

# Caerphilly Homes

## Compliance Policy WHQS23

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## Introduction

Caerphilly Homes is committed to providing a high standard of accommodation and achieving and maintaining the Welsh Housing Quality Standard (WHQS) across our housing stock.

Using a range of approaches to ensure up to date information on all properties, this will be used to establish compliance with WHQS and the resources required to maintain this standard.

Where properties cannot be brought up to WHQS for reasons such as, residents' choice or physical constraints, we will review the position and ensure we communicate with tenants.

On occasions where properties fail to meet WHQS and we are unable to complete significant remodelling or structural alterations, an option appraisal will be undertaken to consider the most appropriate next steps.

Caerphilly Homes will ensure a clear focus on value for money in the way we deliver and procure work to improve our homes.

The journey to decarbonising the housing stock has started with the Optimised Retrofit Programme and over time these measures will be adopted across the majority of properties, seeing more homes become cheaper to keep warm addressing the increasing issue of fuel poverty.

## 1 Approach to WHQS23, reflecting local resources and circumstances

Caerphilly Homes is committed to achieving full compliance with the Welsh Housing Quality Standards (WHQS23) by conducting a comprehensive stock assessment and Housing Health and Safety Rating System (HHSRS) survey. This extensive assessment process involves evaluating each property's structural integrity, energy efficiency, safety features and an assessment of each component to establish a clear baseline for WHQS compliance. By using the HHSRS, Caerphilly Homes can systematically identify and categorise potential health and safety hazards within our housing portfolio, such as damp and mould, electrical issues, and structural concerns.

The HHSRS survey ensures any Category 1 Hazards, which pose immediate risks to tenant health and safety, are prioritised for rapid remediation. Simultaneously, the full stock assessment evaluates each property against all WHQS elements, including modernity of amenities, environmental impact, and tenant comfort. Data collected from these surveys is meticulously recorded and managed using asset management software, allowing Caerphilly Homes to create a detailed compliance roadmap.

This system not only supports efficient tracking and prioritisation of properties requiring urgent upgrades but also provides real-time insights to guide budgeting, tenant engagement, and scheduling. By aligning each improvement with the WHQS elements, Caerphilly Homes is ensuring their entire housing portfolio will be safe, energy efficient, and comfortable, ultimately supporting the community's well-being and contributing to Wales's sustainability goals. The outcome of these assessments will inform tailored Target Energy Pathways for each property, driving phased energy efficiency improvements and low-carbon heating solutions to meet WHQS environmental standards. This approach guarantees that Caerphilly Homes not only meets regulatory requirements but also fosters safe, sustainable, and high-quality living conditions for all tenants.

Caerphilly Homes has established a dedicated WHQS Project Board to oversee and drive compliance with the Welsh Housing Quality Standards across its entire housing portfolio. This strategic board, comprising of senior management, officers, and key stakeholders, functions as a central hub for decision making, planning, and resource allocation to meet WHQS targets and deadlines.

The WHQS Project Board's mission is to ensure every aspect of compliance is rigorously managed, from structural safety and tenant wellbeing to energy efficiency and environmental impact. By bringing together a diverse range of expertise, the board is well positioned to identify and address challenges proactively, ensuring that all properties meet or exceed the WHQS elements, such as safety, accessibility, and modern facilities. Regular board meetings will be held to review progress, evaluate the outcome of stock assessments, and monitor budget allocation to ensure high priority upgrades, like structural repairs or energy improvements, are promptly addressed. In addition, the WHQS Project Board actively collaborates with the tenant engagement team to incorporate tenant feedback and preferences into the upgrade schedule, aligning project milestones with tenant needs and fostering transparency throughout the compliance journey.

The Board also establishes clear reporting protocols to provide stakeholders, including the Welsh Government, with regular updates on compliance progress and any significant challenges. This coordinated approach enables Caerphilly Homes to prioritise health, safety and sustainability in its properties, while adapting the compliance strategy to meet local resource constraints and community needs. By managing each project phase with meticulous oversight, the WHQS Project Board ensures Caerphilly Homes not only achieves compliance but also enhances the overall quality and satisfaction of the housing provided.

Caerphilly Homes approaches decision-making for WHQS compliance through a structured, data-driven process that prioritises tenant safety, resource efficiency, and long-term sustainability. To guide these decisions, Caerphilly Homes utilises a comprehensive Whole Stock Assessment and data from the Housing Health and Safety Rating System (HHSRS), allowing us to identify the most critical upgrades across the housing stock. Decisions are informed by input from the WHQS Project



Board, ensuring that each decision reflects both regulatory requirements and tenant needs. Properties are prioritised based on health and safety risks, energy efficiency

gaps, and tenant comfort, with urgent health-related improvements taking precedence.

Caerphilly Homes also engages tenants directly to incorporate their feedback, aligning decision-making with tenant preferences and lived experiences to enhance satisfaction and community support. The use of asset management software enables real-time tracking of property conditions and upgrade progress, supporting effective budget allocation and scheduling for compliance efforts. By combining robust data analysis, tenant input, and strategic resource planning, Caerphilly Homes makes well-informed, impactful decisions to ensure timely WHQS compliance while optimising the use of local resources.

