

OWNERSHIP OPTIONS FUTURE FORM AND FUNCTION

1. ABOUT OWNERSHIP OPTIONS

- 1.1. Ownership Options is Scotland's specialist on the homeownership issues affecting disabled people. Its aim is to create equal access for all disabled people to mainstream home ownership. In order to do this it pioneers approaches that enable disabled people to achieve equal levels of inclusion, choice and control with non-disabled people in the housing market.
- 1.2. The organisation has three approaches:
 - it directly assists disabled people by advising on the financial, legal and design issues involved in buying property, as well as on their rights in relation to adapting their homes
 - it provides training and consultancy services to organisations in the private, public and voluntary sectors to improve their ability to assist disabled homebuyers
 - it raises the awareness of the rights and opportunities relating to disabled people and home ownership, providing information and lobbying to address the barriers that exist
- 1.3. A board of volunteer directors oversees the organisation's work. The majority of these are disabled or representatives of organisations of disabled people.
- 1.4. The organisation was formed in 1997 and is a Scottish charity and company limited by guarantee.

2. CONTEXT

- 2.1. Ownership Options was legally registered in 1997 and began work in 1998. It developed specifically to establish the feasibility of facilitating homeownership for disabled people previously deprived of this opportunity. The then dominant policy was care in the community, with the closure of long-term residential care establishments creating strong demand for housing by disabled people.
- 2.2. Over the last ten years, the policy agenda has moved on. A series of housing acts has made good quality and affordable housing a stronger theme in Scotland than community care. The work of the organisation has reflected this, with a decreased focus on independent living and an increased focus on those disabled people living in the most serious housing need.
- 2.3. At the same time it has become clear that whilst homeownership can provide a valuable additional housing option for disabled people, it is not widely supported by public and private organisations. Few local authorities routinely establish the homebuying options of disabled people who they are obliged to assist and mortgage lenders are still reluctant to lend on secure welfare benefits.
- 2.4. Increasingly, policy areas related to home ownership, such as disabled adaptation grants, have become a part of the organisation's work. Its unique knowledge of the legal and financial issues facing disabled people living in private sector housing is now considerably wider than just homebuying.

- 2.5. Whilst this work has been underway, the wider context of housing and disabled people in all tenures has not moved forward in Scotland. Whilst there is a fledgling network of housing and disability organisations, Ownership Options remains the nearest thing to a national voice on housing and disability issues. Many of the areas the organisation is involved in from a private sector position, such as house design or local authority housing strategies, are also valid across all tenures.
- 2.6. Having been in existence for ten years, and having achieved many of its initial goals, the organisation's Board is now looking to consider what future directions are open to it. To this end, it has agreed to retain a consultant to review the current position of the organisation and identify future options for it.

3. UNDERLYING THEMES AND CONTRACTOR'S SKILLS

- 3.1. The Board is open to considering all possible options for its future strategic direction. However, the contractor must take into account the organisation's commitment to:
- involving disabled people on its Board and in formulating its future direction
 - involving the staff of Ownership Options in formulating and supporting the future strategic direction
- 3.2. Those tendering for the work must be able to demonstrate that they meet the following specification:

Essential

Knowledge and experience of:

- membership models for voluntary sector organisation
- strategic business planning, capacity building – producing reviews and proposing strategic options for voluntary sector organisation
- housing and accommodation in Scotland including the private and rental sectors
- issues affecting disabled people

4. OBJECTIVES

- 4.1. Whilst the Board is open to consultants suggesting additional options for taking this work forward, the following areas should form a part of the proposal.

Consideration of the organisation's new aim

- 4.2. The Board has discussed previously the broad future aim for the organisation. It concluded that this should be:
- 4.3. *"Equality of housing in all tenures for disabled people - disabled people have access to suitable housing in the tenure of their choice"*

4.4. Whilst this has been agreed as the new aim for the organisation, there is considerable scope for alternative approaches to be taken to meet this aim. The proposal should reflect this variety.

The sector

4.5. Background information on the sectors that would impact on this new aim would straddle housing and disability. A diagrammatic presentation of the following should be provided:

- Who operates in the housing sector?
- Who operates in the housing sector and has a stake in disability issues?
- Who operates in the disability sector?
- Who operates in the disability sector and has a stake in housing issues?
- Where do they overlap?

The service users

- 4.6. The Board would want to gain a picture of the current housing situation generally, and specifically in relation to disabled people.
- 4.7. In particular, it wants to understand better the stakeholders it serves. As a result, the proposal should identify, research and summarise the information that currently exists relating to disabled people's thoughts on, and attitudes relating to, housing.
- 4.8. The Board is also interested in how the organisation could add to and develop information in this area. Where gaps are identified through the research above, the contractor should include proposals for developing new information, indicating which would be of most benefit to Ownership Options.

The organisation

- 4.9. If it is to achieve its new aim (identified in 4.3) the organisation will almost certainly have to go through significant change in terms of structure, staffing and funding. To facilitate this, the Board want to know more about how other organisations operate, what business models exist and how others generate or attract funding? The proposal should therefore identify:
- What organisations are comparable to Ownership Options in size, function and funding?
 - How national campaigning organisations are structured and funded?
 - What funding streams are there available to the revised organisation? E.g. lottery etc
 - Is there an organisation that Ownership Options would 'aspire' to be like?
- 4.10. The proposal should offer alternative structural and funding models that could best support the organisation in achieving its aim.

