



## Our Partnership Plans with Caledonia Housing Association – An Update for Faifley Residents

Welcome to the 2nd edition of Transfer News. As mentioned in the 1st edition sent to all residents in August, we will keep you all regularly updated on the progress being made with the plans for our proposed Transfer of Engagements to Caledonia Housing Association.

Last time around we provided information on why we are looking to transfer to another housing association, an overview of our selected partner – Caledonia Housing Association, and the benefits that we are looking to achieve for Faifley tenants. We also introduced your Independent Tenant Adviser – the Tenants Information Service (TIS) – who will work with tenants on all aspects of the transfer process, as well as being available to answer any queries that tenants may have on Caledonia's offer. You can find more information on these issues in Edition 1 of Transfer News on our website: [www.faifleyha.co.uk](http://www.faifleyha.co.uk) or on our Facebook page: @FaifleyHA or by requesting a copy from the local office.

We also included a 'Have Your Say' survey on transfer issues. We wanted to hear your views on the transfer priorities, what matters most to you for the future and to ask if you wanted to get more involved in helping to shape the transfer plans.

# TIS

## A Reminder About TIS - Your Independent Tenant Adviser: TIS

The Tenants Information Service (TIS) has been appointed to work with tenants to ensure you have all the information you need and an opportunity to give your views about the proposed Transfer of Engagements (transfer) of Faifley Housing Association to Caledonia Housing Association.

Please do get involved, we cannot stress enough how much of a difference your opinions make to the work we are doing to make sure the transfer proposals reflect your priorities.



Don't forget you can find out more about Caledonia Housing Association, who have just won the 'Housing Association of the Year' accolade at the Scottish Home Awards, online at [www.caledoniaha.co.uk](http://www.caledoniaha.co.uk) or by following them on Facebook @CaledoniaHA or Twitter @Caledonia\_HA



Caledonia Housing Association is the trading name of Caledonia Housing Association Ltd

Registered Office: 5 South St Johns Place, Perth PH1 5SU Caledonia Housing Association Ltd is a registered society under the Co-operative and Community Benefit Societies Act 2014 – Reg. No. 2343R(S)

Scottish Housing Regulator Reg. No. HEP 224

Scottish Charity No. SC013988

## How to get involved

We want you to be involved throughout the Transfer of Engagement process. Your thoughts on the transfer have shaped the proposals. We understand you may have questions as we move through the transfer process. Along with TIS, we will continue to keep you updated with all the latest news and updates via:

[www.faifleyha.co.uk](http://www.faifleyha.co.uk)

@FaifleyHA

Transfer News

We would actively encourage you to take part in our Transfer Focus Group meetings. The next meetings will be held in October – look out for information that we will send out on these. Please let us know you would like to be there – just contact us via:

[transfer@faifleyha.co.uk](mailto:transfer@faifleyha.co.uk)

@FaifleyHA

01389 877924

Lastly please use the above contact details to get in touch with any comments, questions or queries you have about the Transfer of Engagements. You can also contact TIS with any questions or queries.



# Transfer News

EDITION 2



## 'Have Your Say' Survey Outcomes

We firstly asked about your views on the transfer priorities that had been established based on initial tenant feedback. By way of reminder these were:

- ✓ Keeping rents affordable
- ✓ Investment in homes (kitchen, bathrooms etc)
- ✓ Improving the environment (managing the area, fencing etc)
- ✓ Modernising the service (better payment options, on-line services)
- ✓ Being more than just a good landlord (wider role services)
- ✓ Accessible local services

## What You Told Us – Your Survey Feedback

A total of 58 responses were received to the survey – 28 of these were through the online survey, demonstrating a good level of digital engagement.

From the survey results, it is clear that the majority of tenants and factoring service customers who responded, 84% felt that the transfer priorities reflect what they think are the most important priorities.

A range of comments were included in the completed feedback forms and some headlines were:

*“Keep rents fair”*

*“Maintaining properties is a high priority”*

*“Support to get online”*

*“Better green walking areas”*

## Wider Role Services

We asked what you wanted to see in terms of additional services from your landlord. There was strong support for financial services (welfare benefits, fuel

advice) and support to get residents online. Community engagement activities (youth services, support for the elderly) and estate walkabouts were also suggested.

## Future Service Access Options

The majority of tenants and factoring service customers preferred future contact option was by phone 39 (67.24%). 18 (31.3%) preferred online communication and 19 (32.76%) visiting the office. Just 10 (17.24%) preferred communication to be in person in their home.

Set against this response and the covid situation over the past 18 months, access to a local office was still seen as 'very important' to the majority of respondents (55%) with a further 19% stating it was 'fairly important'.

## Tenant Involvement and Shaping Plans

The majority of residents who responded (47%) favoured tenant/resident surveys as a way of engaging with tenants and factoring service customers. 38.6% supported a new local tenant/resident group being set up and 33.33% supported online feedback or service specific drop in/out options.

We were really pleased that 16 customers said they would be interested in joining a Focus Group to work with us on shaping the transfer plans.

