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Housing Need and Demand Assessment (HNDA)

A Practitioner's Guide (2018)

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What's New and Refreshed in 2018?

- All three HNDA guides been refreshed based on the latest available data, feedback from HNDA practitioners and universal themes and issues that have arisen over the past several years during the HNDA appraisal process. However, the fundamental approach and process remains largely the same.

- The Scottish Government (SG) is currently progressing a Planning Bill which is expected to have completed the parliamentary processes by the end of 2018 with a view to receiving Royal Assent by 2019. This will be followed by revised National Planning Framework 4, Scottish Planning Policy and revised Local Housing Strategy guidance. It is envisaged that any changes will be known and reflected in the HNDA guidance and Tool during 2019.

- It is not anticipated that the Planning Bill will impact on the requirement for HNDA or the role that it serves in supporting Local Housing Strategies and Development Plans. Where the Planning Review suggests ways in which existing HNDAs could be amended or strengthened, these will be investigated where the CHMA consider them to be feasible for data providers. Local authorities wishing to undertake an HNDA should continue to follow this guidance and to operate in terms of 'business as usual'.

- Key guidance changes include:

  > as part of the 'robust and credible' appraisal authorities will be required to consult with external stakeholders and report on their findings.

- Key HNDA Tool changes include:

  > HaTAP is no longer the core measure of existing housing need. This is now a count of homeless households in temporary accommodation and households that are both overcrowded *and* concealed (HoTOC).

  > New data inputted for household projection, existing need (as above), house prices, rent prices and incomes (with the latter using the new SG income dataset).

> All scenarios have been updated based on the latest economic outlook. More details of the evidence used and the default setting are set out in the HNDA Tool Instructions (2018). The scenarios have been reduced in number and have different names.

> The proportion of households who are assumed to be able to afford a property has been increased based on evidence of greater access to mortgage finance since the Tool was set up.

> For simplification, fewer results sheets.

Key Points for HNDA Practitioners

Guidance Aim

- To give step-by-step guidance on how to produce an HNDA and use the HNDA Tool (Excel) to calculate the number of additional housing units, by tenure, that are needed in future.

- It should be used in conjunction with the HNDA [Manager's Guide](), the HNDA [Tool Instruction]() and the HNDA Datapack as provided to Local and Planning Authorities yearly.

HNDAs and the Rest of the Housing-Planning Process

- HNDAs are designed to give broad, long-run estimates of what future housing need might be, rather than precision estimates. They provide an evidence-base to inform housing policy decisions in Local Housing Strategy (LHS) and land allocation decision in Development Plans.

- An HNDA is **just the first step** in this housing-planning process and HNDA housing estimates derived get refined (higher or lower) in the LHS Housing Supply Targets (HSTs). Factors such as housing policies, available finance and capacity of the construction sector are used to translate the HNDA estimates into the HST. **In Development Plans a generous supply of land for housing is based on the HST NOT the HNDA figure.**

- The Tool output is one part of an HNDA; the full HNDA evidences specialist housing need and stock profile, pressures and management issues. All parts are required for housing policy and planning decisions.

- HNDAs should be around 100 pages for unitary authorities but somewhat longer for City regions where authorities are working together jointly. When referring to HNDA results the term is '**housing estimate' NOT 'housing requirement'**

- Each step of this housing-planning process informs the next step. Therefore a detailed timeline should be put in place jointly by housing and planning officials to ensure that each step takes place at the right time. A [diagram]() showing the correct alignment is provided.

- HNDAs are undertaken at Housing Market Area (HMA) level. This is required for LHSs which require estimates of affordable and market housing at HMA level and for Development Plans which require land to be allocated for affordable and market housing at HMA level.

CHAPTER 1: Introduction

Legislation

1.1   The Housing (Scotland) Act 2001 places a responsibility on Local Authorities   to prepare a Local Housing Strategy (LHS) supported by an assessment of housing need and demand and the provision of related services. An HNDA serves to provide this assessment.

1.2   The Town and Country Planning (Scotland) Act 1997 (as amended), requires Local and Strategic Planning Authorities to plan for land use in their area, including the allocation of land for housing. The HNDA informs this process.

1.3   The HNDA Tool calculates housing need and in doing so gives practitioners more time to consider which scenarios to run in the Tool and what the findings mean for the LHS and Development Plan. The Tool enables local authorities to develop long-term strategic views of housing need and demand based on nationally produced data sets. Whilst the CHMA would strongly advise its use, it is not mandatory. If alternative approaches are used they must be explained and satisfy the core criteria for robust and credible status.

Robust and Credible Appraisal

1.4   On completion, the CHMA appraise the process and methodology used to produce HNDAs using the core criteria set out at Annex A.   The CHMA provides a narrative against each criterion in its appraisal.

1.5   It should be noted, that the appraisal process **does not** extend to agreeing the estimates themselves. There are four core outputs and a six point process checklist.

1.6   The CHMA appraise HNDAs as being **either** robust and credible **or** as having the potential to be so, subject to an authority satisfactorily implementing the recommendations of the appraisal.   Copies of HNDA Tool (Excel) containing the raw data should be submitted to the CHMA to facilitate the robust and credible appraisal.

1.7 The Directorate for Planning and Environmental Appeals has commented that, where the CHMA has confirmed that an HNDA is robust and credible,

the approach used should not be subject to any further procedure at a Development Plan examination.

1.8 Any discussion at examination is therefore expected to focus on issues raised in representations that relate to the proposed policies and housing allocations included in the proposed Development Plan and their relationship with the findings of the HNDA. It should be noted however that the HNDA guidance and appraisal process do not supersede Part 4 of the Town and Country Planning (Development Planning)(Scotland) Regulations 2008.

1.9 Authorities are encouraged to be fully transparent about the processes and decision-making that underpin the HNDA. In this spirit, the Scottish Government would encourage authorities to publish as much material as possible, for example, minutes of meeting, copies of the HNDA Tool, robust and credible appraisal letter etc.

Existing[1] and Future Housing Need & Demand

1.10 Estimates of housing need and demand fall into two categories and HNDAs must evidence both. These are:

- **future need** for households yet to form, and

- **existing need** experienced by households at the present time.

1.11 Future need is mainly driven by future household formation (projections). By its very nature this has to be met through the provision of **additional housing units**. This is what the HNDA Tool outputs. Most additional housing units will be delivered through new build, but delivery should also be considered through changes in housing stock such as conversions and bringing empty properties back into use. The actual amount and type of additional units that can to be delivered is decided in the **Housing Supply Target**.

1.12 Existing need is driven by several factors such as homelessness, overcrowding, care and support needs, etc. A list of factors that can contribute to existing need is set out at Annex D, together with a list of data sources. Most existing need is met using in-situ solutions e.g. adaptations, transfers, stock improvements, etc. However, a small proportion of need must be met through **additional housing units** where an in-situ solution cannot be found e.g. for homeless households, etc.