Caerphilly Homes meets the WHQS standard by addressing each element of the standard on a detailed, element-by-element basis to ensure that all properties provide safe, comfortable, and modern living environments. For structural integrity and safety, Caerphilly Homes prioritises regular inspections and immediate remediation of hazards like damp, structural deterioration, and other safety risks identified through the Housing Health and Safety Rating System (HHSRS). For energy efficiency, properties are systematically upgraded with insulation, energy-efficient heating systems, and, where possible, low-carbon technologies to meet the WHQS SAP 92 target, ensuring affordability and minimal environmental impact.

In kitchens and bathrooms, Caerphilly Homes schedules updates for these essential amenities based on age and condition, ensuring that all units have modern, functional, and well-equipped spaces that meet hygiene and usability standards. For tenant well-being, elements such as sound insulation, suitable flooring, and accessible spaces are implemented to promote comfort and meet tenants' unique needs, especially for older adults or individuals with disabilities. External spaces, including gardens and communal areas, are maintained to provide secure, well-defined, and aesthetically pleasing environments.

Caerphilly Homes will prioritise tenant engagement where appropriate to incorporate feedback on improvements, ensuring that compliance efforts resonate with tenants' preferences and contribute positively to their living experience, recognising there will be certain elements where tenants may have less influence. This methodical, approach guarantees that Caerphilly Homes systematically meets the WHQS requirements across its housing stock, supporting the overall goal of providing high-quality, sustainable, and secure housing.

## **2 Database/Asset Management Software**

To support compliance with the Welsh Housing Quality Standards, (WHQS 2023), we utilise the CIVICA CX Asset Management System as our primary database and asset management software. CIVICA CX is a robust and comprehensive platform that enables the effective management of property-related data, including detailed building specifications, maintenance history, inspection records, and energy performance information.

The system will be fully integrated with key tools, such as the SAVA Intelligent Energy Pathways (TEPs), managing Energy Performance Certificates (EPC), and meeting WHQS reporting requirements. This integration ensures that property data is accurate, up to date, and easily accessible, enabling evidence-based decision making and compliance with regulatory standards.

CIVICA CX also supports automated workflows, reducing manual entry and minimising the risk of errors, while providing detailed reporting capabilities that enhance transparency and accountability. Regular data audits, housekeeping, and enrichment activities are conducted within the system to maintain data quality and address any gaps or inaccuracies.

The system's user-friendly interface and customisation options allow it to adapt to the specific needs of the organisation, ensuring it remains a central tool for effective asset management and compliance. Through CIVICA CX, we are able to uphold the principles of WHQS, deliver energy-efficient improvements, and support sustainable housing initiatives for our tenants.

## **3 Tenant Engagement**

Caerphilly Homes tenants were engaged in various ways to help achieve the initial WHQS standard and it is anticipated that this engagement will continue with the updated standard. Lessons learned will help to inform the framework for engagement moving forward. Caerphilly Homes has a dedicated tenant participation budget and dedicated participation officers who can support an engagement framework for WHQS. This framework will look to engage tenants in different ways and at different levels.

The engagement with Caerphilly tenants following the renewed standard release have included the following. A WHQS introduction session for involved tenants with presentations from the Head of Housing and Head of Assets, Maintenance and Repairs. A small tenant group visit to view new technology and kitchen ranges at our supply partner. A newsletter to all tenants, inclusion of warmth and affordability questions in our annual rent survey, an update of our working standards after review with tenants and a series of tenant sessions facilitated by David Wilton, Director of TPAS Cymru.

The TPAS Cymru sessions were held in November and December 2024 and included a background to WHQS23, 2 sessions looking at identifying areas for meaningful tenant engagement in WHQS23 and a communications workshop covering the type of information that tenants want and their preferred methods for delivering that information. Some sessions also included Caerphilly Homes staff. The sessions also demonstrated that tenants have a real interest in knowing more about the new technology that is likely to be used in their homes in future.

Three staff sessions to give a general overview of WHQS and the importance of tenant engagement are planned for early 2025. These sessions will be delivered by TPAS and are aimed at staff who might not be involved in WHQS on a day-to-day basis but need a general awareness of WHQS and an appreciation of the requirements for tenant engagement.

There is also an option for TPAS to deliver a briefing to elected members at an appropriate time and consideration is being given as to whether TPAS can support Caerphilly Homes to identify and deliver any training requirements for tenants that might want to be involved in future, especially in any monitoring arrangements.

Going forward there will need to be future discussion and decisions on how tenant views can feed into the Caerphilly Homes WHQS governance structure and how information on decisions can be communicated back to both involved tenants and the wider body.

Communications is a key area and there are opportunities for tenants to be involved in suggesting/reviewing content and on decisions around how information is delivered.

As well as developing an engagement framework based on sessions with tenants, there are also existing sources of information that come from tenants that can help to inform and shape the future programme. This includes tenant satisfaction information, complaints data and feedback from tenants who have already had works completed.

There will be an opportunity in autumn 2025 to include questions around WHQS priorities in the next tenant satisfaction survey.

