

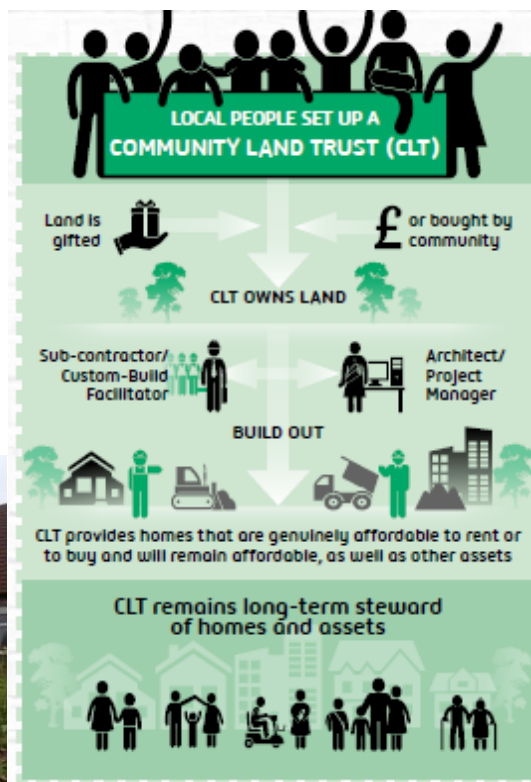


REVIEW OF THE URBAN COMMUNITY LAND TRUSTS PROJECT

SURVEY REPORT

David Mullins and Bingzi He

November 2017



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HEADLINE FINDINGS

HOUSING IMPACTS

1. UCLTs have completed a total of at least 72 homes, 51 of which are now occupied, with planning permissions already secured for 50 and applied for to build a further 26. This includes the first 20 urban housing co-operative homes completed in Wales by West Rhyl CLT.
2. Around 250 homes currently at pre-development stage are expected to be completed in the next few years giving nearly 400 anticipated UCLT housing completions overall.
3. This is a significant figure given the current national CLT stock of around 700. The larger average size of the UCLTs will help to rapidly increase the scale of the sector.
4. Two thirds of the proposed homes are for rent. 184 homes are for forms of homes ownership including 28 limited equity, 80 shared equity and 60 with resale conditions.
5. UCLTs will retain the freehold of sold units in line with the core principles of the Community Land Trust model.
6. Early evidence suggests that urban CLTs are succeeding in providing relatively affordable homes in inflated home ownership and rental markets and are intending to focus access on local people with relatively low household incomes.
7. Nine in ten projects propose some form of local residence requirements to ensure that housing developed responds to local community needs. Two thirds also plan to recognise local community contributions enabling localised housing provision to enhance local engagement and thereby strengthen civil society.

WIDER COMMUNITY IMPACTS

8. UCLTs have had a significant impact on volunteering (307 volunteer opportunities) and a modest but important impact on employment (at least 54 posts) – a very significant human impact!
9. UCLTs often own or lease non-housing assets such as shops, neighbourhood facilities and green spaces (Heart of Hastings was even planning to acquire the freehold of a derelict power station). This shows a willingness to set boundaries much wider than conventional housing programmes in order to respond to local community priorities.
10. Early community impacts include bringing communities together, increasing their voice in local decisions, increasing awareness and understanding of housing issues such as gentrification and giving a sense of hope. This has included early success in a campaign to prevent demolition of existing social housing in West Ken Gibbs Green.
11. Tangible symbols of impact have included the first high street Credit Union branch in Taunton, saving the HomeBaked bakery building from demolition in Anfield and the Turner Prize award to Granby 4 Streets in Toxteth.

SOURCES OF FINANCE

12. In excess of £2.1 million revenue grant funding was secured to add to the £10,000 UCLTP grant received by 19 projects; a leverage ratio of over 17:1. Revenue grants have come predominantly from Charitable Foundations and from Central Government
13. Nearly £4million has been raised for capital expenditure. There is a much greater use of community finance and social investors than would be found in the mainstream housing sector. In Leeds *'The success of the community share offer offered a different vision of how we can create the homes we need in Leeds, through the creation of what we called People Powered Homes'*.
14. Only two survey respondents indicated that they were registered providers and only one currently had a formal partnership with a registered provider. This is surprising given that a major aim of most UCLTs is to develop or refurbish homes for low income households, and this would benefit from registered provider status to access grant.

BENEFITS OF TAKING PART IN UCLT PROGRAMME

15. Participants had valued the wider support provided through the UCLTP programme especially peer networking opportunities, building capacity and confidence and raising profile with other key players (e.g. local authorities). Almost all had found the NCLTN helpful especially in relation to national lobbying and support.
16. However, while the £10,000 grant was the most important reason for taking part in UCLTP, advice on accessing other sources of finance was the least important.
17. If projects had not received the £10,000 grant there would have been a variety of adverse consequences in relation to staffing and foregone expenditure on professional services, legal advice, pre-development work, share issues etc. This would have caused delays and in some cases total abandonment of the CLT initiative.

GOVERNANCE

18. Community Benefit Society is easily the most popular legal form among Urban CLTs, accounting for over half of all responses. 3 are Community Interest Companies (CICs) and there is just one Registered Charity and one Company Limited by Guarantee.
19. The two predominant groups on UCLT boards are residents of the wider local community and independent experts. There is a smaller representation of third sector organisations and local authority representatives.
20. Chairs of the UCLTs are particularly likely to be local residents. This is important for the local accountability and legitimacy and sets UCLTs apart from most social and commercial housing providers. It suggests that UCLTs are enabling local residents to exert greater control over local land use and housing for their community.
21. A key early achievement of UCLTs has been to recruit broad based memberships. Only two UCLTs appear to have coterminous boards and memberships.
22. 15 responding UCLTs have between them recruited a remarkable total of 5295 ordinary members. London CLT with its connections to Citizens UK has 2600 ordinary members, Naked House has 800, West Ken Gibbs Green Community Homes 587, Bristol CLT 470 and Leeds Community Homes has around 275, boosted by their community share issue.

CONCLUSIONS: SURVEY CONTRIBUTION TO REVIEW OF UCLT AIMS

NCLTN set the following aims for the UCLT Programme:

- To establish 20 demonstration CLTs in a range of urban contexts and support their successful delivery of affordable housing schemes.
- To increase awareness of the role that CLTs can play in meeting the need for affordable housing among city leaders and policymakers.
- To increase community capacity among urban CLTs, including their campaigning capabilities and impact.
- To increase the public profile of urban CLTs.

Overall this report indicates that the UCLT programme has largely met these stated objectives. Evidence is provided of the impact of 16 of the demonstration CLTs in a range of urban contexts and the value of the support provided by UCTLP in their successful delivery of affordable housing schemes. There is a pipeline of new affordable homes in place which is significant in scale in relation to the largely rural CLT activity to date.

The survey itself has not provided direct evidence of the increased awareness of the role that CLTs can play in meeting the need for affordable housing among city leaders and policymakers. However there are a number of indirect indicators of this including local authority funding, particularly through the Community Housing Fund, the growth in asset transfers and the value of explicit local authority policies on this as in Liverpool. The apparent ability of urban CLTs to secure land for new build schemes in urban areas is another indicator of successful engagement with local authority planners; new build schemes account for the vast majority of the programme.

There is clear evidence of an increased community capacity among urban CLTs, including their campaigning capabilities and impact. The level of civil society participation in their membership and governance sets most UCLTs apart from other types of housing body. UCLTs are frequently described as building community understanding of housing issues and giving a sense of hope. Campaigning capabilities are apparent across the case studies but no more so than at West Ken Gibbs Green Community Homes which has seen remarkable success to date in resisting proposed demolitions of social housing.

While again this survey is not a primary evidence source on public profile of UCLTs, there can be little doubt that slowly and surely the emergence of the UCLTs is increasing the public profile of the sector. CLTs are no longer likely to be seen as a small scale rural phenomenon but as part of a core civil society response to the dysfunctions of the housing system, successfully challenging destructive practices and actively modelling alternatives that meet community needs by drawing the boundaries well beyond housing production to include community assets and organisation.

CONTENTS

HEADLINE FINDINGS	1
HOUSING IMPACTS	1
WIDER COMMUNITY IMPACTS	1
SOURCES OF FINANCE.....	2
BENEFITS OF TAKING PART IN UCLT PROGRAMME.....	2
GOVERNANCE	2
CONCLUSIONS: SURVEY CONTRIBUTION TO REVIEW OF UCLT AIMS	3
Acknowledgements.....	5
Introduction	6
About the UCLT Programme and Review Project.....	6
UCLTP Participants	7
Survey Respondents.....	7
The UCLT Grant.....	8
Immediate Housing Impacts	10
New Homes Planned and Built	10
Planning Permissions	10
Pre-Development Activity	10
New Build or Refurbishment?.....	11
Tenure.....	11
Cost to Residents	12
Rents	13
Sale Prices	13
Income Limits.....	14
Local Connections	14
Early Housing Impacts: Summary	16
Immediate Wider Community Impacts	17
Non-Housing Assets	17
Staff, Apprentices and Volunteers	17
Other Impacts on the Local Community	18
Longer Term Impacts Anticipated	20
Longer Term Housing Impacts	20
Longer term community impacts.....	21
Vision for 2024	22

Sources of Funding	23
Revenue Grants.....	23
Capital Funding	24
Asset transfers	26
Benefits of taking part in UCLT programme	27
Governance	31
Legal Form.....	31
Board Membership	32
Wider Membership and Recruitment.....	34
Membership Fees	36
Conclusions	36

Acknowledgements

We would like to thank Tom Chance and the National Community Land Trust Network for sponsoring and supporting the smooth running of the survey. We give particular thanks to the 16 busy people who took time out to complete the on-line survey and share some of the inspiring experiences reported here. Thank you to Alex Lawrie, Bridget Petty, Carolyn Starr, Charlie Fisher, Fiona Davies, Hannah Emery-Wright, Jess Steele, John Stockdale, Jonathan Rosenberg, Lisa Denison, Loic Rich, Neil Double, Peter Clarke, Rebecca Lawlor, Rob Greenland and Rosemary Aitchison.

David Mullins and Bingzi He, November 2017

Introduction

About the UCLT Programme and Review Project

The National CLT Network (NCLTN) is the official charity supporting Community Land Trusts in England and Wales. In 2014 NCLTN set up the Urban CLT Project (UCLTP), funded by the Oak Foundation, to help CLTs flourish in cities across England and Wales. This project initially supported 20 demonstration schemes to take their projects forward with grants of up to £10,000 to help with such costs as legal fees, community engagement, business planning, support with negotiating with local authorities and finding a development partner. NCLT also provided some training, a peer-to-peer residential learning event, and other resources.

The project's key objectives were:

- To establish 20 demonstration CLTs in a range of urban contexts and support their successful delivery of affordable housing schemes.
- To increase awareness of the role that CLTs can play in meeting the need for affordable housing among city leaders and policymakers.
- To increase community capacity among urban CLTs, including their campaigning capabilities and impact.
- To increase the public profile of urban CLTs.

In July 2017 NCLT invited tenders for a research project to review and evaluate the extent to which the UCLT project has achieved its objectives and what implications the findings have for the future work of the National CLT Network. A consortium led by Tom Moore at the University of Sheffield tendered successfully for this review and has undertaken national stakeholder interviews, an on-line survey and five local case studies between October and December 2017. This report summarises the findings of the on-line survey undertaken by David Mullins with Bingzi He (University of Birmingham). It is produced in advance of the case study work with which it will be combined in a final review report to NCLTN in early 2018. Views of participants will be sought so that these can add insights to our interpretation of survey results in the final review report.

The survey is the first survey of Urban CLTs in England and Wales. It provides a rich picture of a newly forming sector that provides a distinctive and innovative approach to tackling a range of urban housing issues. The survey has captured the earliest years and tracked the impact of a grant programme established by NCLT to extend the reach of CLTs into the urban centres

The main issues covered by the survey are

- UCLT programme participants
- The UCLT grant and benefits of taking part in the programme
- Immediate Housing impacts of the programme
- Immediate Wider impacts of the programme
- Longer Term Impacts Anticipated
- Sources of Funding
- Governance
- Conclusions

The survey was administered on-line using the BOS survey package. Basic summary results reports were produced in October 2017 for NCLT and the research team involved in the case studies. This interpretive report is based on further analysis of numerical responses making reference to external and contextual sources and an analysis of write-in responses to identify themes and patterns.

UCLTP Participants

Of the original 20 participants in the programme, 19 were operational at the time of this survey in September 2017. The programme achieved a wide geographical coverage including a majority in hot housing markets in London and the South (albeit some in deprived urban areas within these markets) and a minority in more troubled markets in northern cities and Wales.

