**Charnwood Borough Council**

**TENANT BIDS FUND**

**POLICY**

|  |  |  |
| --- | --- | --- |
|  |  |  |
| **DATE:**  **REVIEW DATE:** | June 2024  June 2027 |

**Approved by the Charnwood Housing Residents Forum on June 2024**

|  |  |  |  |
| --- | --- | --- | --- |
| **Created / Amended by** | **Date Reviewed** | **Detail of Amendment** | **Version** |
| Created by Sally Ramalho, Principal Officer – Customer Engagement & Older Peoples Services  Amendments by Sally Ramalho, Principal Officer – Customer Engagement & Older Peoples Services | September 2015  November 2017 | Updated from CNH document.  Refreshed document, clarifying process for underspend, contingency funds and timetable for projects. New policy agreed by CHRF November 2017 | 1.1  1.2 |
| Amendments by Sally Ramalho, Principal Officer – Customer Engagement & Older Peoples Services | November 2021 | Policy amendments for changes to budget and budget allocation.  New policy agreed by CHRF November 2021 | 1.3 |
| Amendments by Sally Ramalho, Principal Officer – Customer Engagement & Older Peoples Services | June 2024 | Policy amendments for budget allocation.  New policy agreed by CHRF June 2024 | 1.4 |

CONTENTS

Section Page

[1. What is the Tenant Bids Fund? 4](#_Toc360535729)

[2. Criteria for the Tenant Bids Fund 4](#_Toc360535730)

[3. Consultation 5](#_Toc360535731)

[4. Examples of previous projects 5](#_Toc360535732)

[5. Who can apply? 5](#_Toc360535733)

[6. How do I apply? 6](#_Toc360535734)

[7. What happens next? 6](#_Toc360535735)

[8. Leaseholders 8](#_Toc360535736)

9. Underspends and contingency fund……………………………………………………………..8

Appendix 1 – Lifecycle of a tenant bid…………………………………………………………10

Appendix 2 – Tenant bid application form…………………………………………………….11

Appendix 3 – Impact assessment form………………………………………………… ……12

# What is the Tenant Bids Fund?

* 1. The Tenant Bids Fund is for the benefit of tenants and leaseholders who identify a project which will improve the communities where they live. The project should benefit a group of tenants and leaseholders or a whole community and not just one individual tenant. The Bids Fund is financed from tenants’ rent money and so while leaseholders can suggest a bid there must be support from tenants in their community.
  2. Tenants and leaseholders are encouraged to use their imagination and identify new ways to solve old problems.
  3. Charnwood Borough Council (CBC) provides funding each year from the Housing Revenue Account (from tenants’ rent money); the annual budget is currently £30,000. This is split between the sheltered schemes, via the Senior Citizens Forum (SCF) (£7,500), the rest of the Borough (£20,000) and a contingency fund (£2,500). Decisions on which projects will be funded are decided by ballot through the Charnwood Housing Residents’ Forum (CHRF) and the Senior Citizens Forum (SCF). A record will be kept each year to ensure that monies are distributed fairly across the borough/sheltered schemes.
  4. The Tenant Bids Fund gives tenants and leaseholders the chance to be involved in the decision making process and decide how and where to spend money in their area. Members of the CHRF and SCF will review the bids and decide where the money will be allocated.
  5. CBC staff will provide advice, information and support to tenants and leaseholders when submitting bids and to the CHRF/SCF in assessing and approving the bids. CBC will also identify projects and it will actively seek nominations where projects will radically improve communities.

# Criteria for the Tenant Bids Fund

* 1. To qualify a bid has to be:
  + Something that will benefit tenants
  + Something that will still be there in five years time
  + Something that will benefit more than four households
  + Something that has the support of the majority of the people who will be affected by it (at least 51%)
  + Something that must add value to the property or land owned by Charnwood BC that has no on-going maintenance costs.
  + Something Charnwood BC would not normally fund
  + Not be for more than £5,000.
  1. The improvement:
  + Can be environmental to open spaces or to improve existing areas to flats and maisonettes
  + Can help prevent or reduce anti social behaviour
  + Should enhance the quality of life for tenants
  + Cannot be for projects which would normally be funded out of alternative budgets e.g. planned maintenance, grounds maintenance

2.3 Where the funding bids exceed the amount of budget available in any financial year, the following criteria will be applied:

* schemes/estates where tenant bid funds were allocated in the previous year will not be considered in the current year.