## 4 Independent Verification

To effectively manage the independent verification of compliance with the Welsh Housing Quality Standards (WHQS), a clear and structured approach will be adopted, ensuring the integrity, accuracy, and independence of the process. Recommendations will be incorporated from the Audit Wales review of WHQS in 2012, mandating independent verification every two years following the initial review, which will occur after the standard comes into effect.

The verification process will be conducted by parties not directly involved in the delivery of the WHQS programme. This could include the Council's audit team, external consultants, or independent audit firms. A clear policy will be established to avoid any conflicts of interest, ensuring that the verifiers have no stake in the outcomes of the WHQS implementation.

**Timing** - The first independent verification will take place in April 2026, which will be two years after the WHQS Standard was implemented.

**Scope** - The initial review will focus on evaluating the effectiveness of the systems and processes established to ensure compliance with WHQS.

**Methodology** - The initial review will focus on evaluating the effectiveness of the systems and processes established to ensure compliance with the WHQS. The verification will involve reviewing data collection, management practices, compliance reports, any tenants feedback or complaints and overall progress in implementing the WHQS. This may include site visits, interviews, and system audits.

**Reviews** – subsequent independent verifications will be conducted every two years. Each review will build on previous findings, focusing on areas that require improvement and ensuring that corrective actions from previous audits have been effectively implemented.

**Documentation and reporting** – after each review, the independent party will provide a detailed report outlining their findings, conclusions, and any recommendations for improvement. Based on the verification report, an action plan will be developed by the Assets Team to address any identified issues or areas for improvement.

Ensuring Accountability and Transparency, the findings from the independent verification will be cross-referenced with the on-going internal Audit Service reviews to ensure consistency and comprehensive oversight. Regular updates on the independent verification process and outcomes will be provided to the WHQS Project Board and relevant stakeholders, ensuring transparency and accountability.

This could be communicated back to tenants on two levels. Firstly, in more detail to any tenant monitoring group that may be set up. Secondly, to all tenants as part of a wider update in newsletters for example.



The Compliance Policy will include budget provision for independent verification, ensuring that the process is adequately funded whilst avoiding unnecessary expenditure.

It is envisaged that a regular Welsh Housing Quality Standard internal audit review will also be undertaken on a 10% basis; this will involve creation of a structured and repeatable process that ensures ongoing compliance and identifies any issues early, enabling timely corrective actions and continuous improvement in WHQS compliance.

After completing each audit, the findings will be documented in a detailed report. This report will highlight areas of compliance, areas of concern, and recommendations for improvement, including a section that outlines specific actions needed to address any issues identified during the audit. The audit will be shared with the WHQS Project Board and Asset Maintenance and Repairs Management team and the wider Housing Management Team of Caerphilly Homes.

The action plans will be monitored ensuring any corrective actions are implemented and followed up in subsequent audits. Periodically the audit process will be reviewed to ensure it remains effective adjusting the sampling method or audit focus as needed based on findings or changes in WHQS requirements.

## **5 Compliance Statements for New Tenants**

All vacant properties have a WHQS survey undertaken before the property is re-let, and new contract holders will receive a WHQS compliance certificate as part of the sign-up information pack provided to them.

Compliance Certificate – Appendix A



## 6 Elements Not Measured

### 3d Landlords must carry out a Whole Stock Assessment and produce Target Energy Pathways for their homes.

To comply with the Welsh Housing Quality Standards (WHQS23) requirements, Caerphilly Homes has committed to conducting a comprehensive Whole Stock Assessment and developing Target Energy Pathways for all properties in our portfolio. This ensures that every home aligns with energy efficiency and decarbonisation goals, contributing to tenant well-being and environmental sustainability.

The whole stock assessment evaluates the current energy performance, condition, and compliance status for all properties using CIVICA CX for data integration and SAVA Intelligent Energy System for advanced energy analysis. This provides a baseline understanding of our housing stock and identifies properties requiring priority interventions.

CIVICA CX serves as the platform for asset and compliance management. It integrates tenant information, maintenance records, and property survey into a single system for streamlined data access. SAVA Intelligent Energy System provides energy performance data and generates in-depth energy models for each property, including EPC ratings, heat loss analysis, and renewable energy potential.

A systematic survey is conducted across the entire stock, gathering data on:

- Building fabric (e.g. insulation, glazing)
- Heating systems and energy sources
- Renewable energy installations (if any)
- EPC (Energy Performance Certificate) ratings
- Data is synchronised between CIVICA CX and SAVA to ensure a unified view of the housing stock

From this information we will be able to identify energy performance gaps, prioritise properties requiring urgent upgrades and this will develop actionable insights to inform Target Energy Pathways.

Target Energy Pathways are designed to bring each property to the required energy efficiency standards while considering tenant needs and financial feasibility. The SAVA system generates tailored pathways for each property, focusing on achieving EPC ratings of C or better and supporting new-zero goals.



The specific actions Caerphilly Homes will be identifying include, installing high-performance insulation and triple glazing, a transition to renewable heating systems like air source heat pumps, adding renewable energy installations, such as solar PV. CIVICA CX will track and schedule these upgrades, ensuring timely execution.