*We want to express our thanks to everyone who took the time to complete the survey – it is very much appreciated. Your responses have been considered in detail by our Management Committee and have been a key element in the development of the Transfer Business Case that we have been working on over the past two months.*

## New Faifley Focus Groups – Update from first meetings

On the back of the survey, we held our first focus group meetings on 1st September. We held a day and evening session to maximise attendance. The Focus Groups will be our sounding board of local residents to help shape the transfer plans. The discussions at the meetings were very helpful, productive and insightful. Here is a summary of what tenants said.

### What are tenants' thoughts on the transfer?

- There is concern that rents are too high and not providing value for money, so change is needed.
- There was support for a transfer to Caledonia to get more affordable rents and investment carried out sooner.
- It is important that guarantees are in place to ensure the tenant promises that are offered will be delivered if the transfer goes ahead.
- It will be important to have a local resident's group if the transfer goes ahead.

### Are you happy with the priorities that have been identified for the proposed transfer?

Yes, there is support for the priorities set by the Management Committee and the top priorities were seen as:

- Affordable rents (support for a rent guarantee).
- New kitchens and bathrooms to be in place as soon as possible.
- Improving the wider environment.
- More facilities for young people e.g., community and play facilities.

We will be having our second set of Focus Group meetings in October to present the emerging offer from Caledonia. If you would like to join the Focus Groups, please contact TIS on 0800 488 0982 or just speak to one of the local team.

## Progress Update on the Transfer plans

Over the last few months, we have been working closely with Caledonia on various key transfer tasks:

- Reviewing the outcomes of the survey and feedback from the new Focus Groups to ensure tenants and residents views are shaping the transfer plans.
- Carrying out necessary legal and financial due diligence checks on Faifley and Caledonia to make

sure that both organisations understand each other and confirm that there are no issues that would stop the transfer proceeding.

- Developing the joint Transfer Business Case that will include that package of transfer benefits that Caledonia are committing to if the transfer proceeds and how these will be paid for.

## The Transfer Business Case

The Transfer Business Case is a very important document for us. Within this, we take the initial partnership submission from Caledonia and develop this into a detailed set of transfer promises that will be delivered if Faifley tenants support the transfer taking place. We have been working very hard with Caledonia to develop a detailed business case spelling out what the transfer would mean for you in terms of promises from Caledonia; based on the feedback you have given us so far. The Business Case will also clearly set out what happens if the transfer does not take place. This will allow tenants to make a clear choice when the time comes for formal consultation and the tenant ballot.

Over the course of late September / early October Faifley's Management Committee and Caledonia's Management Board will carry out an initial review of

the Business Case. We then hope that both governing bodies will then give their formal approval to the Business Case at their meetings in late October.

An independent assessment of the Business Case will also be carried out by TIS on behalf of Faifley's tenants. This aims to ensure that all the tenant promises being proposed are in line with what tenants want and can be paid for if the transfer goes ahead. If you have any questions about the proposal, please call TIS on their Freephone number 0800 488 0982 (which is available during office hours).

The Scottish Housing Regulator will also review the Business Case, with the aim of ensuring that the transfer proposal is in the best interests of Faifley's tenants and factoring service customers.

## What Happens Next

We are making good progress so far and with your help, we have been able to identify clear transfer priorities to build into the business case. Our joint teams are working hard 'behind the scenes' to complete the due diligence requirements and finalise the business case. Completing this work will enable us to move to the next stage - consulting formally with tenants on the transfer proposal.

Over the coming period, we will continue to keep you updated on progress and have noted below the key milestones for our Transfer of Engagements plan:

October 2021	Second round of Transfer Focus Group Meetings to hear the emerging offer from Caledonia
October 2021	Faifley and Caledonia's governing bodies consider and approve the final Transfer Business Case and the detailed offer for Faifley's tenants contained within this. The Business Case is also reviewed by TIS and also the Scottish Housing Regulator (SHR) to ensure they're happy that current and future tenants' interests are protected.
November 2021	Stage 1 of the Formal Tenant Consultation begins. This will start with a Notice issued to all tenants (and copied to factored owners and shareholding members) with all the information you will need about the transfer process. We will also begin visits to tenants and hold local meetings to discuss the transfer (following covid guidelines at all times).
December 2021	Faifley's Management Committee and Caledonia's Board consider the Stage 1 feedback. Provided this is very positive, a Stage 2 Notice is sent to all tenants (and copied to factored owners and shareholding members) to advise on the outcome of Stage 1, any changes to the plans as a result and to advise that the tenant ballot will be called.
January 2022	Tenant Ballot on the Transfer of Engagements – this is when every tenant gets to vote on the transfer proposal. Like Stage 1, we will visit all tenants to ensure everyone casts their vote and has their say in the very important decisions (following covid guidelines at all times). We will seek a high turnout in the ballot and a big YES vote to support the transfer proceedings.
Feb / March 2022	If the ballot is positive, we then need shareholding members of Faifley to play their part by attending and voting in favour of the transfer at two Special General Meetings that are required by law.
1 April 2022	If shareholders support the transfer at the SGMs, we register the transfer with the Financial Conduct Authority (FCA) and the Transfer of Engagements to Caledonia goes live.