1.13 Existing need is considered at three points in the HNDA:

- **Chapter 3 – existing need that requires an in-situ solution** e.g. care and support needs should be analysed as part of evidence-base on housing stock profile, pressures and management

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[1] Sometimes referred to as 'backlog need'.

This will inform future housing policy on the type of stock to provide, how to reduce stock pressures and other stock management issues.

- **Chapter 4 - existing need that requires additional housing units** is used in the HNDA Tool.

  A core scenario has been pre-programmed into the Tool using combined count of homeless households in temporary accommodation and households that are both overcrowded *and* concealed (HoTOC).

  Alternatively authorities may estimate their own estimate of households in existing need who need a new housing unit and input this direct into the Tool. However, there must be a strong rationale for this approach with a full write-up of the method employed provided in the HNDA.

  This will inform the HST in the LHS.

- **Chapter 5 - existing need that requires some form of specialist housing** and/or housing-related service e.g. adaptations, etc.

  This will inform policy on Specialist Provision.

  This will inform policy on the type of stock to provide, how to reduce stock pressures and other stock management issues.

Using HNDA Evidence for Housing Policy and Planning Decisions

1.15 As the purpose of an HNDA is to provide an evidence-base to inform the LHS and Development Plan, **there should be a clear read across between all three documents. Any HNDA evidence that is used in LHS or Development Plan must be properly referenced including the HNDA table number etc.** Housing and planning officials should work together on HNDA production to achieve this.

1.16 To support this, key issues tables are provided at the end of each chapter (with a full set at Annex C). Together, these set out the key HNDA issues that colleagues with responsibility for LHSs and Development Plans may wish to consider for housing policy and land planning purposes.

1.17 Specifically, it is expected that the HNDA should underpin the following key areas of housing policy and planning:

- **Housing Supply Target(s) (HSTs)** - to inform the setting of a HST for use in the LHS and Development Plan. The HST sets out a realistic amount and type of housing that will actually be delivered on the ground

over the period of the plan(s). This can be higher or lower than the HNDA housing estimate for example if an authority has an aspiration to growth. For more details on the HST see the Managers Guide.

- **Stock management** - to assist understanding of the current and future demand for housing by **size, type, tenure** and **location** in order to optimise the provision, management and use of housing stock. This in turns feeds into policy and planning decisions about future stock in the LHS.

  The HNDA Tool does NOT estimate the **size or type of stock** that is required in future but instead the tenure. Evidence on the size and type of current stock are set out in Chapter 3 of the HNDA and this should go on to inform future size and type of policy decisions in the LHS.

- **Housing investment** - to inform future housing investment decisions, for example through Strategic Housing Investment Plans (SHIPs).

- **Specialist Provision** - to inform the provision and use of specialist housing and housing-related services to enable independent living for all, as expressed in policy in the LHS and to inform planning decisions e.g. land for Gypsy/Travellers. See Chapter 5 for more information on Specialist Provision.

- **Geographic distribution of land** - to inform the spatial allocation of land through the Development Plan for new housing at both Housing Market Area level and Local Authority level.

Timetabling

1.18 Given that the HNDA is used to inform the Development Plan (LDP) and LHS, **it is important that these documents are timetabled to take account of the HNDA findings**. Housing and planning teams should work together to achieve this.

1.19 It is expected that HNDAs should be undertaken in good time to inform the development of the both the LDP and LHS. The alignment of the above reports is illustrated diagrammatically.

Governance and Consultation

1.21 HNDA production and sign-off will be overseen by a **Housing Market Partnership (HMP)**.

1.22 Members should include housing and planning officials from within the authority. It will also be useful to invite the following to sit on the HMP: National Parks (as appropriate), colleagues from Health, Care and Social

Work Departments (bearing in mind housing, health and social care agenda) and colleagues with expertise in economics or statistics.

1.23 The HMP **must** ensure consultation with all appropriate stakeholders during the development of the HNDA. Good practice would see HMP members working together and addressing issues throughout the HNDA production process. The final HNDA will then include details of the consultation, feedback and action taken.

1.24 To achieve robust and credible status, the completed HNDA must be signed-off by the Head(s) of Housing and Planning or the designated senior official at the point of submission. Should Local Authorities have jointly produced an HNDA, all constituent authorities must agree the core outputs and include a statement to this effect as part of the official sign-off document.

1.25 **External stakeholders** are central to the HNDA process. Stakeholders are likely to include a mix of housing experts e.g. developers, RSLs, tenant organisations, estate agents, letting agents and those people who require Specialist Provision including Gypsy/Travellers (or their representatives e.g. equality or support groups). All stakeholders should be engaged in a way that best suits all parties. **The HNDA should detail what stakeholders have told authorities and show this has been taken into account in the HNDA.**

1.26 Methods of consultation can include, participation in the HMP, online consultation with specific questions, focus groups or other appropriate community engagement. Hard to reach groups (both locationally and type) may require particular consideration at the start of the process.

Narrative content and report length

1.30 The following bullet points provide examples of good practice for determining the content and size of HNDAs:

- use the template provided to summarise key findings and include this at the start of the HNDA. This is required to satisfy Core Process 5.

- focus on evidence and analysis, **NOT** policy or contextual descriptions

- explain all decisions, assumptions, choices and scenarios in full

- avoid statements that are not factual e.g. anecdote or inference

- keep the contents closely aligned to what is required by the core outputs and process checklist and as laid out in this guidance

- use the proof-reading stage to strip out any unnecessary content and use annexes to minimise the main body of the report

- place supporting documents on websites using hyperlinks e.g. local stock condition surveys, minutes of HMP/stakeholder meetings.

- There is no need to explain methodologies that have been explained robustly elsewhere, for example household projections are explained fully on the NRS website and a link to these is sufficient.

Quality Assurance

1.31   The CHMA has a general role to support authorities with HNDA production and a formal role to appraise HNDAs as robust and credible.

1.32   To a large extent this involves working with authorities to quality assure both the process and the content of the report. This is reflected in Core Process 3.

1.33   Some of the quality assurance procedures that are essential for robust and credible status include:

Triangulation. Where there are several competing data sources e.g. for current need calculations, compare each to decide which is the best quality and document this process in the report. This provides a level of assurance that the data used in HNDA calculations are fit-for-purpose.

Substantive quality assurance statement. A full statement (one or two pages) should be included in the report setting out each quality assurance procedure.

Methodologies set out in full. As HNDAs are technical and analytical in nature it is essential that methodologies are explained in full, to an extent that would allow close technical scrutiny of findings.

Proof-reading. Final draft HNDAs must be thoroughly proof-read. This includes that figures in the narrative match those in tables, figures are arithmetically correct, figures are rounded consistently, data are fully sourced and figures/ charts are labelled in full and consistently - including any footnotes, caveats or health warnings.