SAVA provides a cost benefit analysis for each pathway, while Civica CX allows for effective budget tracking and financial planning. The integration of Civica CX and SAVA enables a clear, actionable roadmap for improving the energy efficiency of all properties in a cost effective and timely manner.

Civica CX and SAVA collectively enable data driven decision making by, identifying properties at the highest risk of fuel poverty, enabling us to prioritise, it highlights geographical clusters for efficiency focused programmes, and it allows incorporation of real time tenant feedback into planning.

Civica CX enables real time tracking of upgrade progress, while SAVA provides periodic energy performance updates. This ensures work is aligned with the defined pathways. Reports on compliance progress are generated using Civica CX, with detailed energy performance insights from SAVA. These reports can be shared with stakeholders to ensure accountability.

The SAVA system identifies optimal energy efficiency solutions, reducing tenant energy costs. By enhancing the insulation and heating systems and improving indoor comfort, Caerphilly Homes can improve the health outcomes of its tenants. The integration of renewable energy technologies supports national, and Caerphilly Council decarbonisation goals and reduces the environmental impact of the housing stock.

By utilising Civica CX and SAVA Intelligent Energy Systems Caerphilly Homes ensures a streamlined, data driven approach to Whole Stock Assessment and Target Energy Pathways. This integration enables effective planning, transparent reporting, and measurable progress, meeting WHQS requirements while enhancing tenant satisfaction and environmental responsibilities.

## **6d - Homes should suit the specific requirements of the household**

Social housing design can allow cultural identities to be created, maintained, and passed on across communities and generations. In addition to aesthetic values, cultural preferences inform housing. Both the housing exterior and interior play a role in shaping the extent to which families use their home. Other impacts of housing design and suitability include; health and wellbeing outcomes, comfort, cost of living, activities, and the extent to which they can be performed. This may include festivities, cooking, food storage, elderly care, childcare, community support, crafts, and language.

The demographic landscape in Caerphilly is changing, responding and changing to the shifting demographics, restructuring of household needs, family composition, and racial and age composition is important. Caerphilly County Borough has seen inward migration from those fleeing war and conflict, having arrived in Wales as nation of sanctuary. As these different identities embed within our communities, understanding their specific physical housing needs is important for now and the future.

Culturally appropriate design goes beyond cosmetic features such as murals or decoration and encompasses ways of inhabiting private and common spaces informed by cultural factors. Cultural needs could be bathing, space for religious practices and or internal layout. Such factors include family sizes and notions of private versus public space. Culturally appropriate spaces improve the well-being of people.

Currently the majority of people get treated the same, therefore analysing our tenant makeup looking to get much better tenant profiling and change the way we deliver which may be achieved in part by adopting a co-production model.

In addition to cultural need there are specific individual physical needs of our tenants. Caerphilly Homes employs 3 full time Community Occupational Therapists (Housing) who currently work across the housing service to support customers with the provision and maintenance of adaptations and the provision of accessible housing appropriate to their needs.

Customers can self-refer to Social Services for an occupational therapy assessment of their housing needs, with recommended works that are reasonable and practicable administered promptly by the Caerphilly Homes Adaptations Team. In addition, Caerphilly Homes intends to expand its OT team to ensure that those customers who are identified by WHQS Tenant Liaison Officers (TLO) as potentially having specific accessibility needs will be referred to, and assessed by, the Occupational Therapy (Housing) team in a timely manner. The OT will carry out an assessment of need and make recommendations to the WHQS surveyor of any adaptations/changes that may be required to the planned work to ensure that homes meet the specific requirements of the household. Contract holders / customers with culturally specific needs will also be identified by the TLO and supported by the Council's equalities team.

## **6e. Disabled and older people's housing requirements**

Currently, designated sheltered accommodation is for people aged 60 and over or those aged 55 and over with complex needs. This is likely to change in Summer 2025 when the Council's Cabinet consider changes to the existing Common Allocations Policy which proposes to lower the age of eligibility from 60 to 55. Caerphilly Homes currently manages 32 sheltered housing schemes throughout the County Borough, totalling 890 units of accommodation across all schemes. All are linked to Caerphilly Careline community alarm system and receive daily housing related support services from a Sheltered Housing Officer during a morning or

afternoon. Service charges are reviewed annually for the additional services provided as part of the sheltered housing service.

The schemes vary in make up:

- Flats and communal facilities in an under one roof building
- Bungalows and/or flats served by a separate communal block
- Flats and communal facilities under one roof building plus external blocks of flats/bungalows
- None of the retained/refurbished schemes have bedsit accommodation.

The Council has recently awarded a contract to Housing LIN to undertake research into the specific needs and aspirations of older people. The Council wishes to better understand the thoughts and views of older people to inform a review of its existing sheltered housing and older persons offer, its current service portfolio that aims to support older people and new build programme.

The research by Housing LIN will be undertaken in parallel with a comprehensive WHQS / HHSRS assessment of the Council's existing older persons designated stock portfolio. This will identify the older persons provision that is deemed future fit for purpose and can be upgraded to meet the new standard as well as those that are not fit for purpose and unable to be upgraded to meet the new standard (due to structural or mechanical related issues and which are therefore cost prohibitive).