REGION	NUMBER	UCLTP Participants
South West	4	Somerset Co-operative CLT, Bristol CLT, Ambition Lawrence Weston and Truro CLT
South East	4	Lewes CLT, Brighton and Hove CLT, Heart of Hastings CLT, Oxfordshire CLT
London	4	West Ken Gibbs Green Community Homes, Naked House, London CLT, Brixton Green CLT
East	2	Thrift CLT for Soham, Lincoln
North West	2	HomeBaked, Granby 4 Streets
NE/Yorkshire	2	Leeds Community Homes, Middlesbrough CLT
Wales	1	West Rhyl CLT

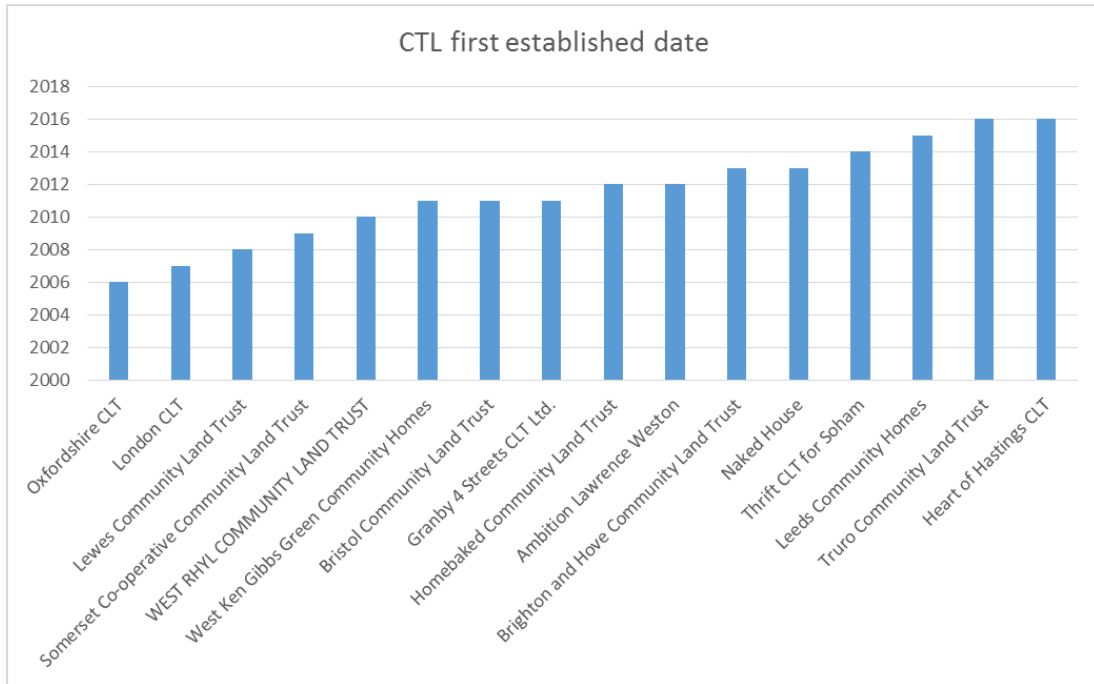
The three UCLT projects not responding to the survey were Brixton Green in London, Lincoln in the East Region and Middlesbrough in the North East.

Survey Respondents

16 of 19 UCLTs responded by deadline, an excellent response rate of 84%.

The survey was completed by a range of people; 10 of whom could be loosely categorised as executives (director, community organiser etc.) and 6 non-executives (board/committee members/secretary/treasurer).

Most UCLTs responding had been formally established as CLTs quite recently; 4 in the last two years (since the start of the programme); 4 between two and five years ago; three between 5 and 7 years ago and 4 before 2010. The oldest, Oxfordshire CLT, was established nine years ago, while two of the most recently formed, Truro Community Land Trust and Heart of Hastings CLT were established just one year ago.

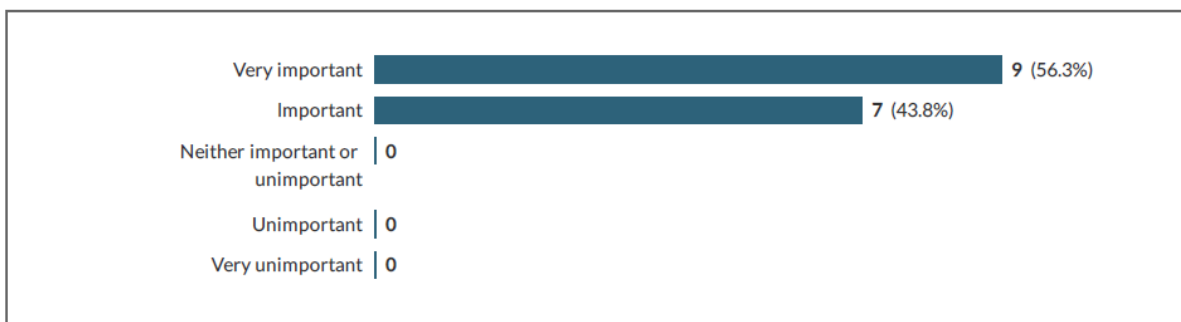


The UCLT Grant

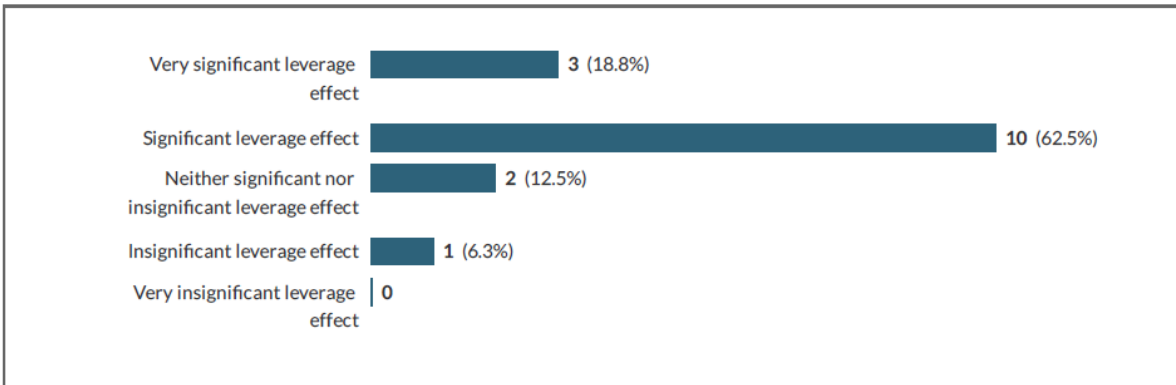
All respondents' organisations had been in receipt of the £10,000 start-up grant from National CLT Network from 2014. The survey began by assessing respondents' views of the importance and use of the grant.

All respondents stated that the £10,000 grant was important to their project, with just over a half seeing it as very important and just under a half as quite important

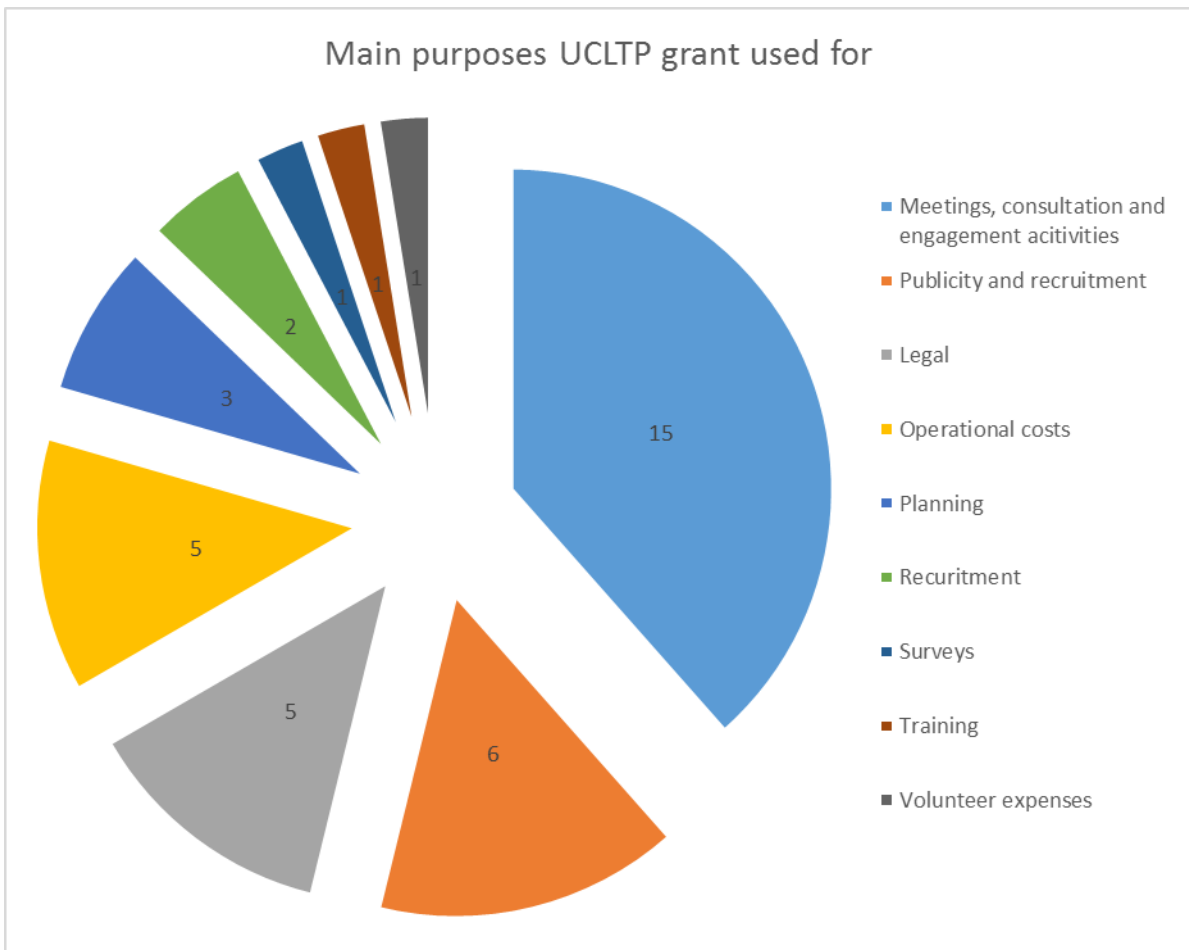
How important was the initial £10,000 grant provided to you through the UCLTP?



80% considered that the grant had a significant leverage effect (including 20% very significant). Later in the report we look at the leverage associated with this relatively small grant. Data collected shows that total revenue funding secured was equivalent to 19 times the ULCT grants, while capital funding was more substantial still. Thus it appears that the ULCT grant performed an important function in persuading other funders that these are credible projects worthy of financial support.



The grant was used for a variety of purposes. Respondents were asked to name up to 5 purposes. The most commonly mentioned purposes, (amongst the 39 named) were meetings, consultation and engagement, publicity and recruitment, legal expenses and operational costs. Several projects used some of the grant for project management activities either by employing coordinators or external consultants.



There is a close correspondence between these reported uses of the grant and the stated aims of the programme ‘to help with such costs as legal fees, community engagement, business planning, support with negotiating with local authorities and finding a development partner’.

Immediate Housing Impacts

New Homes Planned and Built

A series of questions provide a picture of the numbers of new homes planned by respondent organisations, the current stage of development, the balance between new build and refurbishment and the expected tenure mix. Responses to these questions varied between 6 and 13 and these variations partly explain the different estimates of total numbers of homes planned.

Homes Completed The firmest data from the survey relates to completed and occupied homes. We can be confident that **8 of the 16 projects have completed a total of at least 72 homes, 51 of which are already occupied.** The first four completed schemes were at Bristol CLT, London CLT, Granby 4 Streets and West Rhyl CLT. The latter comprise the first 20 urban housing co-operative homes completed in Wales.

Planning Permissions

Results for the development pipeline indicate that planning permission has been secured for a further 50 homes from 9 projects; Planning permission has also been applied for a further 26 homes from 7 projects. **Thus there is strong potential for a further 76 homes to be completed over the next few years giving an overall total of 148 completions.**

Pre-Development Activity

Estimates based on projects currently in pre-development phase and awaiting planning permission

There is greater uncertainty about the figure for numbers of homes in the pre-development phase. 13 respondents report a total of 461 homes planned but currently at pre-development stage. 250 of these are accounted for by one organisation, West Ken Gibbs Green Community Homes, that is known to be at a very early stage of developing an alternative plan to challenge a proposed social housing demolition and area regeneration project using the 'right to transfer'. On the other hand three projects did not answer the question on pre-development stage, three answered but had no planned homes at this stage and one stated that 'the exact number is undecided at present'; and one substantial project, Brixton Green CLT did not complete the survey.

Our cautious estimate would be that around 252 proposed homes at pre-development stage will be completed in the next few years giving an overall estimate nearly 400 completions from the Urban CLTs early activity.

Stage of Development process	Reported number of homes	number of respondents
In a pre-development phase	252	13
Awaiting planning permission	26	7
With planning permission/in development	50	9
Completed	21	6
Occupied	51	8
TOTAL	400	

This total is significant given that the total existing CLT stock from mainly rural schemes is just over 700. The size of the ULCT proposed developments is generally larger than the rural CLTs with a range from between 10 and 50 homes proposed by each UCLTs in the programme, and an average size of around 27 homes (sometimes on more than one site). This compares with between 6 and 10 homes in a typical rural CLT. The UCLT programme is therefore making a very important contribution to the future growth of the CLT sector in England.

New Build or Refurbishment?

There was a more complete response when respondents were asked to differentiate between the type of development planned, i.e. new build or refurbished homes. New build was generally the preferred option. 15 schemes currently plan to deliver a total of 530 new build homes. Meanwhile 8 projects expect to deliver a total of 52 refurbished homes. In addition one project (Homebaked) was seeking permission to refurbish 9 existing houses rather than building 24 new flats. This would marginally change the overall mix across the UCLT programme as shown in the second pie chart below. In Urban CLTs, refurbishing existing stock can sometimes provide an attractive and speedier option than new build. This is particularly attractive in areas where local residents are campaigning against demolitions and blight. On the other had the ability to secure land for new build in the urban areas has clearly been demonstrated by the UCLTs choosing the new build option.