1.34 Some additional measures include:

- using official or recognised data sources wherever possible; and

- ensuring that local data have been checked and cleaned and **that this has been described in the HNDA.**

Geographies

1.35 HNDAs use a range of geographies, each of which has a specific use in LHSs and Development Plans. Some chapters of the HNDA may only require presentation at local authority level, others at Housing Market Area (HMA) level. Avoiding unnecessary disaggregation will reduce the complexity of the HNDA and the amount of time and resource needed for drafting.

1.37 The HNDA Tool is populated with HMA geographies supplied to the Scottish Government by authorities. The HMAs are based on the latest 2011 datazones. There are around 100 HMAs across Scotland and a map of these is shown in the Tool.

1.38 HMAs represent geographic areas where high volumes of people are both buying and selling homes i.e. a relatively self-contained housing market. There are several methods for estimating HMAs and these are set out in Local Housing System Analysis (LHSA) Good Practice Guide.

1.39 Rurality may present some specific issues for defining and HMA - especially in sparsely populated areas with small numbers of property sales. The LHSA Good Practice Guide suggests ways in which to mitigate such issues. Rurality is also addressed in Q&As on the CHMA website.

National Park Authorities

1.40 Although National Parks are the Planning Authority for their areas, Local Authorities remain the strategic housing authority. To plan for housing and create a park-level evidence-base for this purpose, parks and Local Authorities should work in partnership to prepare HNDAs.

1.41 Unlike Local Authorities, National Parks do not have a duty to prepare an LHS, however Scottish Planning Policy(SPP) states that LDPs for the Parks should draw on the evidence provided by the HNDAs of the relevant housing authorities.

1.42 SPP states that National Park Authorities are not required to meet housing requirements in full within the park but should liaise with neighbouring authorities to deliver housing and ensure that a 5-year supply of effective land is maintained across the HMA.

1.43 The HNDA Tool has been set-up in such a way as to estimate housing need and demand in each local authority section of the National Parks. This was designed with the above requirement in mind. However, it would be advisable for National Parks to work jointly with local authorities on deciding

what scenarios to run in the Tool and to understand how the Tool works. It would be helpful for National Park representatives to sit on the HMPs of constituent authorities.

1.44 It is suggested that National Parks use the estimates of housing need and demand set out in local authority HNDAs; and write this up in a concise analytical report. Support and advice on this will be provided by the CHMA.

Equality Considerations

1.45 The Equality Act 2010 introduced a public sector Equality Duty in April 2011 to:

- **eliminate discrimination, harassment and victimisation**
- **advance equality of opportunity**
- **foster good relations.**

1.46 The Statutory Duty requires consideration of the above in respect of the following protected characteristics:

- **age**
- **disability**
- **sex (including pregnancy and maternity)**
- **gender reassignment**
- **sexual orientation**
- **race**
- **religion and belief.**

1.47 The HNDA should give due consideration to the requirements of the Act, particularly around evidence on the Specialist Provision requirements of local populations. Several aspects of the above duties will be addressed in Chapter 5 on Specialist Provision.

1.48 It is a requirement to undertake an Equality Impact Assessment (EQIA) on any policy or strategy that has an impact on people. It should be noted that the EQIA process is not just about identifying and mitigating negative impacts, it is about proactively looking for opportunities to promote equality.

1.49 An HNDA evidence-base should contribute to the EQIA for the LHS and Development Plan. During the course of drafting the HNDA, particularly around Specialist Provision, authorities will have considered at least four of the seven protected characteristics (age, disability, sex and race). It is not expected that authorities will cover all protected characteristics if they do not impact on housing need and demand. However, the reasons for not covering a characteristic should be clearly explained.

Housing Estimate 'vs' Housing Supply Target(s)

1.50 HNDAs produce a range of future housing estimates. This is an estimate of the TOTAL amount of housing need and demand in an area. The housing estimate then helps to determine the Housing Supply Target (HST). **The HST is NOT part of the HNDA process**, it is the next stage of the housing planning process **AFTER** the HNDA.

1.51 The HST feeds into both LHSs and Development Plans. It sets out the additional housing that can realistically be **delivered** over the period of the plan. The HST represents a policy-based interpretation of the HNDA and therefore should be considered separately to the HNDA (see figure 2).

1.52 Local Authority housing and planning functions should work together to jointly agree the HST which in turn should be agreed by all strategic and local authority interests in the HMP, to ensure consistency to delivery across local authority and housing market boundaries.

1.53 Consideration of these factors could result in a HST figure which is lower or higher than the housing estimate in the HNDA.

1.54 Authorities should consider setting the HST, following the HNDA. It may be helpful to do this in a short, standalone HST paper (see diagram 2 & figure 3). More Guidance on HST is set out in the Manager's Guide. Generic guidance on effective target setting (from an analytical perspective) is also available.

Further Advice

1.56 For advice about this guidance or HNDAs in general, please contact the Scottish Government CHMA using the CHMA Mailbox.

CHAPTER 2: Key Housing Market Drivers

SECTION 1 – INTRODUCTION

Chapter Aim

2.1 How to source and evidence the key demographic and economic drivers of local housing markets.

2.2 To foster an understanding of why and how these data are used to estimate housing need and demand in the HNDA Tool (see HNDA flow diagram).

2.3 To help inform which future demographic and affordability scenarios are run in the HNDA Tool.

Core Output 1

2.4 For robust and credible status HNDAs must satisfy all core outputs and processes, including Core Output 1:

Key housing market drivers:

- Identifies key factors driving the local housing market,

- including household formation, population and migration, housing affordability including income, house prices, rent levels, access to finance and key drivers of the local and national economy,

- should inform the choice of scenarios run in the HNDA Tool.

Contents

2.5   This chapter includes an analysis of demographic, affordability and wider economic trends which are key drivers of local housing markets. Their analysis helps authorities to understand local housing market dynamics and make evidence-based choices for which scenarios to run in the HNDA Tool. Authorities may wish to use economic forecasting or econometric work to underpin this section.

Data Sources

2.6   Some data sources and other notes for this chapter are set out below.

Table 3

Demographic Trends	Key Data Source and Notes
1(a) **Household composition** **> size** **> age** **> type**	National Data • National Records of Scotland (NRS) • This should can also be used to inform Chapter 3 on housing stock
1(b) **Households Projections** **> principle** **> variant**	National Data • National Records of Scotland (NRS) • (Included in HNDA Tool for calculation)
1(c) **Net Migration**	National Data • National Records of Scotland (NRS) • This is included in the household projections but should be analysed in the HNDA as well to profile net migration in each authority.
Affordability	Key Data Source(s)