The Council are seeking to commission an options appraisal of each scheme which:

- Establishes the physical quality of the accommodation.
- Determines the potential to achieve the minimum standards for WHQS 2023.
- Obtains a current and forecast EPC rating (if the scheme is thought to be able to achieve the requirements of WHQS23)
- Provides a view on the strategic value of each scheme given the needs identified in the LHMA and the outcome of the Later Living Research tendered by the Council's Housing Strategy team.

By building a comprehensive picture of each scheme's performance and sustainability, as well as taking into consideration the likely future demand for accommodation, the options appraisal will inform the Council's later living strategy to ensure that existing and future sheltered accommodation best meets the needs and aspirations of residents and potential occupants.

Consultants appointed by the Council are expected to provide a comprehensive sheltered scheme stock condition survey to determine the age, condition, and remaining lifespan of each scheme together with individual components, from which future works, and their associated costs can be predicted.

Key areas to review include:

Is the scheme located in an area where there is a need for later living accommodation? Is the scheme accessible for those with limited mobility and located near to amenities such as GP's/post offices/supermarkets, public transport, active travel routes etc? Appointed consultants will be asked to refer to the Local Housing Market Assessment and the Housing Strategy Officer for further advice.

If the building is deemed capable of meeting WHQS23, the estimated costs involved in upgrading the building to meet those standards will need to be reviewed to consider whether a retrofit scheme would deliver best value for money? A Targeted Energy Pathway will be required for each building.

Is the size of the accommodation, existing layout of the scheme, and amenities provided, fit for purpose and commensurate with what residents and potential occupants are looking for as they get older? The value and future need for communal facilities including lounges, laundry and drying rooms should also be explored.

If the scheme is not in an area where there is an identified need for later living accommodation (as noted within the LHMA), does the scheme have the potential to be re-designated as general needs accommodation, supported accommodation, accommodation for users with complex physical needs or temporary accommodation for example?

In undertaking an assessment of each scheme, consideration will be given to best value i.e. would it be better value to demolish the scheme and rebuild a replacement, compliant later living scheme or a new build development designed to meet the needs identified in the LHMA?

If a scheme can achieve WHQS23 with investment, does it require future proofing regarding:

- Smart technology if a resident requires it i.e. to activate lighting, heating, security, window, and door opening etc.
- IP door entry (Internet-Protocol based technology), IP Access Control, IP Telephony System, IP CCTV, Wi-Fi, all integrated with mobile phone apps.
- Storage and charging space for mobility scooters.
- Space for built in appliances e.g. washing machines, washer dryers to eliminate the need for laundry/drying rooms.

The Council has already approved decommissioning schemes due to an inability to meet the required standards. One of the decommissioned schemes has already closed (Castle Court) and is scheduled to be demolished and replaced with general needs accommodation. Two further sheltered housing schemes are scheduled for closure in 2025. Existing residents will move into the Council's flagship later living scheme at Ty Darran, Risca in Autumn 2025.

The Council understands that the needs of older people are changing and wishes to encourage older people who may be occupying family homes to consider moving into accommodation that is more efficient and better meets their needs. As a result, the research undertaken by Housing LIN and the WHQS assessment of existing older persons stock will inform the delivery of the Council's development programme and future later living provision.

In relation to accessible accommodation, the Council operates a property coding system to identify the accessibility of units of accommodation, and to best match properties with applicant needs. The Occupational Therapists (Housing) will advise the WHQS and development teams of any specific requirements that will need to be met to improve accessibility in particular property types or areas of the county borough. Lifetime Homes and higher accessibility requirements and standards will be properly considered during the refurbishment process and implemented where reasonable and practicable and in accordance with the duty for reasonable adjustments. Details of specific needs will be identified during the WHQS survey and also via the Council's Common Housing Register, which incorporates an accessible housing register.

The overall aim of the Council's approach is to ensure that people can live independently at home for as long as possible.

The RNIB Visibly Better standard will be adhered to, and a specialist range of kitchens and bathrooms is available to contract holders / customers who require a RNIB kitchen and bathroom. Dementia Friendly accommodation is also available to those who require it.

## **8b. Attractive Outside Spaces**

Historic investment via the WHQS programme has seen the Council commit over £13m to deliver against Part 6 of the standard that specified that dwellings should be in attractive and safe environments. Funds were committed across the county borough to facilitate greater off-street parking, greater accessibility to amenities through the provision of dropped curbs etc, environmental improvements and planting schemes, together with amenities including skateparks and play areas, to address issues of anti-social behaviour and litter. In total, 82 communities were consulted and engaged in the programme to identify measures that would ensure compliance with Part 6 of the standard.



The Council currently employs 2 environmental officers who work in conjunction with the estate management teams. These officers are responsible for engaging with communities to identify minor environmental improvements that seek to ensure that informal areas within the Council's housing portfolio are well maintained, attractive, safe and include spaces where people can meet and interact with one another, enjoy exercise and enjoy fresh air.

The Council also employs 6 community environmental wardens whose role includes ensuring that housing areas are free from litter.