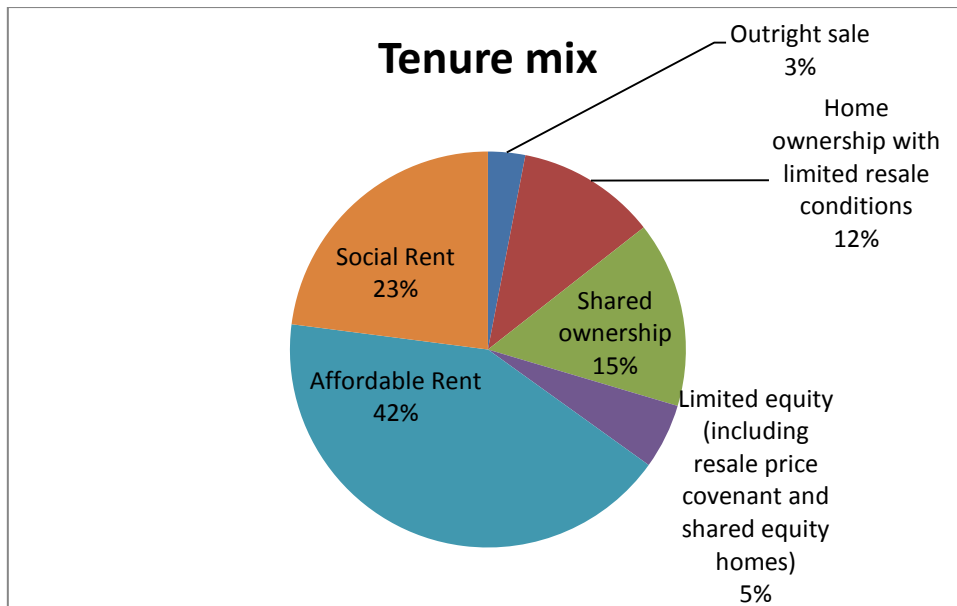


Tenure

Questions on proposed tenure mix drew a lower response, partly because it can be difficult to reach firm decisions until later stages of the development process. However, it is clear that there is a predominance of rented homes while a substantial minority are for several home ownership types.

Two thirds of the proposed homes were for rent. Just over two thirds of these were for affordable rent whereas just a third was for social rent. While the questionnaire did not refer to HCA definitions of affordable rent as ‘up to 80% market rent’ used for new grant funded schemes, it is likely that proposed social rents were considerably lower than this level. 100 of the proposed 121 social rent homes were proposed by one project (West Ken Gibbs Green Community Homes) which as noted above was at an early stage of proposing a challenge to demolition of existing social housing, and therefore placed a strong emphasis on new social rent homes.

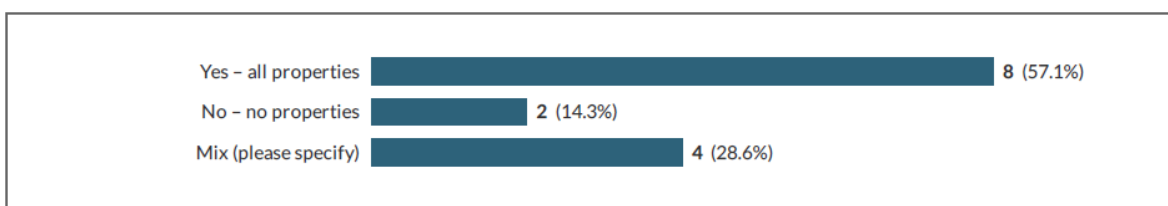
Only one project (Oxfordshire) was planning outright sale (16 homes). However, a total of 184 homes across the programme were for forms of homes ownership including 28 limited equity, 80 shared equity and 60 with resale conditions. No projects reported that they were proposing to use the mutual home ownership model.



A further question confirmed that the CLTs generally planned to retain the freehold of sold units in line with the core principles of the Community Land Trust model to control future use by retaining control of the land. NCLTN has recently been active in highlighting the risks to the CLT model of proposed reforms to the leasehold tenure for new build houses. *‘These proposals could have a significant impact on community land trusts, at the very moment the community-led housing sector stands ready for rapid growth. Leasehold is commonly used by CLTs, as a means of ensuring that new homes remain permanently affordable for their local communities’.*

<http://www.communitylandtrusts.org.uk/article/2017/7/25/government-consultation-on-major-reforms-to-leasehold-housing>

Will the CLT retain the freeholds of any properties sold and lease properties to residents?



Cost to Residents

Estimates of rents and sale prices were limited given the early stage in the development pipeline of most reported projects. There was even more limited evidence on income limits and how they would be applied in practice.

Nevertheless the early evidence suggests that urban CLTs are succeeding in providing relatively affordable homes in inflated property and rental markets and are intending to focus access on local people with relatively low household incomes.

Rents

Estimates of rents were provided for 142 of the 343 proposed rented properties. Clearly this is a very limited sample and there were substantial regional variations. The table below shows the reported rents by scheme and region and the number of properties in which the averages are based. It can be seen that average rents were generally lower in Wales and the North and higher in the south, but relatively low rents were also anticipated in Somerset and for one bedroom homes in Hastings.

Only Granby 4 Streets had set a specific maximum household income to be eligible for rented homes and this was £26,000).

Project	Region	1BED	2BED	3BED	4BED
West Rhyl	Wales	360 (2)	400 (4)	525 (13)	550 (1)
Homebaked	NW	250 (4)			
Granby 4 Streets	NW		525 (5)		
Leeds Community	Yorkshire & Humberside	352 (6)	424 (3)		
Thrift for Soham	E	408 (6)	560 (2)		
Somerset CLT	SW	325 (10)	390 (10)		
Lewes CLT	SE		800 (6)		
Heart of Hastings	SE	390 (30)	675 (34)		
Oxfordshire CLT	SE	689 (4)	834 (2)		

Key: first numbers refer to average monthly rent in £s in 2017 or the first year of intended occupancy if later, second number (in brackets) refers to number of homes to which the average rent applies.

Sale Prices

Estimated full sale prices (including the value of any part rent share) were provided for 93 of the 184 planned home ownership properties, an even more limited sample and again there were quite big variations, partly accounted for by regional house price differences. The table below shows the reported full sale prices (including the full value of any part share) by scheme and region. The London CLT data is provided separately for properties in two distinct price bands (probably relating to two different sites).

Project	Region	1BED	2BED	3BED	4BED
Granby 4 Streets	NW		113,000 (6)		
Leeds Community	Yorkshire & Humberside	79,000 (5)	110,000 (2)		
Thrift for Soham	E		260,000 (2)		
Naked House	London	160,000 (10)	200,000 (7)	230,000 (5)	
London CLT	London	130,000 (5)	182,000 (12)	235,000 (6)	
London CLT	London	173,000 (5)	223,000 (6)		
Oxfordshire CLT	SE	304,000 (6)	409,000 (13)	426,000 (3)	

Key: the first numbers refer to average full sale price (including any part rent share), the second number (in brackets) refers to number of homes to which the average rent applies.

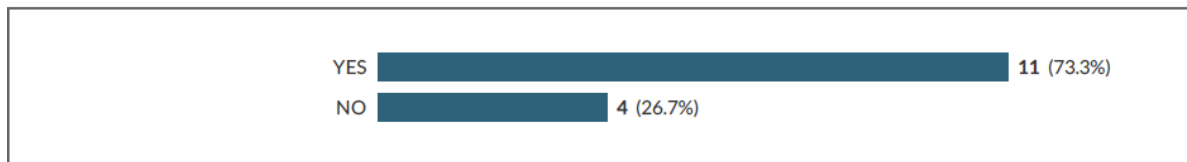
The table above shows the relatively more affordable prices achieved in Leeds and Liverpool where Granby 4 Streets intended to apply a household income limit of £26,000. There were also some quite low prices being achieved by the CLT model in London. The one bedroom homes at London CLT were intended for households with incomes below £26,000 whereas the three bedrooms had a maximum

income limit of £70,000. Also in London Naked House was planning to apply a household income limit of £90,000 to properties for sale at £230,000.

Income Limits

Almost three quarters of projects were proposing some form of household income restrictions to ensure that access was based on need. It is possible that the other cases have not yet made this decision because they are further away from completions, sales and lettings. 8 projects had not yet completed any properties.

Will there be any annual household income restrictions for allocation of CLT homes?



Very limited information was provided on how these limits would be specified. This data on income limits is discussed in relation to specific schemes and regions in the discussion of housing costs above.

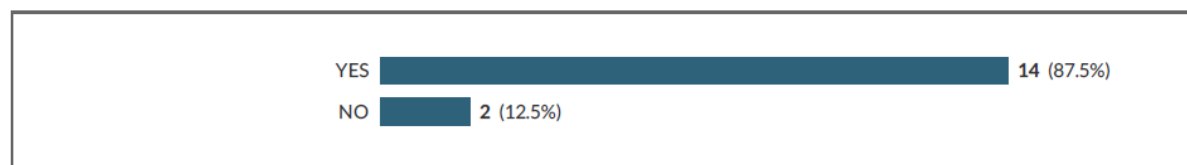
Only 2 of the 7 respondents to the question on income limits for rental homes gave specific caps; one was £26,000, the other was 'median Hastings earnings'.

5 of the 8 respondents to the question on income limits for home ownership gave specific answers. In one case the household income limit ranged from £26,000 for a one bed home to £70,000 for a three bed. Two cases set absolute income limits, one £26,000 the other £90,000. One case specified the 70th percentile of local earnings. A final case was considering a structure based on average local earnings.

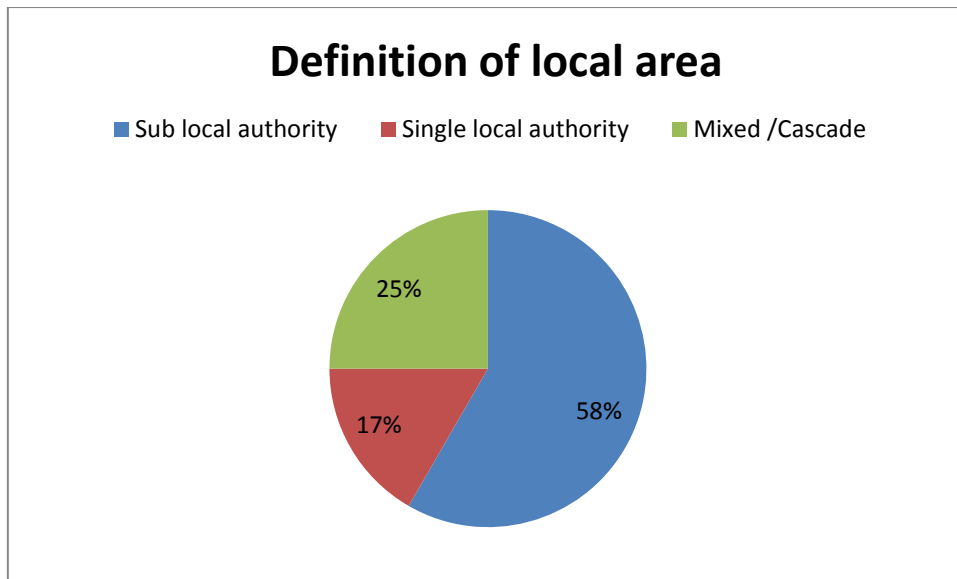
Local Connections

Almost nine in ten projects propose some form of local residence requirements to ensure that housing developed responds to local community needs.

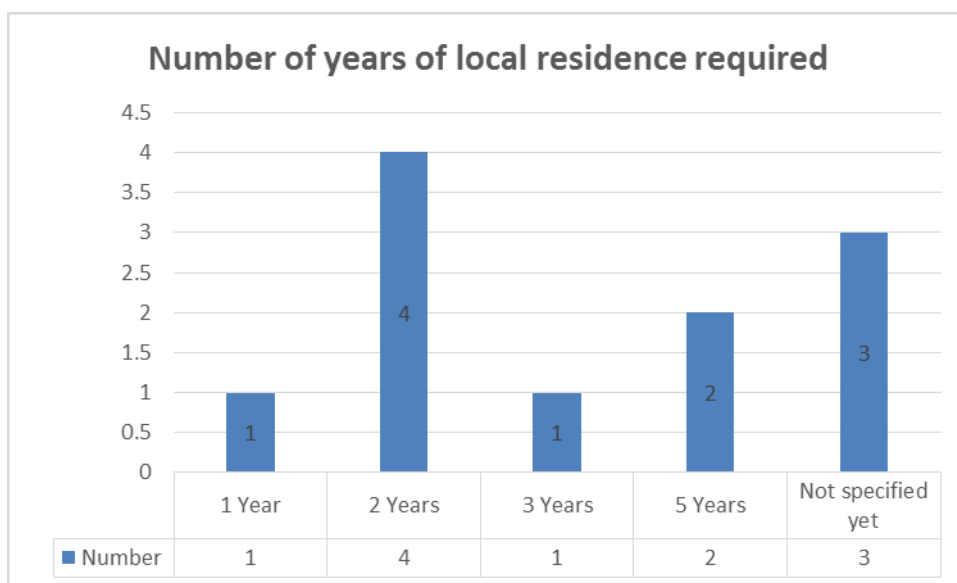
Will there be any local residence requirements for allocation of CLT homes?