Trends	
2(a) **House prices** **> lower quartile** **> median**	**National Data** • HNDA Datapack (given to authorities yearly) (Included in Tool for calculation)
2(b) **Volume of sales**	**National Data** • Register of Scotland Property Statistics
2(c) **House Purchase Affordability Ratios** **> lower quartile** **> median**	**National Data** • HNDA Datapack (given to authorities yearly)
3(a) **Private Rents**	**National Data** • SG Local Housing Allowance rates • SG Private Sector Rent Statistics (Above included in Tool for calculation) • ONS Index of Private Rental Prices
3(b) **Social Rents**	• Housing Revenue Account (LA social rents) • Scottish Housing Regulator (RSL social rents) • SG Housing Statistics (LA & RSL historic rents) **Local Data** • Letting or Estate Agent market intelligence Local Authority PRS data collections
3(c) **Social Rent & Private Rent Affordability Ratios**	**National Data** • HNDA Datapack (given to authorities yearly)
4. **Income** (Used in Tool)	**National Data** • Scottish Government Local Level Income Estimates (Included in HNDA Tool calculation)
5(a) **Loan-to-Value**	**National Data**

mortgage rates	• Scottish Housing Market Review (quarterly)	
5(b) **Number of First-Time-Buyers**		
5(c) **Interest Rates**		
Economic Trends	Key Data Source(s)	
6(a) **Economic Growth (GVA)**	**National Data** • Scottish Annual Business Statistics	
6(b) **Unemployment**		
6(c) **Employment**	**National Data** ▪ SG Labour Market Statistics	

Method

2.7 The following steps are suggested:

Step 1 - decide what evidence is required for the HNDA Tool, LHS and Development Plan and what geography is required

Step 2 - gather evidence and triangulate any local data with national data for quality assurance

Step 3 - tabulate or chart the data and describe the trends i.e. increase, decrease, no change

Step 4 - consider what impact that local demographic, affordability and economic trends may have on the future level of housing need and demand e.g. drive less private demand, drive more affordable need, drive growth of the Private Rented Sector

Step 5 - use the analysis to choose scenarios in the HNDA Tool and write up these decision in this chapter

Step 6 - consider what the findings in this chapter mean for LHS and Development Plan and complete the key issues table (see below)

Step 7 - agree the draft chapter with the HMP.

HOUSING MARKET DRIVERS - Key Issues Table

LHS & Development Plan	Key Issues Identified in the HNDA
Demographic issues for the local housing market(s)	1. 2. 3.
Affordability issues for the local housing market(s)	1. 2. 3.
Economic issues for the local housing market (s)	1. 2. 3.

Outputs

2.7 Authorities will have a clear, evidence-based understanding of:

- **key demographic factors and how these are driving the local housing market(s)**

- **key affordability factors and how these are driving the local housing market(s)**

- **key economic factors and how these are driving the local housing market(s)**

- **the data that are being used to run the HNDA Tool**

- **the key findings that may be used to inform the Development Plan and LHS and completed the key issues table (as above)**

2.8 The HMP will have agreed the draft chapter, which will have met the criteria for <u>Core Output One</u>.

CHAPTER 3: Housing Stock Profile, Pressures (and existing need) and Management Issues

SECTION 1 – INTRODUCTION

Chapter Aim

3.1 To profile the local housing stock and identifying stock pressures e.g. hard to let properties, stock in high demand. To identify those in existing need whose housing need can be met using an in-situ stock solution.

3.2 With the exception of adapted housing (which is evidenced in Chapter 5 on Specialist Provision) this chapter should detail housing issues faced by existing tenants which would be addressed by managing the existing stock i.e. transfers, improving house condition, reducing overcrowding.

3.3 **Note that if any of these issues would require an additional unit of housing, and could not be addressed with an in-situ solution, this should be included in the existing need section of the Tool.**

3.4 To show how this section of the HNDA evidence-base should be used to inform the LHS and the LDP.

3.5 To help authorities, and other housing providers, best meet the need for housing in their area through management/use of existing stock.

Core Output 4

3.6 For robust and credible status HNDAs must satisfy all core outputs and processes, including Core Output 4:

Housing stock profile, pressures and management issues:

- Consider what existing stock is available to meet local housing needs and identify any under-supply or surplus of housing types.

- Show where existing housing stock is pressured and could be managed differently to meet the housing needs.

- Describe the types and number of in-situ solutions used.

- Stock should be considered by size, type, condition, occupancy (overcrowding and under-occupancy), concealed households and turnover (re-lets and voids), tenure and location.

SECTION 2 – CONTENTS (What should be included?)

Contents

3.7 This chapter should profile the existing stock, stock pressures and in-situ/ management issues used/ applied for the following items:

Physical characteristics
- **size**
- **type[2]**
- **condition**
  (quality)

⎫ **by location (all tenures)**

Stock Pressures
- **occupancy**
  (over-crowding)
- **concealed households**
- **turnover**
  (relets & voids)

⎫ **by location (social sector only)**

Stock Management
- **in-situ/ management**
  solutions used/applied

⎫ **by location (social sector only)**

3.8 The above should be considered at the level geography required to inform the LHS or Development Plan. Care should be taken to keep the length of this chapter to the minimum required. **Fuel poverty and energy efficiency should be evidenced in the LHS not the HNDA**.

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[2] For example, detached, semi-detached, flats etc.

Method

3.9 The following steps are suggested:

Step 1 - decide what evidence is required for the LHS and Development Plan and what geography is required

Step 2 - identify data sources (see below) and triangulate any local data with national data for quality assurance

Step 3 - tabulate or chart the data and describe any trends i.e. increase, decrease, no change

Step 4 - use the information from step 3 to identify stock pressures e.g. by size, type, tenure and location of dwelling

Step 5 – use the information from step 3 to identify existing need that needs to be addressed by providing additional units (and which will be inputted into the HNDA Tool)

Step 6 – consider what the future demographic profile of the area (using evidence from chapter 2) may mean for the profile of future stock

Step 7 - consider what the findings in this chapter might mean for LHS and Development Plan and complete the key issues table below

Step 7 - agree the draft chapter with the HMP

SECTION 3 – EVIDENCE & ANALYSIS (What kind of evidence should be used?)

Data Sources

Table 7

Physical Stock Characteristics	Key Data Source(s)
1. **Dwelling Size**	**National Data** • SHCS *(All tenures)* • 2011 Census *(All tenures)* **Local Data** • Local stock surveys • Housing management systems
2. **Dwelling Type**	**National Data** • SG Housing Statistics *(LA only)* • Scottish Housing Regulator Charter *(RSL only)* • SHCS *(All tenures)* • 2011 Census *(All tenures)* **Local Data** • Local stock surveys • Housing management systems
3. **Housing Tenure**	**National Data** • Scottish Household Survey *(All tenures)* • 2011 Census *(All tenures)* • SG Housing Statistics *(All tenures)* **Local Data** • Local stock surveys
4. **Dwelling Condition** (SHQS & BTS)	**National Data** • SHCS *(All tenures)* • Scottish Housing Regulator Charter *(RSL only)* **Local Data** • Local house condition surveys • Housing management systems NB: Of the various factors that comprise SHQS, the most problematic elements **only** should be considered i.e. some definitions of disrepair relate

	to elements that can be repaired such as damp, broken windows, missing tiles and do not therefore require a new unit of housing.
Stock Pressures	Key Data Source(s)
5. **Occupancy** (under-occupancy) (over-crowding)	**National Data** • CHMA LA Overcrowding Analysis **Local Data** • Housing lists/ housing registers
6. **Concealed Households**	**National Data** • CHMA LA Overcrowding Analysis • 2011 Census **Local Data** • Housing lists/ housing registers
7. **Stock Turnover** (re-lets) (voids)	**National Data** • SG Housing Statistics *(LA only)* • Scottish Housing Regulator Charter *(RSL only)* **Local Data** • Housing management systems • Waiting lists/ housing registers
Stock management	Key Data Source(s)
8. **In-situ Solutions e.g. transfers, adaptations, stock improvements or housing management solutions**	**National Data** • Scottish Household Survey **Local Data** • Housing administrative data

LHS & Development Plan	Key Issues Identified in the HNDA
Housing (condition) quality	1. 2. 3.
Housing stock pressures	1. 2. 3.
Size, type, tenure and location of future social housing supply	1. 2. 3.
Sustaining communities e.g. using tenure diversification/ regeneration	1. 2. 3.