# Consultation

Consultation is a very important part of the TBF process. Consultation ensures that the proposals submitted have support and that they are not just the wish of a few people in an area. The Customer Engagement Team will ensure that sufficient consultation has been carried out for each project. Projects that do not have majority support (at least 51%) from those affected by it, will not meet the criteria.

# Examples of previous projects

* 1. Some examples of TBF suggestions include:
  + Lighting – for example; security lighting, communal lighting
  + Signage – for example; maps to assist visitors to find properties, community noticeboards
  + Landscaping – for example; green spaces, communal areas, sheltered schemes, benches, raised beds, pergolas
  + Resurfacing – for example; paths, drying areas
  + Improving community facilities – for example; water heaters for communal rooms. This does not include soft furnishings or audio visual equipment
  + Increased security – for example; external lighting which do not require ongoing maintenance or monitoring charges
  + Improving access for disabled and elderly tenants – for example; removing steps and replacing with ramps, which are not met through our adaptations policy

# Who can apply?

* 1. Individual tenants or leaseholders can apply, as well as recognised Tenant and Resident Groups.
  2. Each year CBC will actively seek nominations for the Tenant Bids Fund through Estate Walks, Complaints, and suggestions from Councillors and Tenancy and Estate Management Officers.
  3. Where suggestions are raised from Local Councillors or CBC staff for improvements, the Customer Engagement team will actively seek involvement from tenants and leaseholders in the application process.

# How do I apply?

* 1. Any tenant or leaseholder can submit a Bid by completing an application form in writing or online. There is an information leaflet available to tenants and leaseholders which includes the application form. If you require assistance to complete the form then please contact a member of the Customer Engagement Team on 01509 634955, by email [involvement@charnwood.gov.uk](mailto:involvement@charnwood.gov.uk) or by writing to Charnwood Borough Council, Southfield Road. Loughborough LE11 2TN.
  2. TBF submissions must be received by CBC’s Customer Engagement Team **before 31st August** each year. This will allow adequate time to ensure all submissions have been fully consulted, costed and agreed. Submissions can be received throughout the year and will be included in the next round of budget allocation/voting.
  3. Each project application should include:
  + What the improvement is
  + Where the improvement will be made
  + Why it is needed and any evidence to support it
  + What the benefits will be and how many tenants, residents and leaseholders will benefit from the improvements.
  + What consultation has been carried out to ensure that the project has local support. Consultation should be undertaken with residents in the area affected by the project to find out if they agree to the project in principle.
  + How tenants and leaseholders will contribute to the project.

# What happens next?

**Stage 1**

* 1. Completed bids are received by the Customer Engagement Team who assess the application to ensure that it meets the required criteria for a bid and there is evidence of consultation.
  2. Where there is any uncertainty as to whether the bid meets the capital expenditure criteria, the bid is passed to the Asset Management team to decide whether the bid is appropriate. The Asset Management team will ensure there are no ongoing maintenance costs or if the works are part of planned maintenance or other budget spend.
  3. Consultation will be undertaken with interested stakeholders, such as Tenancy and Estate Management and Grounds Maintenance contractors to ensure that they are in agreement with the proposal.
  4. The Customer Engagement Team send a letter to the tenant(s) acknowledging receipt of the bid and confirming whether or not it meets the criteria within 10 days.