Maintenance of existing outside space is managed as business as usual either direct from the council teams or by Caerphilly Home direct. The wider review of the stock portfolio will consider and review where there are more fundamental changes that may be required to ensure the outside space is used for the purpose it was created such as MUGAs or green accessible areas designed for resident use which can have a very positive impact on the wellbeing of Caerphilly Homes tenants.

**8C. Biodiversity opportunities should be introduced by landlords who own or manage verges, parks, grounds and open green spaces by changing the management of these areas to make them more wildlife friendly.**

As the custodian of the county borough, the Council manages almost all verges, public parks, grounds and open green spaces. It also employs a dedicated range of Parks and Countryside professionals including ecologists and landscape architects who are employed specifically to tackle the nature and climate emergencies, through promoting biodiversity via the sensitive management of verges and all public spaces. In 2019 Caerphilly became only the second council in Gwent to declare a climate emergency and commit to becoming carbon neutral by 2030.

In November 2020, the Council adopted its Green Infrastructure Strategy which aims to build on the significant work already carried out by the Council to develop Caerphilly into a green and healthy place to live with an established, multi-functional green infrastructure of high-quality spaces; interlinked by a network of corridors that benefit both people and nature.

Tree planting initiatives have been undertaken, which saw dedicated volunteers' plant 4,500 trees at Ynys Hywel Farm, that links to Sirhowy Valley Country Park, delivering a significant wildlife corridor between the Graig Goch Local Nature Reserve, NRW woodland and the River Sirhowy. An additional 27,600 trees have also been contract planted on an adjacent site. Plans are underway to identify underutilised HRA land (which cannot be developed for new homes) for use as community tree planting areas throughout the borough.

The 'Nature isn't Neat' approach to grass-cutting was approved by the Council in December 2021, whereby highway verge and by-pass route mowing is kept to a minimum, and a list of areas were nominated by local members within their respective wards, which could be allowed to flourish during the summer period,



enhancing the local environment and creating wildlife and pollinator corridors. No Mow May is a period in which the Council seeks not to mow any of its verges or public open spaces to encourage flowering meadows and hedgerows.

The Council is currently in the process of developing its Local Development Plan. In line with Future Wales: The National Plan 2040, Policy 9 (Resilient Ecological Networks and Green Infrastructure), the Caerphilly Preferred Strategy will emerge from a nature-based approach, that takes as its starting point the need to take action to maintain and enhance biodiversity (to provide a net benefit) and uses a nature based approach as a key mechanism for securing sustainable growth, ecological connectivity, social equality and well-being.

When considering compliance with WHQS, the opportunity to enhance existing biodiversity and achieve biodiversity net gain will always be the starting point. Caerphilly's green infrastructure provides enjoyment, relaxation, inspiration and wellbeing for local people and visitors. This enhances a distinct local identity, resulting sense of place and an expression of the cultural heritage of the area. Retrofitting opportunities such as green roofs, bat and bird boxes, traffic calming, street scape and new tree planting corridors will be explored as part of the programme.

## **Broadband**

BT Openreach build and maintain the digital network that enables providers to deliver broadband to homes and businesses across Caerphilly County Borough. Having secured contracts under the [Project Gigabit](#) scheme, they are aiming to extend networks capable of delivering download speeds of 1000Mbps+ (1Gbps) and uploads of 200Mbps+ across the county borough.

The Council have discussed with BT Openreach the requirement to ensure that all contract holders have access to broadband. They have indicated that this would be fully progressed through their Borough wide programmes, other than in a small minority of areas (0.54%) where they have already identified that 'fibre to the premises' (FTTP) compliance is likely to be problematic. They have been provided with postcodes for all Caerphilly Homes properties to enable them to cross reference their data and advise which of those areas could prove problematic for compliance. However, they currently expect this to be non-residential premises such as pumping stations etc.

The Council is supportive of requests for consent for installation of broadband into its properties. In 2024 the Council entered into an omnibus wayleave agreement with BT Openreach for the installation of FTTP into our multi dwelling stock to support greater coverage of FTTP. A procedure has been agreed for signing off and approving each wayleave proposal to support BT Openreach's upgrade programme and is already being utilised for sheltered housing schemes currently in scope.

The Council has undertaken a comprehensive mobile coverage mapping project. The findings provided digital intelligence to allow analysis of the performance of mobile networks using independent data and insight coverage maps which produce accurate measurements of mobile data coverage.

The project provided accurate area and property level information about mobile data coverage across the county borough. As mobile coverage data is coupled with fixed line broadband speed data, homes can be identified where a suitably fast connection is not available from either solution.

A free easy to use tool could be promoted, to all contract holders, allowing them to understand which mobile networks offer the fastest speeds immediately outside of their home. The coverage checker features data physically collected outside most addresses within the borough for EE, Vodafone, Three and O2. This initiative was part of our corporate commitment to ensuring all residents have access to reliable information about their connectivity options within the county.

Ofgem also provide a mobile and broadband checker that enables users to view predicted indoor and outdoor mobile coverage, or availability of broadband services, for an address or postcode area by provider.

## **7 Cost Prohibitive Activity**

We are currently undertaking a full stock assessment, once this is complete, we will have this information.