Outputs

3.12 At the end of this process authorities will have:

- **profiled the local housing stock by size, type, tenure, condition, occupancy, turnover and location**

- **identified which/ where stock is pressured (under-supplied) and which/where stock is in low demand**

- **identified opportunities to manage existing stock differently to meet identified housing need using the key issues table above**

- **suggested what kinds of new social stock (type, size, location) could be provided to reduce pressure and meet housing need using the key issues table above.**

- **met the criteria of <u>Core Output 4</u>**

- **feedback from the HMP to inform this chapter.**

CHAPTER 4 – Estimating Future Housing Need and Demand

SECTION 1: INTRODUCTION

Chapter Aim

4.1 To meet Core Output 2: "Estimate of future additional housing units".

4.2 Broken into four tenures based on household's likely ability to afford:
(a) owner occupation
(b) private sector
(c) below market rent[3]
(d) social rent.

4.3 To vary the above using to produce a **range of demographic, economic and housing market scenarios.**

Core Output

4.4 For robust and credible status HNDAs must satisfy all core outputs and processes, including core output two:

Estimate a RANGE of additional future housing units:

- Broken down into the number of households who are likely to afford owner occupation, private rent, below market rent, social rent.

- Estimates reported for each five year period of the projection and the cumulative total at the end of the projection (these are output automatically from the Tool.

- The projection period and geography chosen should fit with those required for the LHS and Development Plan.

- Assumptions and choices made about scenarios (demographic, existing need, house price, income and affordability) used in the Tool must be based on evidence and clear explained in the HNDA.

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[3] Sometimes referred to as 'Intermediate Rent' or 'Mid-Market Rent'.

4.5 This chapter uses the demographic and housing affordability evidence in chapter 2 to estimate of future number of additional housing units required to meet housing need/ demand. This **combines an estimate of existing need and future additional households to produce a total additional housing estimate**.

4.6 This chapter does not concern itself with existing need issues that can be dealt with using in-situ/ housing management solutions. These issues are dealt with in Chapter 3 on stock profile and Chapter 5 on Specialist Provision. This chapter does not deal with future changes in stock e.g. planned demolitions, planned new build, projected RTB, projected vacancies which **MUST be considered as part of the HST**.

4.7 The estimate of future additional housing units **is purely an arithmetic estimate** based mainly on assumptions about future household formation, income, house and rent prices. **This does not equate to the future amount that will realistically be delivered on the ground. This is determined in the HST.**

Process

4.8 The HNDA Tool has been developed to facilitate the process described in this chapter with the minimum possible resource. There is no requirement to use the Tool, this is at the discretion of local and planning authorities. As part of core processes 3 and 4, for robust and credible status, this chapter **must** document the process used.

4.9 If the HNDA Tool is used then the HNDA must still, for the benefit of stakeholders, explain the process followed. In addition, the inputs to the Tool (the choices made within it), and the reasons for their selection, must be provided in order that results could be replicated.

4.10 In all cases the HNDA must document and explain the assumptions made and should produce a range of scenarios under different assumptions. The way in which the Tool works is also detailed as a schematic.

Contents

4.11 This chapter should detail the following:

- evidence of choice of future demographic and housing affordability scenarios

- the total future estimate of additional housing units broken down into households likely ability to afford a) owner occupation b) private rent c) below market rent or d) social rent.

N.B. Whilst below market rent does refer to the need for some form of subsidized private rent, it may also be viewed as an potential indicator of demand for alternative shared equity products that are used to support home ownership. As such, the HNDA results may suggest that Authorities should potentially consider further analysis on this.

Method

4.12 The following steps are suggested and should be informed by the evidence in Chapter 2 on key housing market drivers and should be agreed with the HMP:

Step 1 - choose a range of future demographic scenarios that best reflect what may occur in local HMAs

Step 2 - estimate the number of households in existing need that will require a new home and decide how many years it will take to clear/ address this housing need

Step 3 - choose a range of scenarios which best reflect what may happen to future local house prices[4], rent prices and incomes

Step 4 - use affordability assumptions to split total additional housing units by tenure i.e. likely to afford to owner occupation, private rent, below market rent or social housing

Step 5 - consider how the Tool estimates will inform housing policy (LHS) and planning decisions (Development Plan) in the key issues table.

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[4]New build and re-sales.

SECTION 3: EVIDENCE & ANALYSIS

4.13 The purpose of this chapter is to produce estimates of future additional housing units by tenure. A **range of estimates** (for example high, medium and low) should be produced based on different demographic, economic or affordability scenarios. A preferred/most likely scenario could be indicated.

4.14 The Tool outputs estimates year-by-year, at time intervals and cumulative totals at the end of the projection period. Further guidance on using the HNDA Tool as described below is set out in the [HNDA Tool Instructions](#).

Step 1 - Choice of future demographic scenarios

4.15 In this step, the choice of future demographic scenarios should be made and explained. The CHMA strongly recommends the use of the National Records of Scotland (NRS) household projections as these are the official source, are robust and the production of in-house projections is very resource intensive. However authorities are free to use their own estimates. If the NRS household projections are used then the HNDA should discuss and justify the choice of projection used i.e. (principal, high or low. The HNDA Tool contains the NRS principal and variant projections and has the ability to vary them if required.

4.16 If the NRS household projections are adjusted, or customized household projections are used, then there must be justification of the reasoning for this and a comprehensive discussion of the methodology used.

Step 2 - Estimate of existing need for additional housing units and the period in which it will be cleared/ addressed

4.18 In this step an estimate of the existing need for additional housing units should be made. **This estimate MUST represent the need for additional homes and NOT detail in-situ or stock management issues which are addressed separately in Chapters 3 and 5 of the HNDA.**

4.19 The HNDA Tool contains measure of existing need which includes a count of homelessness households in temporary accommodation and households that are *both* overcrowded *and* concealed (HoTOC) These households are deemed to be in need of a new unit of housing. If authorities may use their own estimate and may input these into the Tool. This choice needs to be explained in the HNDA. The Tool is set to clear existing need in **5** years but this can be changed.