**Stage 2**

* 1. The Customer Engagement Team will:
  + Identify the number of Council properties benefitting from the project
  + Identify homes which are freehold or leasehold owned
  1. The Asset Management team will assist with the following:
  + Check if work is already included in other contracts/ budgets
  + Work in partnership with other departments within the Council, especially where changes in land use are proposed or planning permission is required
  + Provide any maps, costings, detailed drawings, photographs of locations or statistics needed for the submission
  + Provide professional feedback on the viability of the project
  + Reject any bids which they estimate will cost more than the £5000 limit
  + Asset Management will not provide quotes or specifications for landscaping works
  1. The Customer Engagement Team will co-ordinate a site visit to confirm the exact plans for the project and invite the Asset Management Team and the bidders to attend. A member of the Customer Engagement team will attend the site visit to offer advice and assistance regarding any further consultation requirements. Tenants proposing the scheme should also attend to ensure everyone is clear on what works are to be quoted for.
  2. The Customer Engagement team will work with tenants to suggest ways of carrying out the consultation and to make sure that all affected parties are included in the consultation. The project must be supported by the majority (at least 51%) of affected tenants and leaseholders. Work will be procured on the basis of cost and quality on the basis of the Council’s Procurement Policy.
  3. It is important that all consultation for bids that may affect leaseholders is done in line with statutory consultation procedures (Section 20), stating the approximate cost per property. Leaseholder consultation can take up to 4 months depending on the work to be done.
  4. Once the final plans have been drawn up, the Asset Management Team will obtain three quotes for the project, except for landscaping works. Consideration will be given to both cost and quality for the quotes.
  5. The Customer Engagement team will work with tenants and leaseholders who have submitted projects to prepare a presentation for the CHRF/SCF meetings.
  6. Voting on the bids will take place at the March meeting of the CHRF and the SCF. If necessary, a special CHRF meeting will be held in March each year for the sole purpose of Tenant Bids. Projects must receive support from at least 50% of tenants voting at the meeting. **Only one vote is permitted per group attending**

Where a tenant or tenant(s) from the same location/estate/ area submits more than one bid or more than one project where both bids/projects are successful they will be required to decide which of the ‘works’ they would like to have completed in the event of bids exceeding the £30,000 budget.

* 1. The Customer Engagement team will administer the vote and inform the Asset Management team of the successful bids. All funds will be allocated for the following financial year and works will be programmed to be completed between April and March each year.
  2. The Customer Engagement team will send letters to all bidders to inform them of the results of the vote.

**Stage 3**

* 1. A site visit will take place after the projects have been approved for the bidders to meet the contractor and sign off the final plans. Plans should be signed off by the tenant submitting the project, a member of the Asset Management team, Customer Engagement team, and the selected contractor. Slight adjustments can be made at this stage but the projects must be completed within the allocated budget. Contracts will be let with the intention that the contractor does the work.
  2. The Asset Management team will commission the works and inform the tenants and leaseholders of the proposed start dates and estimated completion times for the projects. All payments will be made directly to the contractor.
  3. The Customer Engagement Team will provide quarterly reports on the projects to the CHRF and SCF.
  4. The Asset Management team will monitor the quality of work and inspect all completed projects.
  5. The Asset Management team will inform the Customer Engagement team when the projects have been completed.
  6. After each project has been completed, a feedback survey will be sent to all tenants and leaseholders in the area. Six months after completion, the Asset Management team, Customer Engagement team, representatives from the HMAB and the Chair and Vice chair of the CHRF and SCF will visit the completed projects and will undertake an impact assessment on the project using the results of the survey. The Asset Management team will assess the quality of the work and the benefits of the project to CBC. The Customer Engagement team will assess the process and the benefits of the project for tenants.
  7. A report will be produced jointly and this will be presented to CHRF and SCF.

# Leaseholders

* 1. On receipt of a Tenant Bid application, the Asset Manager will identify whether leaseholders will be required to pay a proportion of the cost of the works. This will depend on the terms of the lease and the nature and cost of the work. Leaseholders will be charged for work within the surrounding area i.e. block or estate, which is not defined as an environmental improvement. Any works that are carried out which will subsequently become a repair and maintenance liability, for example additional security lighting, will be charged to leaseholders and will be invoiced separately.
  2. Where leaseholders are required to pay, the statutory consultation procedures (Section 20) will be followed. It is essential therefore that all consultation for Tenant Bids, which may affect leaseholders, is done in line with the statutory procedures. Consultation notices will be served on the affected leaseholders in accordance with the statutory procedures.
  3. Once the final list for the Tenant Bids projects has been approved by the CHRF/SCF, leaseholders will receive a final costing for the works.
  4. At completion of the work, the Leaseholder Officer must be made aware of all the addresses where the work has been carried out and the actual completion date. The Leaseholder Officer will then raise invoices to the leaseholders for the completed works and the cost will be collected in quarterly instalments.

**9. Underspends and contingency fund**

9.1 Whilst every effort is made to ensure that projects do not require further maintenance and tenants take ownership of a project, unforeseen costs may occur. The contingency fund is to allow for such occurrences and ensure there is no adverse impact on the repairs or other budgets. The fund can be used for the lifetime of the works which is 5 years.