The external environment

4.11. The proposal should consider factors that could or will impact on it's ability to deliver it's aim including:

- *Political* - How does the current political situation affect Ownership Options? Will there be a different approach to funding? Will there be a different emphasis on housing, disability, general equality etc?
- *Economic* - How is the third sector financial environment shaping up? Is it more or less difficult to fundraise or secure funds just now than in the past? What are predictions for the future?
 - *Welfare benefits policy* – are they likely to change – go up/down? What impact will this have on disabled people's economic clout?
 - *Economic and social impact* – What are the economic impacts of disabled people not having access to suitable/accessible housing? Does it mean less likely to gain employment, to gain educational qualifications, to be healthy?
- *Social* - Attitudes to housing generally: is it all about buying/mortgages? What about eco-housing? What are the overall housing trends and how do these affect our 'niche' market?
- *Technological* – is the situation regarding adaptations to properties getting easier or more difficult? Are there new ways to create accessible housing?
- *Communication* - will the web, social networks etc help or hinder the organisation? Is there a way Ownership Options can harness new technologies to help it achieve its aim?

The internal environment

4.12. How well will the staff cope with change? How can the Board ensure smooth change management? What does the staff team bring to the table on this? How well is the Board operating?

Further issues for exploration

4.13. The Board would also like the following issues to be considered:

- *Membership organisations* – The research should look at a selection of organisations who do and do not have memberships to consider whether this is a viable option for Ownership Options.
- *Quality assurance* – The adoption of quality assurance type schemes e.g. Diversity Champions in the third sector should be assessed, along with their pros and cons?
- *A Charter*. The role and form of a housing charter, or manifesto, for disabled people should be reviewed. Are there examples of other types of charters that the Board could look at?
- *Volunteers*: The potential for involving volunteers should be assessed. What could they perform and how would they be managed?

5. OUTPUTS AND TIMETABLE

- 5.1. The proposal should develop a series of options for the Board to consider. The contractor should offer a method for enabling an action plan to be drawn up to achieve the preferred option. This will also require the merging of the existing plan with the new one.
- 5.2. The Board is open to proposals involving changes to, for example, staffing structure, funding structure, governance arrangements, name or logo. The priority from the Board's point of view is to ensure a sustainable organisation that delivers on its aim and for its stakeholders.
- 5.3. The research will form part of process of devising and launching the organisation's future direction as part of its ten year celebrations. It must therefore culminate in a timely report to Ownership Options' Board.
- 5.4. Following completion of the research, the Researchers will be asked to present the findings at a meeting of the Board and staff of Ownership Options.

6. COSTING

- 6.1. Researchers are invited to submit costed proposals. As a general guide, the Board has budgeted for approximately 20 days.
- 6.2. Once the brief is finalised with the successful consultant a fixed price will be agreed for the work.

7. METHODOLOGY

- 7.1. Contractors should explain the methodology they intend to employ, with costings of any alternative methods. It is envisaged that this would include meetings with Ownership Options' Board and staff team, as well as related organisations and stakeholders.

8. PROFESSIONAL CONDUCT AND EQUAL OPPORTUNITIES

- 8.1. The research proposal is required to state the researcher's code of Professional Conduct and approach to Equal Opportunities

9. PROJECT MANAGEMENT ARRANGEMENTS

- 9.1. Day to day management of the contract rests with the Director of Ownership Options. A monthly progress report will be supplied by e-mail whilst the research progresses.
- 9.2. The project's progress will be overseen by the Board of Ownership Options. They will evaluate the research proposals and select the research team, receive and discuss the interim report as described above.

10. TENDER/PROPOSAL DOCUMENT

- 10.1. Contractors are invited to submit detailed costed proposals for the project. Joint proposals by more than one consultant are acceptable. Proposal documents should contain and will be evaluated on the following information:-
 - details of the proposed method

- critical workplan detailing phasing of programme and key milestones
- the names and curriculum vitae of the key personnel who would comprise the study team along with details of any previous work undertaken by the study team which is pertinent to this project
- a clear specification of the individual responsibilities of each member of the study team as well as the time input of each member and the day rate charged for each individual
- a clear specification of the data required to undertake this study and where this will be sourced. If this data required is expected to be supplied by Ownership Options this should be clearly stated by the Contractor in the proposal.
- a clear specification of any input the contractor expects from Ownership Options staff and Board
- detailed fee costings, which should include and identify separately individual staff costs, fieldwork costs (where appropriate), equipment and materials, administrative expenses, estimated travelling and subsistence expenses, any other costs or overheads and VAT.

10.2. Travel and subsistence expenses should be reimbursed at cost rather than a percentage basis. VAT is not chargeable on travel and subsistence expenses.

11. CLOSING DATE FOR TENDERS

- 11.1. One electronic copy and two bound copies of the tender proposal must be submitted to Ownership Options by 2pm on Friday 14th December 2007.
- 11.2. Emails should be sent to richard@oois.org.uk.
- 11.3. Mail should be posted to Ownership Options, John Cotton Centre, 10 Sunnyside, Edinburgh EH7 5RA.