4.20 Consideration should be given as to whether the estimates of existing need are solely about social housing or whether they extend to private/ market housing. If it is all tenure then the estimates should be processed

through the **Tool's affordability model** (Step 4) built which splits the additional need across all four tenures.

Step 3 - Choice of future house price and income scenarios

4.21 Authorities should next decide on assumptions for growth in house prices and household income. These assumptions are projected forward for the planning period and the HNDA Tool does this. Past trends are often a good predictor of future trends.

4.22 It is recommended that a number of scenarios are chosen based around a central case which is considered "most likely". Scenarios should be fully considered by the HMP and be determined by the analysis undertaken in Chapter 2 and appropriately informed by consultation. This should be written-up in the HNDA.

4.23 Scenarios are provided within the HNDA Tool. The tool has been set with default scenarios but these can be altered by users to better reflect local circumstances or users may enter their own scenarios.

Step 4 – Use of affordability assumptions to split total additional housing by tenure

4.24 In this stage the total additional housing estimate is split into households likely to afford owner occupation, private rent, below market rent or social rent. The Tool is set up to do this.

4.25 The first assumption made about affordability is that a house is affordable to purchase if it's price does not exceed 3.6 times a household's income. The Tool focuses on lower quartile priced properties and lower quartile incomes because, it's assumed, that this point in the price-income distribution 3.6 times represents First-Time-Buyers (rather than movers) who are in most housing need.

4.26 The use of a 3.6 times income multiple to house price is broadly equivalent to a 3.1x mortgage with a 25% deposit. Practitioners may wish to vary this assumption.

4.27 The next step is to make an assumption about the proportion who are able to purchase who actually go on to do so. This relates (assumes) a **wealth affordability constraint**. The CHMA suggest a starting point of 60% of households i.e. of those households who could afford to buy based on income only 60% actually have enough deposit to do so. This can varied to reflect local circumstances.

4.28 Next, households who rent are divided between those who are likely to afford private rent, below market rent or social rent. The CHMA suggests the following approach and parameters as a starting point:

- if households are spending less than 25% of income on rent – can afford private rent

- if households are spending between 25% and 35% of income on rent – may benefit from some form of subsidized market rent (called below market rent in the Tool

- if households are spending more than 35% of income on rents (that is rents at the 30th percentile of market rents) (including Housing Benefit/ Housing Element of Universal Credit) – may benefit from social rent

4.29 The key findings summary template should now be completed using these estimates and included at the start of the HNDA report.

Table 5

Data Inputs	Key Data Source(s)
1. **Existing Need – Default in Tool** **> Homelessness** **> Concealed AND overcrowded households**	**National Data** • A count of homeless households in temporary accommodation. Scottish Government Housing Statistics (built into the Tool) • Based on Scottish Household Survey estimates and the 2011 Census. (built into the Tool)

2. **Existing Need – Own Estimates[5]**
 	
> Homeless households
 	
> Homeless households in temporary accommodation
	National Data
	    • Scottish Government Homelessness Statistics (based on HLN1)
	
	Local Data
	    • Housing Register
	
	National Data
	    • Scottish Government Homelessness Statistics (based on HLN2)
	
	Local Data
	    • Housing Register
	    • Housing Administration Data

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[5] This should exclude any existing need that can be met with an in-situ solution, for example, housing support or needs that could be met by providing an adaptation, a carer or home help, dampness or condensation that could be resolved by improving the property. These types of issue should instead be considered in Chapters 3 and 5 of the HNDA.

> Concealed households	**National Data** • Scottish Household Survey • 2011 Census **Local Data** • Local Household Survey
> Overcrowded households	**National Data** • Scottish Household Survey
> Specialist housing and housing-related services	**National Data** • Scottish Household Survey **Local Data** • Local Household Survey • Housing Register
> Poor quality housing	**National Data** • Scottish House Conditions Survey **Local Data** • Local House Condition Surveys
3. **Household Projections**	**National Data Source** • National Records for Scotland (built into the Tool)
4. **Affordability to Tenure Housing Need:** **House prices**	**National Data Sources** • SG Datapack (based on Register of Scotland house price data) (built into the Tool)
Income	**National Data Sources** • Scottish Government Local Level Income Estimates (built into the Tool)

Private Rent Prices	**Local Data Sources** • CACI (purchased by some authorities) **National Data Sources** • SG Private Sector Rent Statistics (built into the Tool) **Local Data Sources** • Estate and letting agents • Local rent data collections

HOUSING REQUIREMENT: ESTIMATING HOUSING NEED AND DEMAND - Key Issues Table

LHS & Development Plan	Key Issues Identified in the HNDA
Future need for additional housing broken down by household who are likely to be able to afford: • **owner-occupation** • **private rent** • **below market rent** • **social rent**	1. 2. 3. 4. 5. 6. 7.

Outputs

4.47 At the end of this section authorities should have:

- **agreed all scenarios and assumptions feeding into the HNDA Tool with the HMP**

- **an estimate of existing households in need who require additional housing units (i.e. not existing households whose need can be delivered by an in-situ solution)**

- **projected estimates of additional owner-occupied housing required**

- **projected estimates of additional private rented housing required**

- **projected estimates of additional below market rent required**

- **projected estimates of additional social rented housing required**

- **clearly stated the key issues which will inform the HST, LHS and Development Plan and completed the key issues template**

CHAPTER 5: Specialist Provision

SECTION 1 – INTRODUCTION

What is Specialist Provision?

5.1 Specialist Provision refers to three broad categories of need covering six types of housing or housing-related provision (see table 6). These support independent living for as long as possible and help to enable people to live well and with dignity.

Table 6

Category of Housing Need	Type of Housing Provision
Property Needs	1. Accessible and adapted housing 2. Wheelchair housing

	3. Non-permanent housing e.g. for students, migrant workers, asylum seekers, refugees
Care and Support Needs	4. Supported provision e.g. care homes, sheltered housing, hostels and refuges
	5. Care/ support services for independent living
Locational or Land Needs[6]	6. Site provision e.g. sites/ pitches for Gypsy/ Travellers and sites for Travelling Showpeople, city centre locations for student accommodation

5.2 The HNDA should focus on the <u>scale</u> and <u>type</u> of Specialist Provision required rather than on an individual's illness, condition or equality group. For clarification on the features of Accessible Housing, refer to <u>Building Standards</u> 4.1 and 4.2 and <u>Guidance on Housing for Varying Needs</u>.

5.3 Any Specialist Provision which requires an additional unit of housing to be made available can be expressed as proportion of the total additional future additional units as calculated in Chapter 4.

5.4 When undertaking this section of the HNDA, planners and housing practitioners should engage with health and social care planners to share evidence, identify needs and plan for solutions across health, social care and housing. Housing Contribution Statements in Joint Strategic Commissioning Plans will be useful to focus discussion.