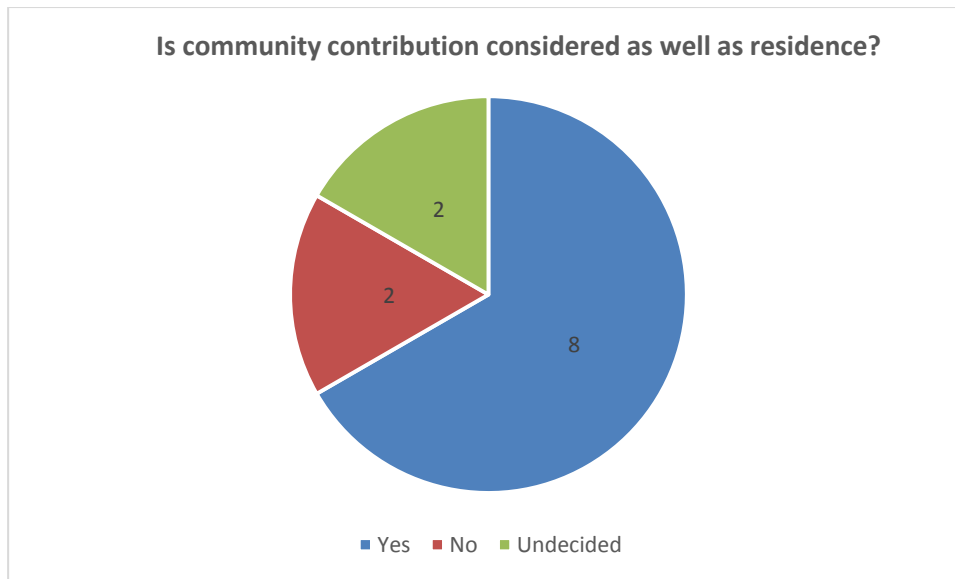
The definition of local area was explained by 13 respondents, and in most cases included a very local neighbourhood area. In 7 cases it was an area smaller than a local authority (e.g. a single town, postcode, ward or neighbourhood plan area or part of a city). In 2 cases it was set at local authority area. In three cases there was a mixed definition, allowing a 'cascade' from very local areas to whole authorities and in one case from parish to local authority and county level.



The length of local connection was explained in 12 cases. 5 years was the longest time specified (3 cases), with 3 years in one case, 2 years in three cases and 1 year in one case. Some indicated that these criteria would not be applied rigidly. In three cases the length of time was not yet specified.



We also asked whether **local community contribution** would be considered in addition to years of residence. 12 responded and 8 of these said that community contributions would be considered (for example by an allocations panel), 2 would not consider community contributions, while 2 had not yet decided. While the survey itself did not identify the types of community contribution made, it is important to recognise that **localised housing provision of this type can produce blended benefits to enhance local engagement and thereby strengthen civil society in urban areas.**



Early Housing Impacts: Summary

Respondents were asked to summarise the early housing impacts of their project. 6 of the 12 respondents answering the question said that there had been no housing impacts to date. This is unsurprising given the limited number of housing completions reported earlier.

However some important impacts were identified by the other respondents.

In two cases where housing was complete and occupied there were clear impacts:

The most important impact is that 23 families so far at St. Clement's have been able to stay in London where their livelihoods and networks are, where they would otherwise have been forced to choose between living in poor, insecure and over crowded accommodation or leaving the neighbourhood they call home. Brasted Close has not yet allocated homes. (London CLT)

Stable and affordable quality accommodation with excellent maintenance and repair provision (West Rhyl CLT)

Even where housing had not yet been constructed housing benefits included securing mortgages and completing deeds of covenant, employment impacts and in one case preventing the demolition of existing social housing.

In the one case the key early housing achievement of their CLT campaign against demolition of existing social housing in a high cost area was that:

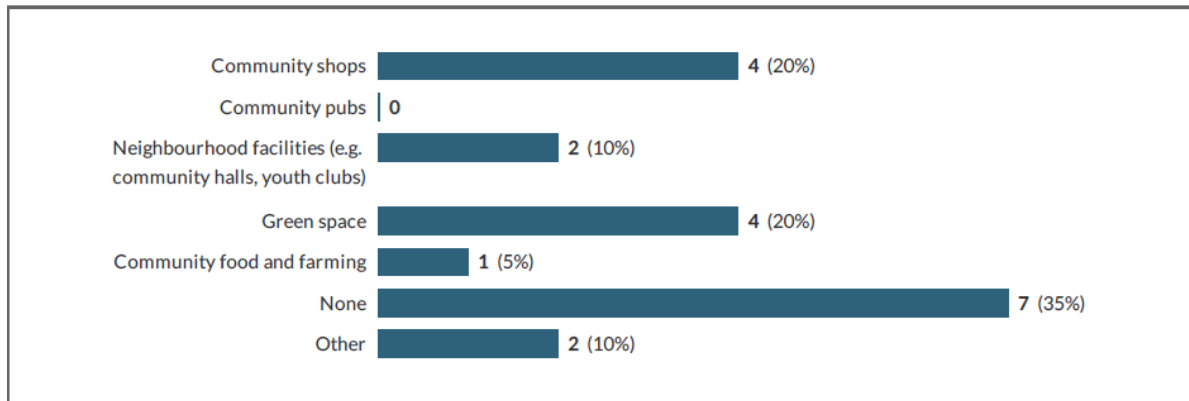
'The demolition scheme has not progressed'. (West Ken Gibbs Green Community Homes)

Immediate Wider Community Impacts

Non-Housing Assets

There were 11 examples of non-housing community assets owned or leased by CLTs. These included community shops, green spaces and neighbourhood facilities. This demonstrates the ability of community led projects such as UCLTs to set their boundaries much wider than conventional housing programmes in order to respond to local community priorities. In some cases it may also reflect the potential to cross subsidise housing purposes from community assets.

Does your CLT own or lease any non-housing community assets? (Tick any that apply)



The survey revealed some surprising examples of other assets owned or leased by CLTs. Granby 4 Streets holds a regular community street market as well as the local shops.

Heart of Hastings CLT was planning to acquire the freehold of a disused power station!

“To create a ‘nurturing neighbourhood with 60-70 homes, woodland, workspaces and community facilities”

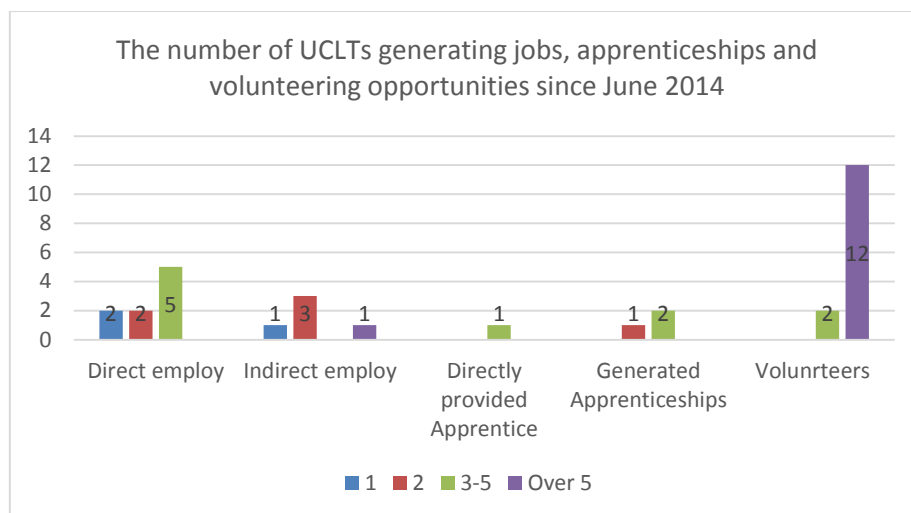
In a third example London CLT was exploring mixed use options around its housing sites.

St Clement's is fighting towards obtaining mixed-use community space including a cafe, rentable venue and exhibition space. Brasted Close is exploring a shared garden to integrate it into the existing estate.

Staff, Apprentices and Volunteers

The UCLTs have had a significant impact on volunteering and a modest but important impact on employment. To date very few apprenticeship opportunities have been created. Again this is unsurprising given the early stage of housing construction.

The graph shows the numbers of CLTs and the number of posts/volunteer positions (banded 1,2,3-5 and over 5).



Summarised in a different way the survey identifies a total of 25 paid staff employed direct by the CLTs, 19 further local jobs generated (including 12 bakery and farm jobs at Home Baked), 3 construction trainees directly employed by Homebaked and 7 local apprenticeships (5 at West Rhyl and 2 at Homebaked). **In sum this is an employment impact of at least 54 posts.**

The key impact on local people has been on volunteering. There are 146 volunteers involved in the governance of 14 CLTs and a further 161 volunteers other than in management and governance roles in 12 CLTs. **So there is a minimum of 307 volunteers are at the heart of the urban CLTs – a very significant human impact!**

Other Impacts on the Local Community

We asked respondents to summarise the most important impacts of their CLT to date. Only one respondent felt that there had been no impact to date, but another two did not complete this question.

The 13 write in responses (sometimes covering several themes) give a rich picture of the wide range of impacts and are therefore shown in full to illustrate the following themes

We can see from the responses that a strong theme has been **bringing communities together**, increasing their voice in local decisions, increasing awareness and understanding of housing issues such as gentrification and **giving a sense of hope**.

- *Holding the community together in the face of demolition and displacement (West Ken Gibbs Green Community Homes)*
- *Regeneration of area resulting in removal of HMO's, new communities established with bigger voice in local decision making (West Rhyl CLT)*
- *Giving a sense of hope to those unable to afford high prices and rents in the town (Lewes CLT)*
- *Increased level of awareness and understanding of community-led housing approaches (Brighton and Hove CLT)*
- *Bringing back a sense of pride and hope. (HomeBaked CLT)*

- *Raising the question of gentrification and the idea that there is something we can do about it. Raising the question of why large swathes of the poorest neighbourhood in Hastings have been left derelict and hoarded up for nearly 40 years.(Heart of Hastings CLT)*
- *we have formed a strong group of residents which has now become a steering group which will potentially lead on to the formation of a CLT once the overall model for the development has been agreed.(Ambition Lawrence Weston)*

External support has been harnessed in a variety of ways including a community share issue in Leeds, a Community Housing Fund bid in Oxfordshire and links with charities and local institutions in several cases.

- *Bringing in partners to match our investment up to £13 million to support wide scale regeneration of our community and neighbourhood.(Granby 4 Streets)*
- *The success of the community share offer offered a different vision of how we can create the homes we need in Leeds, through the creation of what we called People Powered Homes.(Leeds Community Homes)*
- *Brought together two other well-established charities to bid for Community Housing Fund and begin the creation of the Oxon Community Housing Hub. Fuelled the engagement of other coops and cohousing groups in the city.(Oxfordshire CLT)*
- *For the community in Lewisham, Brasted Close has created more links between local residents and institutions. It has brought them together to conceptualise what a positive development that contributes to the surrounding estate will look like.(London CLT)*
- *Ours is not really a 'local' community as BCLT is city wide. BCLT has ambitions to make major contributions to the supply of affordable housing across the city.(Bristol CLT)*

Tangible symbols of impact have included the first high street Credit Union branch in Taunton, saving the HomeBaked bakery building and public green space from demolition in Anfield and the Turner Prize aware to Granby 4 Streets.

- *A high street credit union branch for the first time in Taunton; access to advice for people forming and growing co-operatives.(Somerset Co-operative CLT)*
- *Saving a bakery building from demolition and providing the premises for a new community cooperative bakery to flourish. Saving a public green space. Providing jobs and training.(HomeBaked)*
- *Securing the Turner Art Prize.(Granby 4 Streets)*

Longer Term Impacts Anticipated

Given the early stage of the majority of projects, none had so far undertaken or commissioned work on their impact. It was therefore important to use this survey to gauge expected impacts over a realistic time period. We therefore chose the year 2024, 10 years on from the UCLT grants as the time horizon to ask about anticipated longer term housing and community impacts.

Longer Term Housing Impacts

An analysis of housing impact to date earlier in this report shows that 72 homes are already completed, 51 of which are occupied. A further 328 homes were reported to be at various stages of development and likely to be completed in the next few years.

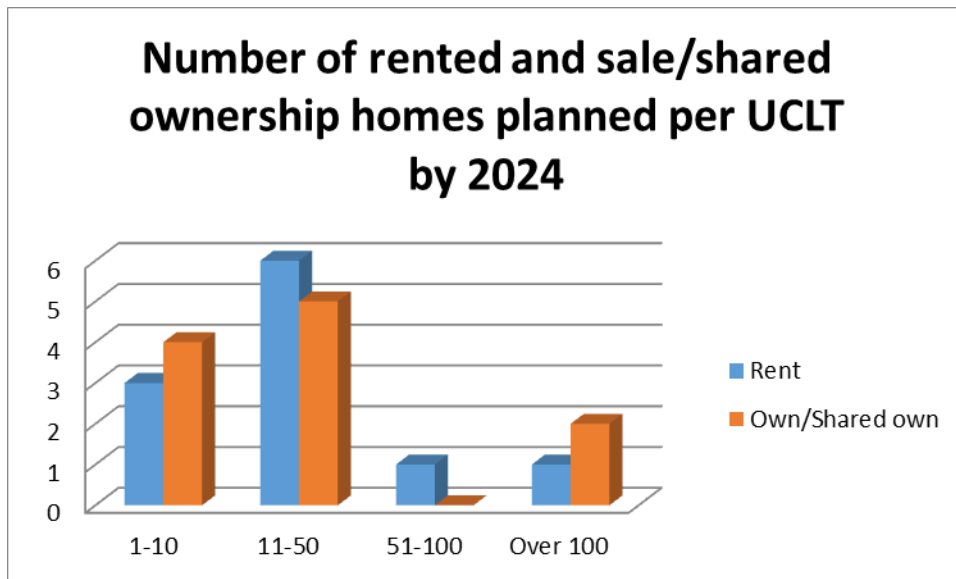
Taking things forward to 2024, 11 respondents were willing to make an estimate (in some cases highly qualified) of the total number of homes they hoped to complete for rent and for sale.

