, rather than the vehicle size actually used. Operators are not reimbursed for minimum cost contracts because these are paid for by the County Council, net of revenue.

Payment Dates

The anticipated quarterly payment dates are as follows:

- By Mid May
- By Mid August
- By Mid November
- By Mid February

The County Council will not be under any additional obligations to operators, should the dates fail to be met.

There are no set dates for entry into the scheme. Operators who wish to join and be reimbursed for accepting countywide permits must write to the Passenger Transport Group at County Hall. New or changed routes will be included as soon as practicable after the services start.

7 SURVEYS AND FARES TABLES

If the County Council decides to survey services which are in the scheme, the operator will be notified before the survey is carried out. Operators are required to supply fares tables for all participating services, and revised tables for any routes which change, within seven days of this taking effect.

8 CONFIDENTIALITY

The information provided by the operators to the County Council, for the administration of the Concessionary Fares Scheme, will not be disclosed by the County Council or the Boroughs and Districts to another operator or to the public without the consent of the operator concerned, unless the information is public knowledge.

9 MONITORING PERMIT ISSUES

A system for recording the details of each permit issued must be operated by each issuing authority so as to at least provide the minimum amount of information reasonably required by the County Council for the monitoring and future development of the scheme. This is particularly important for each Borough and District as the information collected will determine each authority's contribution in the future.

A summary of the quarterly issues should be recorded on the forms supplied by the Passenger Transport Group and returned to the following address by the dates specified on the forms.

The Passenger Transport Group
Sustainable Development Department
Room 306
County Hall, Penrhyn Road
Kingston upon Thames, KT1 2DY

10 DUPLICATE/REPLACEMENT PERMITS

When a permit is lost this should be reported immediately to the borough or district which issued it. A duplicate permit will be issued free of charge.

11 COMPLAINTS

If permit holders are overcharged, they should try to resolve the problem with the bus company concerned. Complainants should be advised of this and asked for information which will help identify the driver, i.e. date, route, time of bus, boarding and alighting points.

HOUSING SERVICES
BUDGET MONITORING AND SUMMARY FORECAST STATEMENT
As at 31 October 2003

	2003/04 Budget £'000	Future Years		
		2004/05 £'000	2005/06 £'000	2006/07 £'000
Original Budget	1,263	1,263	1,263	1,263
Supplementary Estimates:	-			
Other Developments				
Benefit - potential growth in Rent Allowances	25	25	25	25
Supporting People - costs not met by grant		10	15	15
Housing Standards		45	45	45
Private Sector Housing Renewal		5	5	5
Enabling Role - cessation of support for Aldwyn Place		-10	-20	-20
- private sector condition survey		10		
- new software licences		3		
- needs survey		35		
Homelessness - continued low demand for B & B	-50			
Reduced provision for short term leases		-15	-15	-15
Reduced provision for rent deposit scheme		-5	-5	-5
Homelessness Strategy		35	35	35
Budgets carried forward from 2002/03	-			
Latest Budget Projections	<u>1,238</u>	<u>1,401</u>	<u>1,348</u>	<u>1,348</u>

COMMUNITY SERVICES
BUDGET MONITORING AND SUMMARY FORECAST STATEMENT
As at 31 October 2003

	2003/04 Budget £'000	Future Years		
		2004/05 £'000	2005/06 £'000	2006/07 £'000
Original Budget	2,008	2,008	2,008	2,008
Supplementary Estimates:				
Discretionary Rate Relief - Dyslexia Institute	5	5	5	5
Q.E. House Day Centre - drainage works	5			
Other Developments				
Community alarms - reduced maintenance provision		-5	-5	-5
Day Centres - franchising evening use			-15	-15
- Graffiti Team Virement	-1	-1	-1	-1
Concessionary Bus Fares		-18	-11	-4
Community Transport - Dial a Ride			20	25
Budgets carried forward from 2002/03				
Day Centre - Special Works	3			
Elderly Services Admin	1			
Latest Budget Projections	2,021	1,989	2,001	2,013