Core Output 3

5.5 For robust and credible status HNDAs must satisfy all core outputs and processes, including <u>Core Output 3</u>:

<u>Specialist Provision:</u>

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[6] At SDP and local authority level Gypsy/Traveller issues are a requirement of SPP given cross border issues here. Locational need may also be for non-permanent accommodation e.g. student accommodation in town centres or near the college/university. Other more innovative or aspirational `locational need' may be for certain types of Specialist Provision e.g. properties within close proximity to shops and services or in groups (villages) to allow support services to be managed and delivered more effectively. With the health and social care agenda, this may come more to the fore so that in future there will be more planning collaboration over the provision of nursing/care homes, residential homes etc.

- Identifies the contribution that Specialist Provision plays in enabling people to live well, with dignity and independently for as long as possible.

- Identifies any gap(s)/ shortfall(s) in that provision and the future level and type of provision required.

- Considers evidence regarding property needs, care and support needs and locational/ land needs.

- Undertakes consultation with all appropriate stakeholders who represent the views of those people who this chapter may impact upon and reports on the findings of such consultation.

- Gives due consideration to the provisions of the Equality Act (2010).

Application in the LHS and Development Plan

5.6 Some areas where Specialist Provision may inform the LHS are:

- estimated number of new accessible houses required in future

- estimated number of wheelchair accessible homes required in future

- estimated number of in-situ adaptations required in future

- better use of existing adapted properties

- estimated scale of home care and support services needed in future

- estimated need for future residential/ care home places.

5.7   Some examples of where Specialist Provision should inform Development Plans are:

- amount and site of land allocated for Gypsy/ Traveller sites and pitches

- innovative housing solutions for older people, where strategic planning may be used to provide supported housing for an ageing population

SECTION 2 – CONTENTS
(What should be included?)

Contents

5.8 Some of the people listed below may have similar needs, despite their individual illness, health condition or equality characteristic. The following types of Specialist Provision should be considered and recorded in the templates provided:

- **accessible and adapted housing**
- **wheelchair housing**
- **non-permanent housing[7]**
- **supported provision[8]**
- **care and support services for independent living at home**
- **site provision[9].**

5.9 When evidencing the above, the following, as a minimum, should be considered:

- older people
- disabled people
- people with a mental health condition
- people with a learning disability
- homeless people
- people fleeing/ at risk of domestic abuse
- people requiring non-permanent accommodation e.g. homeless people, students, migrant workers, asylum seekers, refugees, care leavers, ex-offenders
- Armed Forces Communities
- minority ethnic people (including Gypsy/ Travellers)
- Travelling Showpeople.

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[7] Refers to single person accommodation and multiple occupation, for example homeless people, students, migrant workers, asylum seekers and refugees.

[8] Refers to care homes, sheltered housing, hostels and refuges etc.

[9] Refers to pitches, communal facilities, yard storage, suitable access and serviced sites etc. for Gypsy/Travellers and Travelling Showpeople

Method

5.10 A step-by-step approach to evidencing Specialist Provision is set out below. This includes a set of six **Specialist Provision templates** that indicate what information you may wish to consider.

Step 1 - decide what evidence is needed to inform the LHS and Development Plan and at what geography will be required

Step 2 - gather evidence to populate the Specialist Provision Templates

Step 3 - address any evidence gaps e.g. bespoke data or consultation

Step 4 - analyse the data and populate templates

Step 5 - agree the draft templates with the HMP

Step 6 - consult with those people represented in the templates

Step 7 - reflect any stakeholder feedback in the templates and reports on the consultation findings.

Using Evidence

5.12 The term evidence should be regarded in a broad sense in relation to Specialist Provision. This is necessary due to the availability of statistical data.

5.13 Evidence can include statistics, research, policies and strategies – though this should not extend to anecdotal evidence. The Specialist Provision Evidence Finder is grouped under each of these evidence types. Stakeholder feedback or consultation is also a valid source of evidence. Good practice would be viewed as a using a mix of different types of information. It may be necessary to collect further evidence to address any information gaps. With the health and social care agenda in mind Joint Commissioning Plan - Housing Contribution Statements may also be a useful source of evidence. **If there are gaps in the data which will be addressed in future you should list what the gaps are, when they will be addressed and how they will be used to inform housing policy and land use.**

Specialist Provision Templates

5.14 An example template is set out below and the full set of six are at Annex B. These templates should be used to structure the evidence-base and narrative.

Required for HNDAs	1. ACCESSIBLE AND ADAPTED PROVISION
National policies	
Local policies/ strategies	
Property needs (key section)	e.g. low level appliances, stair rails, barriers free, sheltered housing, housing with care
Suitable for	e.g. people with limited mobility and/or dexterity, need for low level care
Evidence (key section)	1) the current type and level of needs and provision 2) any gaps or shortfalls in needs & provision 3) future type and level of needs & provision required
External stakeholder consultation & engagement	Who was consulted with and how was the consultation undertaken? What were the consultation findings?

Data Sources:

Some useful sources of data for this template include: Scottish Households Survey, Scottish House Condition Survey, Care Homes Census, 2011 Census, ISD A to Z Subject Index, Scottish Government: Health and Community Care Theme – Publications and Datasets, Supported Housing Statistics, Scottish Government Shifting the Balance of Care: Evidence Overview.

SPECIALIST PROVISION - Key Issues Table

LHS	Key Issues Identified in the HNDA
Accessible/ adapted housing	1. 2. 3.
Wheelchair housing	1. 2. 3.
Non-permanent housing e.g. for students, migrant workers, homeless people, refugees, asylum seekers	1. 2. 3.
Supported provision e.g. care homes, sheltered housing, hostels and refuges	1. 2. 3.
Care/ support services for independent living e.g. home help, handymen services, Telecare	1. 2. 3.
Site provision e.g. site/ pitches for Gypsy/ Travellers and sites for Travelling Showpeople	1. 2. 3.
Development Plan	**Key Issues Identified in the HNDA**

Strategic planning for Specialist Provision housing	1.
e.g. any additional locational/ spatial considerations	2.

Site provision	1.
e.g. sites/ pitches for Gypsy/ Travellers and Travelling Showpeople	2.

Objective

5.15 At the end of this process you should be able to:

- **refer to a set of completed Specialist Provision templates**

- **provide appropriate evidence of the scale and type of Specialist Provision in the local area**

- **demonstrate a clear understanding of current scale and type of unmet need**

- **demonstrate a clear understanding of the scale and type of need and provision required in future.**

- **identify key issues to inform the LHS and Development Plan**

- **document engagement with external stakeholders**

- **satisfied <u>Core Output 3.</u>**

HNDA Core Criteria for Robust and Credible Status   ANNEX A

Core outputs

1	### Key housing market drivers • Identifies key factors driving the local housing market, including household formation, population and migration, housing affordability including income, house prices, rent levels, access to finance and key drivers of the local and national economy and how these inform the choice of scenarios run in the HNDA Tool.
2	### Estimate a RANGE of additional future housing units: • Figures should be broken down into the number of households who are likely to afford owner occupation, private rent, below market rent, social rent. • Estimates must be reported for each five year period of the projection and the cumulative total at the end of the projection (these are output automatically by the Tool). • The projection period and geography chosen should fit with those required for the LHS and Development Plan. • Assumptions and choices made about scenarios (demographic, existing need, house price, income and affordability) used in the Tool must be based on evidence and clearly explained in the HNDA.
3	### Specialist Provision • Identifies the contribution that Specialist Provision plays in enabling people to live well, with dignity and independently for as long as possible. • Identifies any gap(s)/ shortfall(s) in that provision and the future level and type of provision required. • Considers evidence regarding property needs, care and support needs and locational/ land needs.