These estimates were for a total of 561 homes for rent and 621 for sale; suggesting that **the total homes for these CLTs by 2024 could be almost three times those currently expected to be completed in the next few years.**

The graph below shows the size (banded into four size bands) and tenure of proposed new homes by number of UCLTs (some UCLTs were planning just one tenure, others a mix of sale and rent). It can be seen that overall the UCLT programme participants are planning to develop between 11 and 50 rented homes and slightly fewer shared ownership homes. Some are planning considerably larger developments. These development plans will have a significant impact on the overall scale of the CLT sector in England since they would generally be larger than the existing mainly rural CLTs.

There is a tendency for the larger UCLTs to be planning a higher proportion of homes for sale or shared ownership. Oxfordshire and London CLTs together account for over 400 of the 600 homes anticipated that will be for sale.

As in the current pipeline figures above, the largest anticipated number of rented homes (200 of the 561 total) came from the West Ken Gibbs Green Community Homes estimate based on their 'people's plan' to challenge a current demolition and regeneration scheme by using the 'right to transfer' provisions of the Housing Act 1985. <https://westkengibbsgreen.wordpress.com/the-right-to-transfer-s34a/>. It is hoped that the campaign against demolition of existing social homes will succeed and that, following a successful right to transfer, progress will be made towards these new homes estimates by 2024.



Longer term community impacts

Longer term community impacts were again inferred from an open ended write in question to which 15 of the 16 participants responded.

These responses provide some exciting visions for the future of UCLTs in meeting local housing need, enacting wider visions of local community impacts and ambitions for organisational and sector development to sustain community-led housing models into the future.

A key theme related specifically to meeting local housing need

- *We will continue to create homes ourselves, and we will also support other people in Leeds to take control of meeting their housing needs.*
- *Providing a block of locally owned and controlled housing for local people.*
- *We expect 40 homes to have been built and these will have benefitted mainly local residents, offering them greater housing choice, more stability and a springboard for other opportunities for them and their families.*

A second theme related to wider vision and impacts for local communities

- *To gain control of our destiny*
- *We expect to be creating opportunities for people on low incomes to not only benefit from community enterprise, but also to be actively involved in directing it. We also expect to see mutual services like car sharing, credit union lending and local currencies.*
- *Creation of a new 'independent' High Street that uses the Bakery model of match day and tourist trade (we're opposite Liverpool Football Club) to cross-fund sales and keep prices affordable to local residents.*
- *We will have transformed the derelict power station site in the heart of Ore Valley into a 'nurturing neighbourhood' with 60-70 homes, workspaces, woodland and community facilities.*
- *Still act as a catalyst for bottom up regeneration. Being a sustainable organisation with a wide range of projects supporting our local community.*

A final theme related to ambitions for organisational and sector development and viable community led housing models for the future

- *By 2024 with multiple CLTs across London we hope to be in a better position to change policy around CLTs and have them recognised as a widespread affordable option in London.*
- *Working with partners, we will provide a range of models of community-led housing and support others to undertake projects.*
- *We will have brought properties into community freehold in the White Rock area and converted them to maximise affordable living and workspace, with capped rents.*
- *The hub will be fully sustainable through a service model delivering/enabling an average of 50 homes a year across the county.*
- *The CLT will have built credibility to help facilitate much-needed development on controversial Oxford fringe sites and be a partner in those large urban schemes.*
- *Mobilisation of community initiatives for community-led approaches to planning, housing and land use. To continue to develop the co-operative model and continue with regeneration of area and provision of affordable accommodation*

Vision for 2024

At the end of the survey we invited respondents to paint a word picture of what they hope to have achieved by 2024. These responses help to communicate the underlying vision of CLTs and their potential for a better society:

- *To have changed the area for the better*
- *Reductions in homelessness and an increase in community organising.*
- *Mobilisation of community initiatives for community-led approaches to planning, housing and land use. Implementation of community-led housing projects, greater public and council awareness of potential of community-led approaches,*
- *A thriving independent high street with a mix of shops and services for local residents as well as trading for match days and tourists. Good quality housing that remains affordable in perpetuity. Public open green spaces that are welcoming, cared for and well-used. Well paid jobs. Good quality training opportunities. Social interaction and inclusion. Growth in the local economy.*
- *Create long term affordable homes for rent with security of tenure in Truro.*
- *The CLT will be offering a major alternative to private speculative development. We will have created c.100 affordable homes, using selection criteria of NEED, ENTHUSIASM, CONTRIBUTION & LOCAL CONNECTION. The homes and workspaces will be 'community managed' and there will be a strong degree of mutual support - 'affordable spaces, diverse communities, inclusive neighbourhoods through socially driven investment and long-term co-ownership.*
- *Transitioned to a land-owning umbrella which has a strong network of consultants helping communities to develop homes in both urban neighbourhoods and villages. Will have successfully engaged the University colleges which are the largest land-owners and hold the biggest single potential for changing this over-heated housing market.*
- *To have spread CLTs to at least 6 boroughs in London, putting CLTs on the affordable housing agenda in multiple councils, thus giving more people the chance of homes they can afford.*

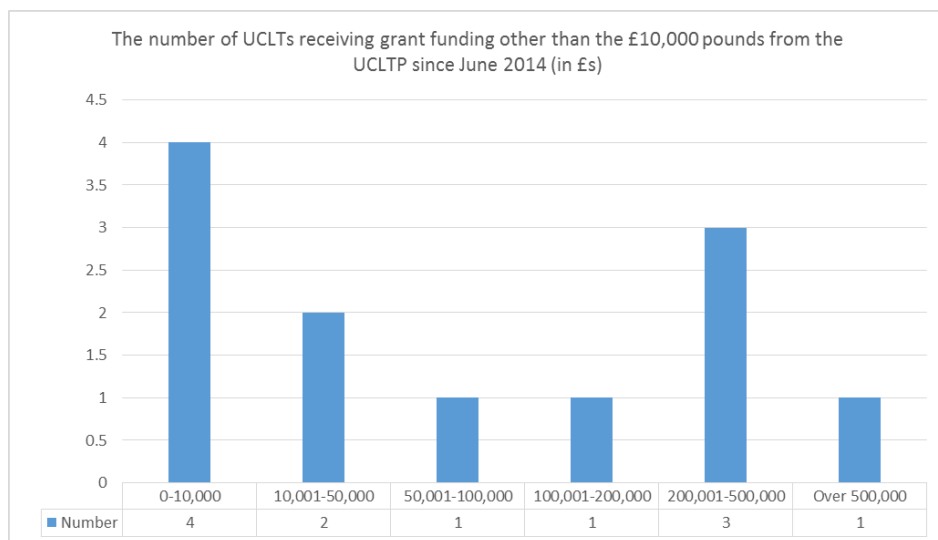
Sources of Funding

Revenue Grants

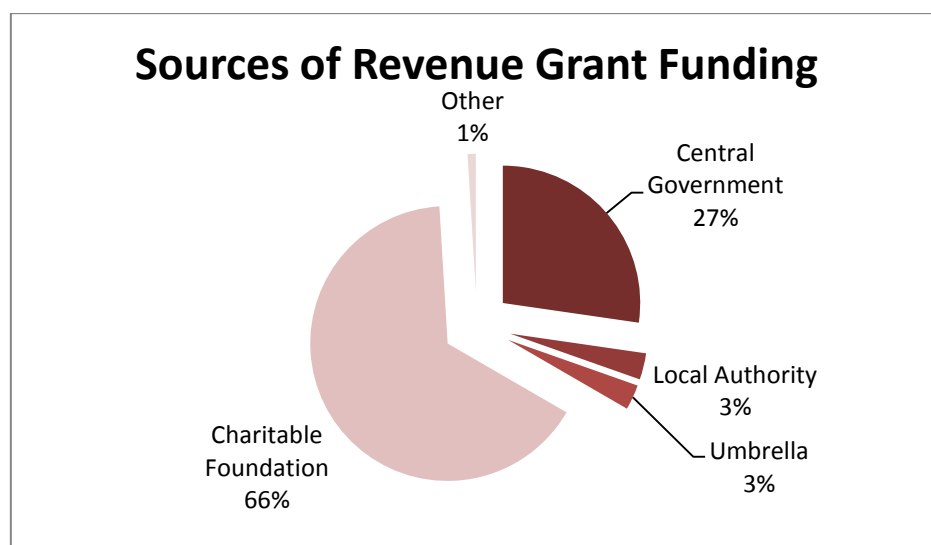
UCLTs were asked to provide information on the amount and sources of revenue grant funding secured other than the £10,000 UCLTP grant.

Responses from 12 projects indicate that **in excess of £2.1 million grant funding was secured** to add to the £120,000 UCLTP grant received by those projects. This and other evidence suggests that UCLT funding has been important in leveraging additional funding. We can estimate that UCLT money had a big leverage ratio on revenue funding of **17:1**.

Half of these 12 UCLTPs reported a total grant secured of under £50,000 but a few reported much higher totals. The four organisations reporting the largest grant totals (each in excess of £200,000) together accounted for 81% of the total grant secured.



Revenue grant funding came from a surprisingly narrow range of sources; **over 90% of it from either charitable foundations or central government**. Much smaller amounts came from local authorities, umbrella organisations and others.



Charitable foundations were easily the most significant source of grant funding accounting for 66% of the total and for most of the larger grants (e.g. £385,000 from Power to Change to Ganby 4 Streets). The largest foundation grant totals came from National Lottery (£828,000; £734,307 through Power to Change, £64,000 through Big Potential and £30,000 through Big Local), Nationwide Foundation (£145,000) and one unnamed Foundation who provided £370,000 to Granby 4 Streets.

The next most important source was **Central Government** accounting for 27% of the total, much of this coming via local authorities through 5 grants from the Community Housing Fund (which was another source of some of the larger grants e.g. £465,000 to Brighton and Hove CLT). £42,000 of the central government total came via the Homes and Communities Agency.

Other local authority grants were relatively small scale, 4 were £10,000 or less, the fifth was for £50,000 to Ambition Lawrence Weston.

Locality was the main umbrella organisation funder allocating a total of £45,000 between four projects. Citizens UK was another, allocating £17,000 to London CLT; while Coops UK granted £5000 to Heart of Hastings through its Community Economic Development Fund.

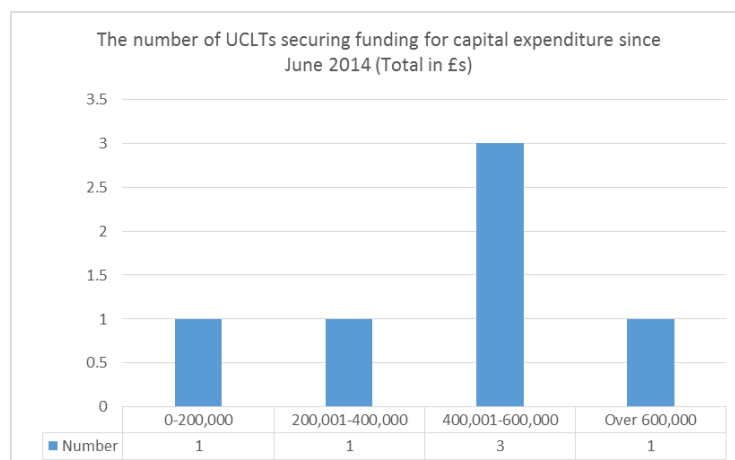
There was no funding reported from CLT umbrellas and none from housing associations.

The other reported sources included BLF Celebrate, 'CLT start up' (presumably a different source to UCLTP), a local community organisation and LUSH charity pot.

This experience supports parallel research for Power to Change that argues for the need to streamline the existing unsystematic and fragmented revenue funding support for CLTs and other community-led housing projects (Archer, Harrington and Kear 2017).