## 8 Target Energy Pathways Narrative

### Approach to Generating Target Energy Pathways

The Target Energy Pathways (TEP) will be designed with a structured, data-driven approach to meet the Welsh Housing Quality Standards (WHQS23) requirements for energy efficiency. This process includes:

- Baseline assessments – Conducting a detailed energy performance review of each property using Energy Performance Certificates (EPCs) and other energy usage data.
- Modelling Scenarios – Utilising the SAVA Intelligent Energy System to model various improvement scenarios, identifying energy-saving upgrades for properties to meet WHQS standards. Scenarios include upgrades for properties to meet WHQS standards. Scenarios include insulation improvements, renewable energy installations, and glazing renewals.
- Customisation by Archetype – Adapting improvement recommendations to the specific needs of each property type (archetype) to ensure solutions are both technically and financially feasible.
- Pathway Development – Developing Target Energy Pathways for each property, which outlines step-by-step energy upgrades needed to meet compliance. Pathways prioritise cost-effectiveness and practical implementation within regulatory timelines.

### The Asset Systems Used to Gather, Record and Process Information

The generation of TEP's is supported by an integrated asset management framework, including:

- SAVA Intelligent Energy System – This system serves as the primary platform for energy modelling and TEP generation. It interfaces with the Housing Management System (CX) to consolidate data, providing a comprehensive energy profile for each property. It also integrates with Elmhurst EPC data, which provides critical inputs for the SAVA system to perform energy modelling accurately.
- Housing Management System (CX) – CX stores property details, maintenance history, and relevant tenant information.
- Elmhurst Energy Integration – Automated EPC data imports from Elmhurst provide up-to-date energy efficiency ratings, which are essential for creating reliable and compliant energy models.

## **Data Improvement Plan**

A data Improvement Plan will be developed to ensure data quality, accuracy, and completeness over time.

- Data Cleansing and Verification – regular data audits are being considered to identify and rectify gaps or inaccuracies in property records and EPC data
- Full Stock condition Survey – a full stock condition survey is being conducted to ensure up to date information on all properties
- Ongoing monitoring – Established a robust verification process on each stock condition survey and HHSRS assessment in the asset management systems, ensuring accuracy of the data
- Staff Training – Training staff on WHQS and HHSRS to ensure the correct information is being fed back into the asset management system

## **Information on Significant Property Archetypes**

Caerphilly Homes will effectively manage its properties by categorising them based on archetype during the Whole Stock assessment, using this data to develop Target Energy Pathways tailored to each property type. By understanding the specific characteristics, energy performance, and maintenance needs of archetypes such as pre-1919 homes, post war constructions and modern builds, Caerphilly Homes can prioritise upgrades, allocate resources effectively, and plan decarbonisation strategies aligned with Net Zero goals.

This targeted approach will enable Caerphilly Homes to improve energy efficiency, enhance tenant comfort, and reduce fuel poverty while meeting compliance standards like WHQS. The effect will be a more sustainable and cost-effective housing portfolio, better tenant satisfaction, and a significant contribution to the environmental objectives.

## **Information on Homes that will not meet standards (WHQS 3a and 3b)**

In some cases, it may not be possible to bring certain properties up to the energy standards set out in WHQS 3a and 3b due to factors such as:

- Architectural Limitations – Some older or listed properties cannot undergo certain energy upgrades (e.g., external wall insulation) due to historical preservation requirements
- Technical Feasibility – In cases where the structural design of a property limits the effectiveness of proposed improvements, meeting full compliance is challenging

- Cost constraints – For specific properties, the cost of compliance with WHQS standards may be prohibitively high, requiring a practical exemption or deferred approach
- Tenant Occupancy – Where significant improvements would cause prolonged disruption to tenants, alternative interim measures may be adopted until full compliance can be achieved.

For properties that cannot reach full WHQS compliance, these cases will be documented with supporting rationale, and alternative efficiency measures will be explored where possible.

## 9 Redevelopment, Demolition and Carbon

In accordance with the Welsh Housing Quality Standards (WHQS23) and Welsh Development Quality Requirements (WDQR 2021), there is a commitment to incorporating carbon considerations into the assessment of options for any proposed redevelopment or demolition projects. Achieving this by conducting a detailed assessment of both embodied and operational carbon impacts using a recognised methodology, such as RICS Professional Statement 'Whole Life Carbon Assessment for the Built Environment'. This approach will allow comparison of the carbon implications of retrofitting existing homes against the carbon cost of demolition and redevelopment.

For each proposal, an evaluation of the potential to reduce upfront and embodied carbon during design, construction, and refurbishment phases, ensuring alignment with best practices in moving toward a decarbonised and circular built environment. By considering these factors holistically, the aim is to make informed decisions that balance environmental sustainability with long term housing quality and affordability. Comprehensive assessments and justifications for chosen options will be documented and presented to demonstrate compliance with these requirements. This commitment supports the overarching goal of reducing the carbon footprint while maintaining high standards of housing for tenants.

The Council has committed to developing 1000 new, low carbon affordable homes by 2033. In September 2023 it published its Development and Governance Strategy which sets out the Council's ambition and the governance framework and standards that underpin the delivery of the ambition including compliance with Welsh Government related standards, statutory requirements and professional RICS procedures.