9.2 There may be occasions where there are not enough viable projects submitted to allocate all the budget at the voting stage of the process (7.11).

9.3 If there are more projects than funds for SCF bids and an underspend in the budget for the rest of the borough, members of the CHRF will vote to decide if funds can be transferred to the SCF bids. Likewise an underspend on SCF budget can be voted on and transferred to projects for the rest of the borough if there is a need.

9.4 Where there is any underspend where all projects have been agreed at the voting stage (7.11) then any submissions received between 1st September and 31st May will be considered and stages 1 – 3 of the process will be carried out.

9.5 Voting for these projects will take place at the August meetings of the CHRF and SCF. It is anticipated that work on these projects will be commenced before the end of the financial year.

**Appendix 1 - Lifecycle of a Tenant Bid**

|  |  |
| --- | --- |
| Date | Action |
| 31st August | Final date for submissions to be considered in March bidding |
| 1st September – 31st December | Consultation with tenants on viable projects  Any permissions and drawings to be agreed  Quotations to be received |
| 1st January – 28th February | Customer engagement team to work with tenants of viable projects to prepare presentations for March CHRF & SCF meetings |
| March | Voting at CHRF and SCF meetings to agree projects to be funded |
| March - June | Final project plans to be signed off and works to be commissioned to contractors |
| 31st May | Final submission date for any projects should there be any underspends |
| June | 1st quarterly update of projects at CHRF & SCF |
| September | Voting at CHRF and SCF meetings should there be any underspends  2nd quarterly update at CHRF & SCF |
| December | 3rd quarterly update |
| March | 4th quarterly update |

N.B. – This is the lifecycle in one phase of tenant bids. The phase will run over more than one year and there will be projects ongoing from previous years running concurrently with new projects

**Appendix 2 – Application Form**

**Tenant Bids application form**

|  |
| --- |
| **1. Name of residents’ group, panel, housing officer or individual**  **submitting the Tenant Bid proposal:** |
| **2. Address for correspondence:** |
| **3. Telephone number:**    **Email address:** |
| **4. Briefly describe the proposal, (where possible include measurements,**  **photographs, and drawings)**      (continue on another sheet if necessary) |
| **5. Describe the reasons for the proposal and explain how it will benefit**  **residents in the area.**  *(Things you might want to consider are how it improves the overall appearance of the area, who will benefit from the project, and what opportunities are generated for community involvement.)*    (continue on another sheet if necessary) |
| **6. Describe the consultation that has so far been undertaken with tenants and**  **what further consultation will take place:**  *(Please attach survey/questionnaire result and if applicable details of promotional*  *activities/events)* |
| **7. How will tenants in the area contribute to the project?**  *(This does not have to be a financial contribution it may be offering assistance with the*  *installation, upkeep or future support for the project)* |
| **8. Please indicate if the project meets any of the following criteria:**  *(Please tick all those that apply)*  Help prevent or reduce anti-social behaviour ⬜  Contribute to an environmental improvement to communal areas ⬜  Encourage activities to engage with the community ⬜  Enhance the quality of life for tenants⬜ |
| **9. Please tell us how your project meets the criteria:** |

**Please return the completed form to:**

Customer Engagement Team, Charnwood Borough Council, Council Offices, Southfield Road, Loughborough, LE11 2TX.

For all enquiries, assistance completing this application form or for a copy of the full Tenant Bids Procedure Guide please contact the Customer Engagement Team on 01509 634 955 or email [involvement@charnwood.gov.uk](mailto:involvement@charnwood.gov.uk).

**Appendix 3 – Impact assessment form**

**Impact Assessment – Tenant Bids**

|  |  |
| --- | --- |
| Scheme & Association |  |
| Details of bid awarded – summary or attach original bid |  |
| Amount of grant received / cost of works |  |
| Date work completed |  |
| Review period  (circle as appropriate) | 6 month 12 month |
| Review of work undertaken |  |
| Detail benefits to residents/ scheme/community (e.g.; reduction in ASB, enhanced community activity, improved facilities etc) |  |
| Detail benefits to CBC (e.g.; reduction in communal repairs, increased satisfaction with neighbourhood etc) |  |
| Any other comments |  |