Capital Funding

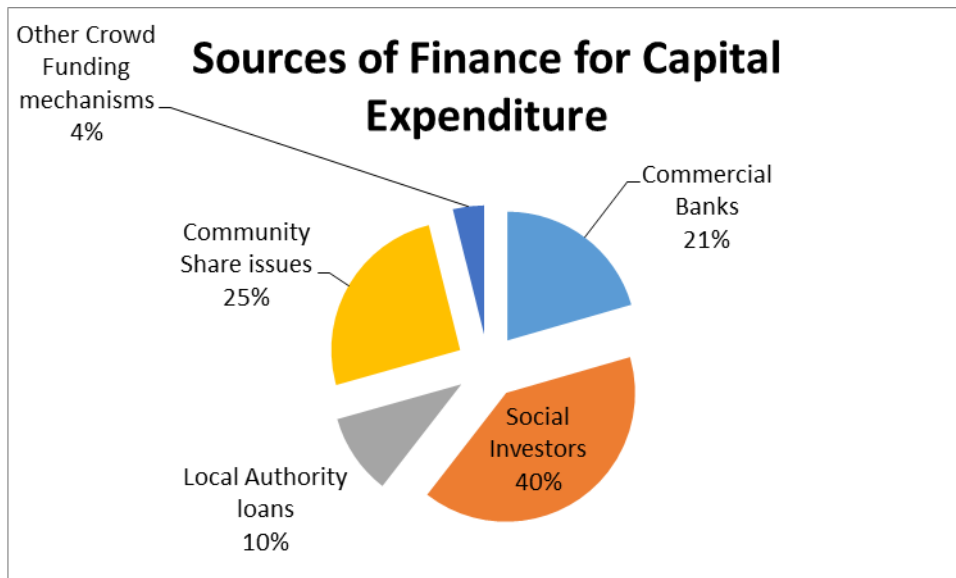
The survey questionnaire attempted to distinguish between the revenue grants discussed above and capital funding which was described as 'loan or borrowed (repayable) funding for capital expenditure'.



There were 11 respondents to this question, with only 6 reporting any capital expenditure to date. This may reflect the early stage of development of some of the UCLTs with no capital expenditure yet incurred, but the data almost certainly underrepresents capital funding secured to

date. A total of just over £2.4million was reported by the 6 projects, with four of them raising in excess of £400,000 and 2 smaller amounts.

There was a rather higher amount of capital finance (totalling to £3.7 million) revealed by the following questions which asked about each specific source of capital finance including, banks, building societies, social investors, local authorities, community share issues and other crowd funding.



Three were funded, at least in part, by **social investors, who accounted for 40% of all the funding** secured (unfortunately we did not ask respondents to identify which investors). Two had secured loans from commercial banks accounting for 21% of finance raised. Surprisingly there was no funding reported from building societies and only one from a local authority (the Greater London Authority).

Community share issues and other crowd funding proved to be important source of funding. The four community share issues had raised nearly £1million. The largest by London CLT accounted for nearly half of this total, while Leeds Community Homes had raised £362,000 and Somerset Cooperaive CLT £100,000. Heart of Hastings had used an 'investors collective' with local people investing between £5,000 and £50,000 each to achieve a total of £147,000.

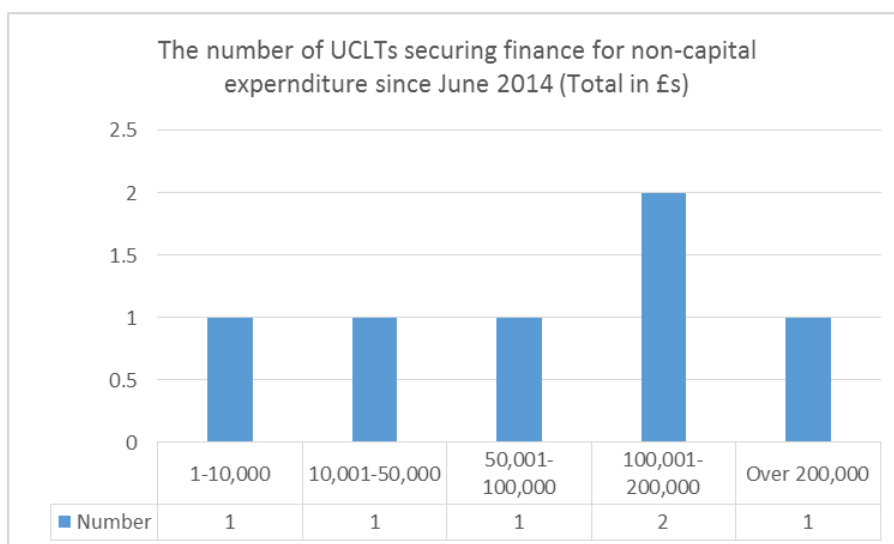
These findings show a much greater use of community finance and social investors than would be found in the mainstream housing sector. This reflects the capacity of community based projects with social goals to attract this type of funder. It may also reflect the difficulty in securing support from commercial lenders at pre/early development stages prior to the prospects of an income stream.

These forms of financing also had wider benefits for the aims and growth of UCLTs as the example of Leeds Community Homes community share issue illustrates:

Leeds Community Homes reported that their community share issue had been one of their most important impacts to date. *'The success of the community share offer offered a different vision of how we can create the homes we need in Leeds, through the creation of what we called People Powered Homes'*.

They stated that without the UCLT Programme *'It would have been difficult to prepare, launch and run a successful community share offer'*. They used their UCLT grant for *'contribution to costs during 2016 - in particular legal costs, costs of producing share offer document and business plan, launch, promotion and administration of community share offer'*. When asked about how their wider membership was recruited they stated that the *'vast majority are community share investors - who automatically become members'*.

There was a further question about **non-capital expenditure (e.g. pre-development work)** which was answered by 10 respondents, 6 of whom identified some expenditure totalling to £585,000. Reported expenditure by source was lower than this and mainly consisted of small grants from local government, umbrellas and foundations. Half of these had spent under £100,000 while the other three were all under £230,000. The main sources of funding were local authorities (£56,000), National CLT Network (£39,000), Power to Change (£39,000), Locality Community Right to Build (£30,000) and Homes and Communities Agency (£7,000). Other sources reported included 'some earned income of £3,416 from visits, speaker fees etc' (Hastings) and 'Venturesome loan - £21,800 Awards for All Grant - £10,000, Local private loans and donations - £31,500' (Oxfordshire CLT).



Asset transfers

Asset transfers are another way in which UCLTs can be enabled to develop. 5 of the 11 respondents to a question on asset transfers said that they had received asset transfers of land or buildings at zero or discounted value since June 2014.

Bristol CLT had received a site for 12 houses from Bristol City Council, Heart of Hastings CLT had a 5.5 acre site on license from Hastings Borough Council.

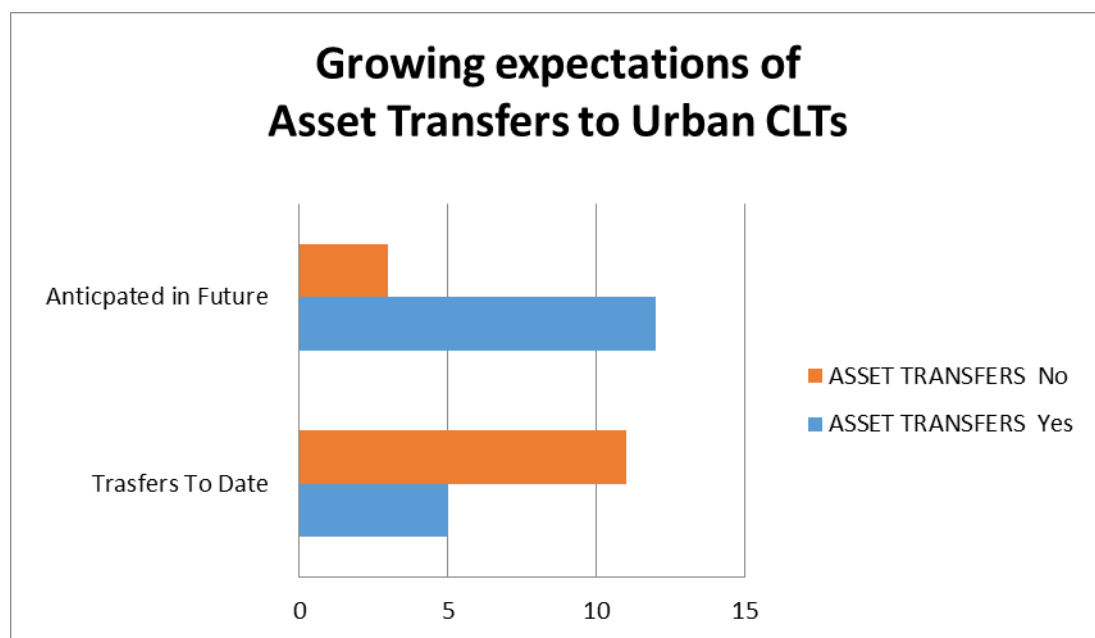
Liverpool City Council had developed an asset transfer policy identified as best practice in research by the authors on empty homes programmes <https://www.birmingham.ac.uk/Documents/college-social-sciences/social-policy/SPSW/Housing/2016/Liverpool-CC-asset-transfer-briefing.pdf>

The value of supportive local policies comes through in responses from the two Liverpool UCLTs in the survey. Homebaked reported that the City Council ‘will transfer the freehold of the bakery building for £1 after completion of the shared 4 unit flat above in 2018’. Granby 4 Streets reported that the Council had already ‘transferred 13 longterm empty homes to Granby 4 Streets for £1.00’.

While not responding to the survey it is known that Middlesbrough CLT also received asset transferred empty homes at £1 from Middlesbrough Council .

<https://www.birmingham.ac.uk/Documents/college-social-sciences/social-policy/SPSW/Housing/2016/P-Impact-Presentation-Asset-Based-Development-Middlesbrough-June-9th-2016-dm-june-5.pdf>

The growing potential for asset transfers is illustrated by the 80% of 15 survey respondents who answered these questions who were expecting asset transfers in the future compared to the 30% with transfers to date.



Anticipated future transfers include land transfers in Bristol, Enfield, Lewes, Oxfordshire and Soham. Property transfers anticipated include 9 terraced houses to Hombaked and commercial buildings to Granby 4 Streets in Liverpool, and the freehold of a power station site and a town centre building to Heart of Hasstings CLT.

Benefits of taking part in UCLT programme

The survey included a number of questions about the reasons UCLTs had taken part in the programme, the benefits they had derived from this, the types of support that have been most important and valuable from their perspective, and things that they would not have done without the programme.

We were interested in the distribution of responses and wanted to capture the benefits that respondents **most valued** and those that they **least valued** in a simple summary analysis.

The next paragraph refers to the **most valued benefits** –scoring combines those answering very important and important to give a combined importance ranking).

The £10,000 grant was generally seen as a very important reason for taking part. 13 saw it as very important and 3 as important (a combined importance rating of 100). Of the other reasons we enquired about the ones regarded as most important by respondents were (in ranked order of combined importance rating)

- **Peer Networking opportunities (88)**
- **Building Capacity and Confidence (81)**
- **Raising profile with other key players (e.g. local authorities) (81)**
- Technical support and advice (69)
- Help to lobby, influence and organise locally (56)
- Advice on other sources of finance (50)

Looked at the other way we used a ‘combined unimportance ranking ‘ to capture the **least valued benefits** by adding those answering very unimportant and quite unimportant). For example none of the respondents saw the £10,000 grant as unimportant giving a combined unimportance rating of 0. The ranked unimportance for other factors was:

- **Building Capacity and Confidence (0)**
- **Raising profile with other key players (e.g. local authorities) (6)**
- Technical support and advice (13)
- Peer Networking opportunities (13)
- Help to lobby, influence and organise locally (13)
- Advice on other sources of finance (19)

So somewhat surprisingly while the £10,000 grant was the most important reason for taking part in UCLTP, advice on accessing other sources of finance was the least important. Peer networking was a generally very important reason but a few respondents rated this as unimportant. Building confidence and raising profile came next on both the most important and least unimportant scales. Helping to lobby locally was only seen as moderately important and also attracted some higher unimportance rankings

Further questions sought to identify other forms of support valued by UCLTs.

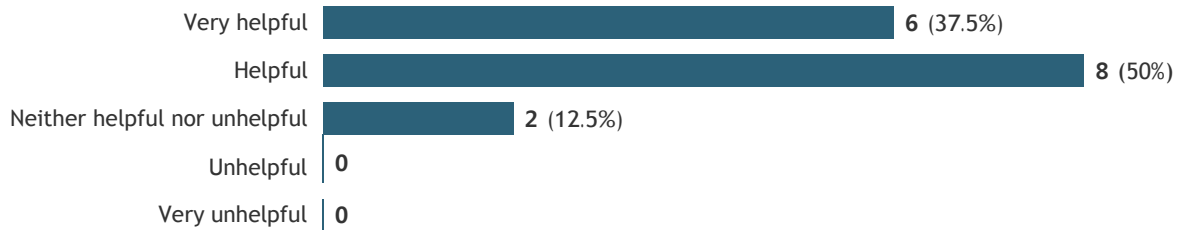
Using the same methodology as above we can identify in ranked order the support that was seen as the **most important (first score) and had fewest respondents thinking unimportant (second score) were:**

- **National lobbying and support (88-6)**
- **Peer-Peer learning (75-0)**
- Local Authorities (63-19)
- Local/Regional support (56-38)
- Housing Associations (31-23)

In general the greatest importance was placed in national lobbying and support and peer to peer learning. The position with local and regional support including from local authorities was seen as less important while support from housing associations was the weakest.

Support from National Community Land Trust Network (NCLTN)

We asked a general question about the helpfulness of support by the National Community Land Trust Network through UCLTP . Responses were extremely positive.