## 10 Community Benefits

The Council recognises its role as one of the largest users of goods and services from both the private and voluntary sectors. It is also the custodian of its communities. When considering spend within the context of the Future Generations (Wales) Act, Socio Economic Duty and WPPN 01/20, the Council is committed to ensuring that any spend committed to meet the WHQS23 is also used to maximise the economic, social, cultural and environmental impact of its investment for the benefit of the people of Caerphilly and Wales.

It understands that the investment in homes to achieve the Welsh Housing Quality Standard 2023 doesn't only ensure that homes are fit for purpose and habitation, but also acts as a key economic catalyst in areas particularly where the economy is stalled or stagnant. By delivering its obligations to tenants and customers, the Council, will use investment in its existing housing stock to generate new economic opportunities for jobs, training, skills development and education. Supporting the foundational and circular economies and ensuring that local supply chains are supported and in the best position possible to take advantage of the new opportunities created as a result of this investment.

It will ensure that those who are the most vulnerable in society benefit directly. It will do this through its existing provision of employment support (funded currently by SPF), its relationship with its communities via Caerphilly Cares, Supporting People and its employment team; and through its direct relationship with tenants and customers. These resources will be matched with contractors who are awarded contracts with the Council and who undertake work on its behalf, thereby ensuring that the opportunities created, and the impact of the Council's spend reaches those who need it most.

Following guidance and legislation introduced by the Welsh Government, the Council has incorporated processes and procedures into its procurement activity to ensure that there is a clear focus on and prioritisation of the delivery of social, economic and environmental benefits, this ensures that community benefits and social value are key considerations through the Council's delivery of the Welsh Housing Quality Standard (WHQS).

The Council is committed to including Social Value in its procurements of £75,000 or more.

The Council delivers on this commitment through a performance and evidence-based approach, using the National TOMs (Themes, Outcomes and Measures) for Wales. As part of this, Contractors must demonstrate how they will deliver social value, such as local employment opportunities, apprenticeships, and community and sustainability initiatives. A social value plan will be required from all contractors who are awarded contracts to deliver work required as part of the WHQS. Suppliers will be provided with advice, guidance and hands-on support during the preparation of their social value plan and their TOMs submission. The monitoring of social value delivery forms a key part of the Council's contract management approach.


In certain circumstances, the Council will award WHQS related contracts via direct award call-offs using third-party framework agreements. The Council has awarded several contracts via the Welsh Procurement Alliance to support the delivery of WHQS, and as a Welsh Procurement Alliance committee partner, the Council is able to benefit from the WPA Community Benefit Fund. The Community Benefit Fund is utilised by the Council to reinvest funds generated by WPA activity back into Caerphilly County Borough and to add value to existing initiatives.

The Council employs dedicated Supplier Relationship Officers whose principal duties include facilitating supplier engagement and providing support to SMEs during tender processes. This support focuses on the participation of local SMEs in the Council's procurement activity and continues through to contract management where Supplier Relationship Officers support the monitoring and delivery of social value by Contractors.

Contractors involved with the delivery of WHQS are required to pay their employees at least the Living Wage, ensuring fair compensation for all workers involved in our procurement activity.



## Appendix A – WHQS Compliance Certificate

<h3 style="margin: 0;">Caerphilly Homes</h3> <h3 style="margin: 0;">Welsh Housing Quality Standard</h3> <h3 style="margin: 0;">Certificate of Compliance</h3>			
Property Address:		Date:	

Welsh Government has set a new Welsh Housing Quality Standard (WHQS) that tells landlords how to make their homes better by 2034. This certificate shows whether your home passes the new standard yet.

Your home has been checked against each part of the Standard.

It is not possible for some properties to be improved to meet all parts of the standard, but if your home can be improved to meet the standard, we will carry out the work needed before 2034. We will let you know about this work when we are planning it.

The table below shows the different parts of the Standard, and the tick boxes show if your home passes the Standard now or still needs some work to be done.

<i>WHQS Compliance Summary</i>		<i>Pass</i>	<i>Needs work</i>	<i>Comments</i>
1	<b>Be in good condition</b>	<input type="checkbox"/>	<input type="checkbox"/>	
2	<b>Be safe and secure</b>	<input type="checkbox"/>	<input type="checkbox"/>	
3	<b>Be affordable to heat and have minimal environmental impact (see your Energy Performance Certificate for details)</b>	<input type="checkbox"/>	<input type="checkbox"/>	
4	<b>Has a kitchen and bathroom that is up-to-date and in good condition</b>	<input type="checkbox"/>	<input type="checkbox"/>	
5	<b>Is comfortable and suits the person living there</b>	<input type="checkbox"/>	<input type="checkbox"/>	
6	<b>Has a suitable garden for you to use (if possible)</b>	<input type="checkbox"/>	<input type="checkbox"/>	
7	<b>Has nice outdoor space around your home</b>	<input type="checkbox"/>	<input type="checkbox"/>	

For more details about the Welsh Housing Quality Standard 2023, you can view the full document online at <https://www.gov.wales/sites/default/files/publications/2024-06/welsh-housing-quality-standard-2023.pdf>.