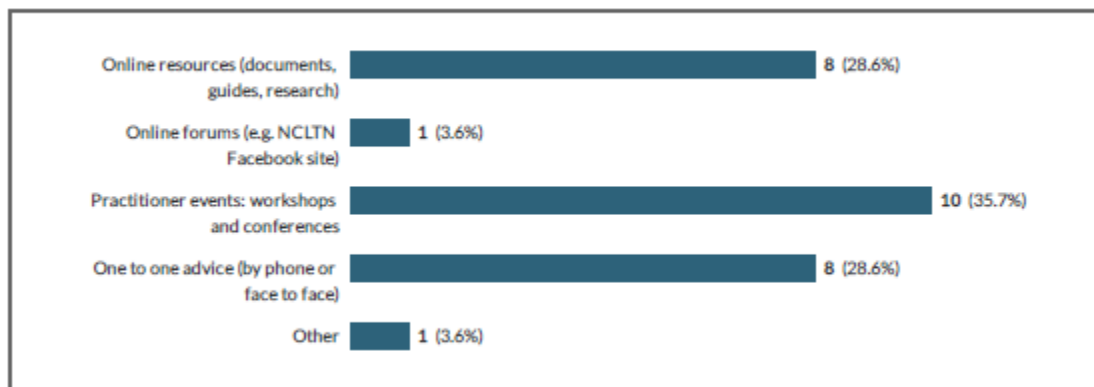


This was followed up by asking respondents to write in any aspects of NCLTN support that were unhelpful or could have been more helpful. There were four responses:

- *Offers very little support for CLTs in Wales*
- *The website is not easy to negotiate. It would be helpful if you could have a page which lists what documents etc. a CLT needs to have in place e.g. policies etc.*
- *We could have made more use of your expertise to make faster progress (our fault, not yours!)*
- *I don't think we have had a lot of support. That's not meant as a criticism, just a reflection of the fact that there hasn't been much capacity to offer support.*

We went on to ask about the value placed by respondents on specific types of support from NCLTN

What types of information or support have been most valuable?



The greatest value was placed on practitioner events. A high value was also placed on on-line resources and 1-2-1 support. Online forums and the FaceBook site were much less valued. One respondent had greatly valued the support provided in securing European funding. A write in question enabled UCLTs to identify the single most important organisational benefit from taking part

in the programme. These write in responses captured more vividly some of the key benefits and types of support that were most effective and what this enabled the UCLTs to achieve:

- *Without both the cash and the constructive advice from NCLTN consultants and staff, this CLT would have foundered. Instead it is now going from strength to strength and we hope it will be a pathfinder for other CLTs in the area. (Lewes CLT)*
- *Financial support in terms of the Urban CLT Grant has been very important. It enabled us to keep functioning, whilst we secured other additional funding support. The shared information and resources provided by the National CLT Network has also been very important, as has the opportunity to learn from other CLTs. (Homebaked CLT)*
- *It was a crucially important grant at the start of our journey. We knew what we wanted to do and needed someone to invest to get it started.(Heart of Hastings CLT)*
- *Being linked in to a wide network of organisations doing similar work and using them as well as online resources to navigate through the project (Ambition Lawrence Weston)*
- *Meeting and learning from other UCLTs (Truro CLT)*
- *Built sufficient capacity to secure the full DCLG Community Housing Fund allotment to our City and feel confident to implement it successfully. (Brighton and Hove CLT).*

Finally we asked respondents to consider the counterfactual – what would have been the adverse consequences of not receiving the £10,000 funding.

A variety of potentially adverse consequences were identified in relation to staffing, and foregone expenditure on professional services, legal advice, pre-development work, share issues etc . Inevitably this would have caused delays in progress and in some cases total abandonment of the CLT initiative.

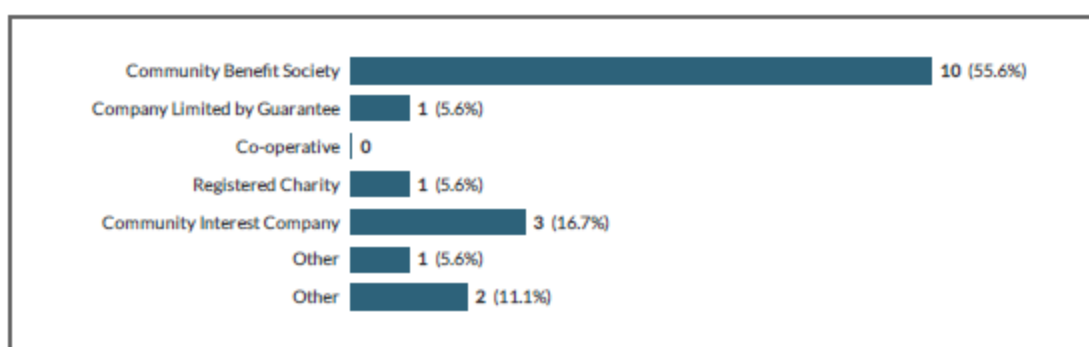
- *Would not have had a first employee and that person may not have stayed involved in the committed way which has led to new opportunities.(Oxfordshire CLT)*
- *It would have been very difficult to get the professional advice we needed (Thrift for Soham)*
- *We would have needed to secure funds for legal work which could have delayed the establishment of the CLT. (Granby 4 Streets)*
- *We would have had to have waited longer to start the pre-development work, damaging relationships with the local authority and frustrating our hardworking campaigners! (London CLT)*
- *It would have been difficult to prepare, launch and run a successful community share offer. (Leeds Community Homes)*
- *Would have taken more time to develop projects and delayed surveys etc (West Rhyl CLT)*
- *This was absolutely essential seed money. It has probably saved us 3 years.Lewes CLT)*
- *Initiative would have been abandoned (Brighton and Hove CLT)*

Governance

The survey provided an opportunity to collect new information on the governance, legal forms, partnerships, membership and recruitment practices of UCLTs.

Legal Form

Community Land Trusts are defined in the 2008 Housing and Regeneration Act (Clause 79) as ‘a corporate body’, ‘providing benefits to the local community’, and ‘controlled by a trust which people who live or work in a specified area have the opportunity to be members of’ and ‘ensuring that assets are not sold or developed except in a manner which the trust’s members think benefits the local community’. However, a CLT is not a legal model in itself and CLTs must choose between Community Benefit Society, Community Interest Company and Company Limited by Guarantee and registered charity options <http://www.communitylandtrusts.org.uk/filecache/3d8/4e6/196-introduction-to-legal-formats--for-website.pdf>



Survey results indicate that Community Benefit Society is easily the most popular legal form amongst the new generation of Urban CLTs, accounting for over half of all responses. 3 are Community Interest Companies (CICs) and there is just one Registered Charity and one Company Limited by Guarantee. Two of the three others clarified their current status. One is currently a CIC but considering registering as a Community Benefit Society, the other was registered as an Industrial and Provident Society in 2011.

Registration with Housing England (previously known as the Homes and Communities Agency, HCA) is important if organisations wish to access public grant funding for social and affordable housing. However, community-led housing organisations have experienced considerable difficulties in securing such registration and the regulatory expectations of the HCA have increasingly been orientated to large scale developers rather than community based organisations. Some traditional CLTs have managed this tension by forming partnerships with registered providers who have accessed public grants on behalf of CLTs and provided development agent services. We therefore included questions to establish whether the UCLTs are registered providers and if not whether they have partnerships with registered providers.

Only two survey respondents (London CLT and Bristol CLT) indicated that they were registered providers and only one currently had a formal partnership with a registered provider (Granby 4 Streets with Steve Biko HA), while two others had less formal partnerships with registered providers

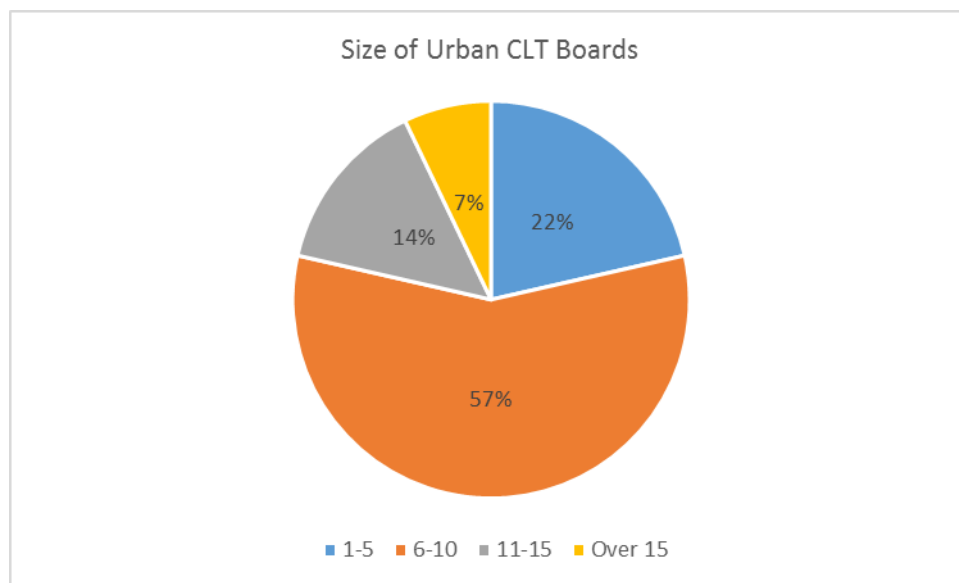
(for example providing advice and support and housing management services). Two more were considering such a partnership

- *'We are meeting the Council on Thursday to discuss this. We understand the necessity for this link' and 'this will be the intention once we have determined our governance model'.*

Since one of the main aims of most of the UCLTs is to develop or refurbish homes for low income households, and this would presumably benefit from public grant, it seems surprising that there was no specific reference to development partnerships with RPs in these responses.

Board Membership

We included a number of questions to establish the size and composition of UCLT boards.



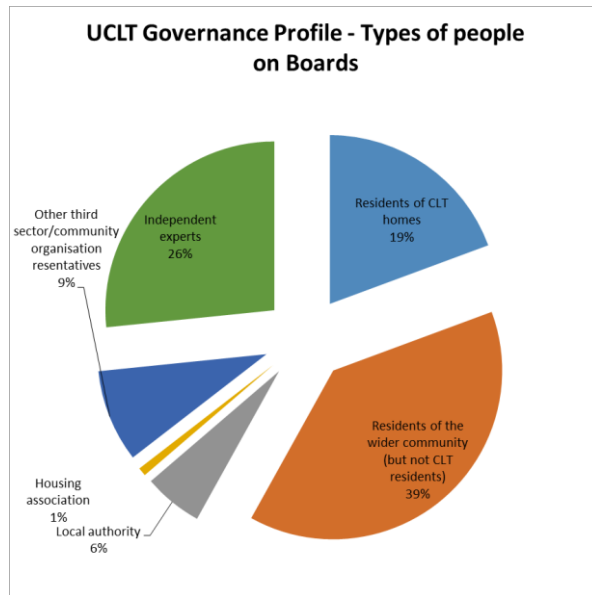
We can see from the figure that there is a predominance of relatively small boards among the UCLTs. The largest reported number of board members was 19 and the smallest 4. But well over half of the boards had between 6 and 10 members. This is in line with recent governance trends in the non-profit sector including housing where boards have tended to become smaller in recent years partly reflecting guidance on governance practice .

Survey responses identified a total of 118 board members across 14 responding organisations with constituted boards. One organisation responded that its board was 'in development' while another did not respond to this question.

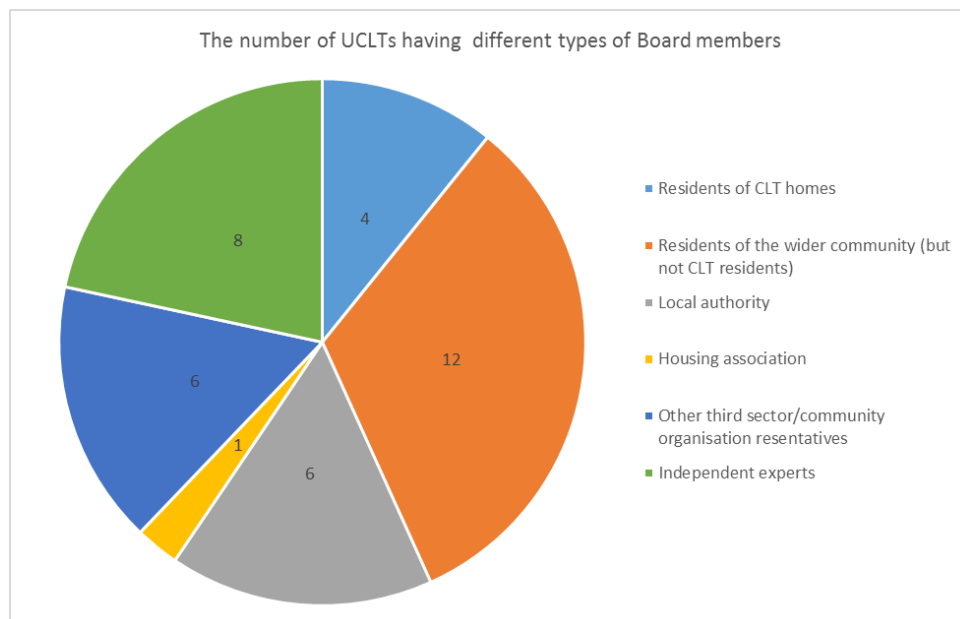
The next pie chart gives a picture of the backgrounds of people involved in board membership across all of the reporting UCLTs – effectively a profile of who is involved in the early governance of the sector. As expected there is a predominance of local community residents made up of two distinct groups (CLT residents 19% and local residents who are not housed by the CLT 39%). The next most numerous group on boards across the sector are independent experts – 26%). This category included 'stakeholders', university staff, an ethical property developer and a LEP employee.

Amongst the smaller groups of board members, third sector/community organisations outnumbered local authorities by two to one, but together they make up only 15% of all board members. The most

surprising finding is that just one housing association representative was identified across all the boards but it was noted in one other case that *'two of our board have held senior positions in HAs'*.



The overall profile figure gives a slightly misleading picture when it comes to the governance of individual UCLTs. The next pie chart therefore shows the number of boards on which different types of board member are present. We can see that CLT residents are present in only four cases. This partly represents the early stage of the programme with only 51 completed and occupied dwellings. The other reason for the discrepancy in the importance of CLT residents between the two figures is that in one case, 14 of the 19 board members are tenants of Hammersmith and Fulham Council which was planning to allow a developer to demolish their homes. The CLT that they are members of West Ken Gibbs Green Community Homes was formed as the result of opposition to that process. From this figure it is clearer that in most cases **the two predominant groups on UCLT boards are residents of the wider local community and independent experts with a smaller representation of third sector organisations and local authority representatives.**



The Chairs of the UCLTs are particularly likely to be local residents. This seems important for the local accountability and legitimacy of CLTs and sets them apart from most social and commercial housing providers. 6 are residents of the wider local community, 2 are CLT residents or prospective residents, 2 are independent experts , 2 are local authority persons and there are 2 (unnamed) others.

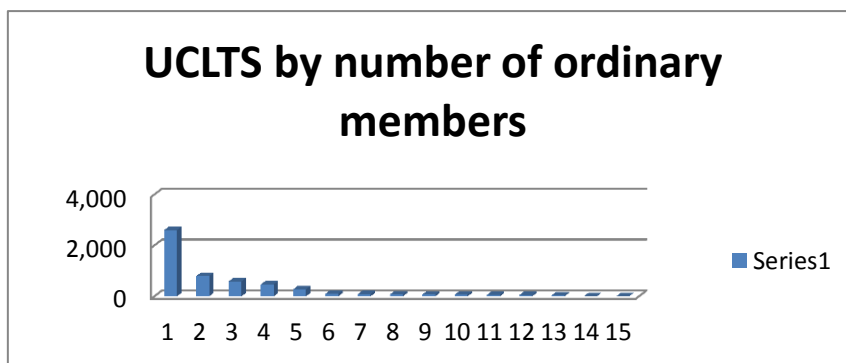
Wider Membership and Recruitment

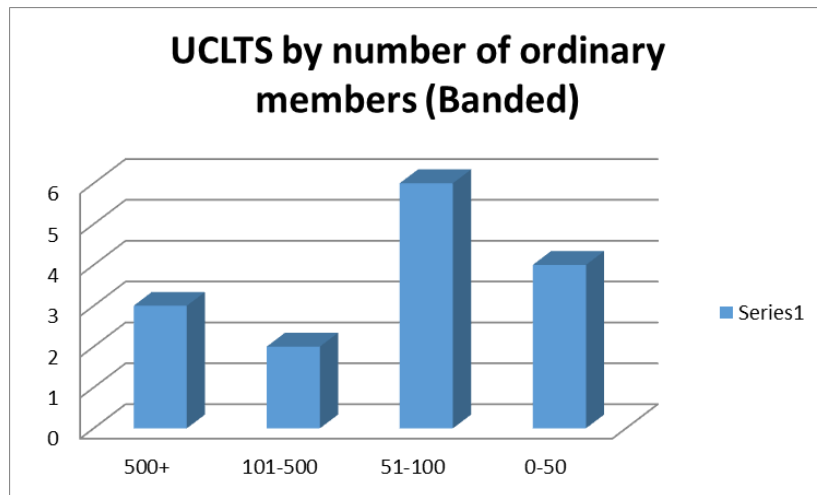
One of the key early achievements of the UCLTs has been to recruit significant local memberships. This is also very important for their legitimacy and sets them apart from housing associations as organisational forms.

The 15 responding UCLTs have between them recruited a remarkable total of 5295 ordinary members. London CLT with its connections to Citizens UK has managed to recruit 2600 ordinary members, Naked House has 800 members, West Ken Gibbs Green Community Homes has 587, Bristol CLT has 470 and Leeds Community Homes has approximately 275 (including community shareholders).

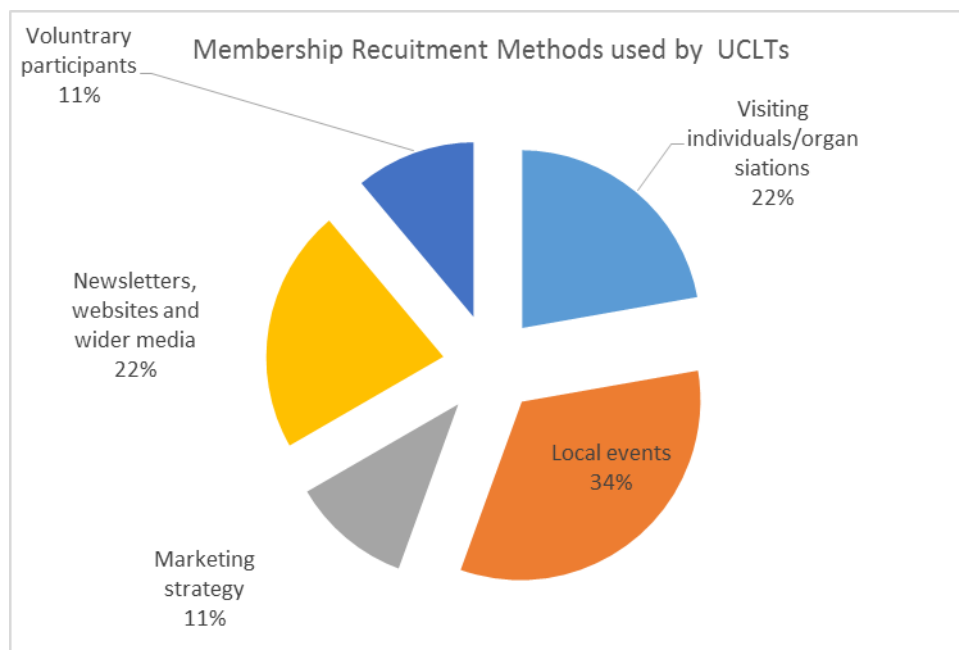
Of those responding only two had less than 10 ordinary members; in both of these cases there appeared to be a conterminous board membership and ordinary membership, a situation that is much more common in housing associations.

The dominance of the largest UCLTs in terms of membership size is highlighted by the first bar chart showing ranked absolute number of members per organisation. Meanwhile the second bar chart gives a clearer picture that the typical UCLT has between 51 and 100 members. Thus in relation to housing stock the UCLTs have a much larger membership base than typical housing associations.





We asked respondents how they had managed to achieve such success in membership recruitment. The pie chart below shows the main membership recruitment methods used across the sample. As locally based organisations we see a considerable emphasis on face to face methods such as holding local events and visiting individuals and encouraging voluntary participation (for example through community share subscriptions). These methods account for nearly two thirds of those reported by respondents in an open ended question. The remaining third comprise more formal marketing and communication strategies (such as newsletters, websites and media)



It is interesting to focus on the methods used by the UCLTs attracting the largest memberships.

The outstanding achievement of 2600 members by London CLT is accounted for by its systematic communication strategies: *‘Through membership drives held at local institutions by campaign groups throughout London, through broader media and publicity such as: being featured on "Find me a Home", news articles in the Guardian and BBC and via our allocations process.’* as well as its links with London Citizens. In contrast the next two largest memberships had been achieved through face to face methods. Naked House reported that it had attracted 800 members through *‘word of mouth’*

while West Ken Gibbs Green Community Homes had secured 587 resident supporters for its anti-demolition campaign by *'visiting every household'*.

Bristol CLT had achieved a membership of 470 for its city wide CLT by a mix of the two approaches: *'First 150 (were) recruited at launch event in 2011. Members numbers have been growing incrementally since, especially in response to publicity.'*

Membership Fees

There were variable practices in relation to membership fees with a £1 life membership fee (similar to the old style £1 I&P shares) being the most common approach adopted in at least eight cases. One UCLT had £5 annual fee and four currently had no membership fees.

Conclusions

This is the first survey of Urban CLTs in England and Wales. It provides a rich picture of a newly forming sector that provides a distinctive and innovative approach to tackling a range of urban housing issues. The survey has captured the earliest years and tracked the impact of a grant programme established by NCLT to extend the reach of CLTs into the urban centres.

It provides some estimates of the immediate housing impacts at the early stages of a development pipeline and happily notes that the first 51 residents are now in occupancy in Bristol, London, Liverpool and North Wales. One clear finding is that UCLTs may make a disproportionate contribution to total CLT units nationally, in part due to their work on large schemes. Supporting UCLTs with this grant can therefore be seen as a prudent decision, if the objective was to expand the CLT movement and to create a broader set of beneficiaries.

The survey also explores the immediate wider community and employment impacts and highlights the important opportunities that UCLTs have provided for volunteering. It indicates an employment impact of at least 54 posts and a volunteering impact of a minimum of 307 volunteers at the heart of the urban CLTs – a very significant human impact!

It provides a vision of the longer term impacts the programme could achieve by 2024 and what this could mean for places, communities, housing needs and the spread of community-led housing ideas. This could involve completion of three times the number of homes currently expected to be completed in the next few years; especially if the landmark 'right to transfer' application by West Ken Gibbs Green Community Homes is successful.

The longer term community impact of UCLTs is expected to include meeting local housing need, enacting wider visions of local community impacts and ambitions for organisational and sector development to sustain community-led housing models into the future. This will entail changes to the institutional landscape to widen housing choices by for example *'To have spread CLTs to at least 6 boroughs in London, putting CLTs on the affordable housing agenda in multiple councils, thus giving more people the chance of homes they can afford.'*

The survey has provided a rich picture of the finances of UCLTs. It indicates the amount of revenue and capital funding that has been attracted into the sector. A leverage of 17:1 on revenue income has been achieved by pump priming grants of £10,000. Further revenue grants have come

predominantly from Charitable Foundations and from Central Government, including via local authorities through the recent Community Housing Fund.. It is clear that the UCLTP grant provided CLTs with the capacity to pursue other funding opportunities.

A distinctive profile of capital investment has been achieved in securing £4 million predominantly from social investors and community share issues and crowdfunding. On the one hand this indicates the unique potential of a community based and social purpose sector to access funding that would not be available to public or private bodies. On the other it may indicate the early stage of the development process captured here with schemes not yet well positioned to take on long term commercial loans. One point of concern about capital funding is that the UCLTs appear to be weakly connected to the main source of Government grant funding for housing, the Homes and Communities Agency (now Housing England). Only two UCLTs reported that they had registered provider (RP) status and only one other said that they had a formal development agreement with an RP.

Asset transfers involving free or discounted land and buildings have already begun to play a part in the development options for the sector thanks to enlightened policies such as those developed by Liverpool City Council. Projects anticipate an increase in asset transfers in the future despite conflicting pressures on public asset holders.

UCLTP Participants have benefitted from the UCLTP grant to employ staff and secure professional advice at an early stage and to maintain momentum. They have also valued opportunities for peer to peer learning and raising their profile with stakeholders such as local authorities. They have placed less value on the opportunities from UCLTP participation to learn about wider funding and local organising, presumably because this type of support has been secured in other ways.

UCLTs have a distinctive membership and governance structure which sets them apart from social, and commercial housing providers. Boards comprise mainly local residents and independent experts; with chairs particularly likely to live locally. Most UCLTs have been highly successful in recruiting ordinary members, some of them spectacularly so. This has involved a mix of face to face methods and in some cases communication and marketing strategies. This wider membership base will be very important in building the legitimacy and visibility of CLTs.

Overall this report indicates that the UCLT programme has largely met the objectives set by NCLTN. Evidence is provided of the impact of 16 of the demonstration CLTs in a range of urban contexts and the value of the support provided by UCLTP in their successful delivery of affordable housing schemes. There is a pipeline of new affordable homes in place which is significant in scale in relation to the largely rural CLT activity to date.

The survey itself has not provided direct evidence of the increased awareness of the role that CLTs can play in meeting the need for affordable housing among city leaders and policymakers. However there are a number of indirect indicators of this including local authority funding, particularly through the Community Housing Fund, the growth in asset transfers and the value of explicit local authority policies on this as in Liverpool. The apparent ability of urban CLTs to secure land for new build schemes in urban areas is another indicator of successful engagement with local authority planners, since new build schemes account for the vast majority of the programme.

There is clear evidence of an increased community capacity among urban CLTs, including their campaigning capabilities and impact. The level of civil society participation in their membership and governance sets most UCLTs apart from other types of housing body. UCLTs are frequently described as building community understanding of housing issues and giving a sense of hope. Campaigning capabilities are apparent across the case studies but no more so than at West Ken Gibbs Green Community Homes which has seen remarkable success to date in resisting proposed demolitions of social housing.

While again this survey is not a primary evidence source on public profile of UCLTs, there can be little doubt that slowly and surely the emergence of the UCLTs is increasing the public profile of the sector. CLTs are no longer likely to be seen as a small scale rural phenomenon but as part of a core civil society response to the dysfunctions of the housing system, successfully challenging destructive practices and actively modelling alternatives that meet community needs by drawing the boundaries well beyond housing production to include community assets and organisation.