	• Undertakes consultation with all appropriate stakeholders who represent the views of those people who this chapter may impact upon and reports on the findings of such consultation. • Gives due consideration to the provisions of the Equality Act (2010).
4	### Housing stock profile, pressures & management issues • Consider what existing stock is available to meet local housing needs and identify any under-supply or surplus of housing types. • Show where existing housing stock is pressured and could be managed differently to meet the housing needs. • Describe the types and number of in-situ solutions used. • Stock should be considered by size, type, condition, occupancy (overcrowding and under-occupancy, concealed households and turnover (re-lets and voids), tenure and location.

Core processes

1	A Housing Market Partnership (HMP) has overseen production of the HNDA and other stakeholders have been appropriately engaged with via consultation. All HMP decisions have been clearly reported in the HNDA.
2	Housing Market Areas have been agreed with the Housing Market Partnership and are considered in the production of all core outputs.
3	The methodology, limitations and quality control mechanisms are given full technical explanation.
4	Assumptions, judgements and scenarios are well reasoned and transparent.
5	Key findings have been summarised, at the start of the HNDA, using the template provided. Figures should be shown for each five year period of the projection and the cumulative total at the end of the projection (this is automatically output by the Tool).
6	HNDAs have been officially signed-off by the Head(s) of Housing and the Head(s) of Planning or the designated senior official, prior to submission to the CHMA. Where Local Authorities have jointly produced an HNDA they all agreed their core outputs. A statement to this effect has been included as part of the official sign-off.

Specialist Provision Templates   ANNEX B

Required for HNDAs	1. ACCESSIBLE AND ADAPTED HOUSING
National policies	
Local policies/strategies	
Property needs (key section)	e.g. low level appliances, stair rails, barriers free, sheltered housing, housing with care
Suitable for	e.g. people with limited mobility and/ or dexterity, need for low level care
Evidence (key section)	1) the current type and level of needs and provision 2) any gaps or shortfalls in needs & provision 3) future type and level of needs & provision required
External stakeholder consultation & engagement	Who was consulted with and how was the consultation undertaken? What were the consultation findings?

Data Sources:

Some useful sources of data for this template include: Scottish House Condition Survey, Scottish Households Survey, Care Homes Census, 2011 Census, ISD A to Z Subject Index, Scottish Government: Health and Community Care Theme – Publications and Datasets, Supported Housing Statistics, Shifting Balance of Care Evidence. , 2011 Census

For more examples of sources for policy, research or statistics see the Specialist Provision Evidence Finder.

Required for HNDAs	2. WHEELCHAIR ACCESSIBLE HOUSING
National policies	
Local policies/ strategies	
Property needs (key section)	e.g. low level appliances, wider door openings, barrier free bathroom/ shower access, outside space with wider entrance and suitable surfaces etc.
Suitable for	Wheelchair users
Evidence (key section)	1) the current type and level of needs and provision 2) any gaps or shortfalls in needs & provision 3) future type and level of needs & provision required
External stakeholder consultation & engagement	Who was consulted with and how was the consultation undertaken? What were the consultation findings?

Data Sources:

Some useful sources of data for this template include: Scottish House Condition Survey, Scottish Households Survey, Supported Housing Statistics, Shifting Balance of Care Evidence. , 2011 Census

For more examples of sources for policy, research or statistics see the Specialist Provision Evidence Finder.

Required for HNDAs	3. NON-PERMANENT HOUSING
National policies	
Local policies/ strategies	
Property needs (key section)	e.g. single person accommodation, multiple occupation, good quality temporary accommodation,
Land needs (key section)	e.g. university/ college campus sites and city centre sites
Suitable for	e.g. students, migrant workers, asylum seekers, refugees, homeless household,
Evidence (key section)	1) the current type and level of needs and provision 2) any gaps or shortfalls in needs & provision 3) future type and level of needs & provision required
External stakeholder consultation & engagement	Who was consulted with and how was the consultation undertaken? What were the consultation findings?

Data Sources:
Some useful sources of data for this template include: Scottish House Condition Survey, Scottish Households Survey, 2011 Census, Scottish Funding Council: Statistics (on request), Higher Education Statistics Agency (on request), DWP NINO Allocations Tabulation Tool, Recent Migration into Scotland: The Evidence Base, Equality Evidence Finder: Housing, Homelessness and Refugee Status, Housing Support Services to Refugees, 2011 Census, Scotland's transition to rapid rehousing (2018)
For more examples of sources for policy, research or statistics see the Specialist Provision Evidence Finder.

Required for HNDAs	4. SUPPORTED PROVISION
National policies	
Local policies/ strategies	
Property needs (key section)	e.g. care home, sheltered housing, hostel, refuge, etc.
Care and support needs (key section)	e.g. key worker, Community Psychiatric Nurse, Nurse, Social Worker, Care Assistant, Warden, third sector and community partner support worker
Suitable for	e.g. older people, homeless households, those fleeing domestic abuse, disabled people
Evidence (key section)	1) the current type and level of needs and provision 2) any gaps or shortfalls in needs & provision 3) future type and level of needs & provision required
External stakeholder consultation & engagement	Who was consulted with and how was the consultation undertaken? What were the consultation findings?

Data Sources:
Some useful sources of data for this template include: Scottish Households Survey, Care Homes Census, ISD A to Z Subject Index, Scottish Government: Health and Community Care Theme – Publications and Datasets, Supported Housing Statistics, Shifting Balance of Care Evidence. , 2011 Census, Scottish Government HL1 Homelessness Return, Scottish Government Health & Community Care Statistics; Scottish Government: Domestic Abuse, Homeless and Housing: An Evidence Review, Scottish Women's Aid: Research, Health and Social Care Data Finder Scotland's transition to rapid rehousing (2018)

For more examples of sources for policy, research or statistics see the Specialist Provision Evidence Finder.

Required for HNDAs	**5. CARE/ SUPPORT for INDEPENDENT LIVING AT HOME**
National policies	
Local policies/ strategies	
Care and support needs (key section)	e.g. telecare, Home Help, Carer, Handyman/ Care & Repair, Social Worker, Community Alarm
Suitable for	e.g. people living at home but needing care/ support to continue to live independently
Evidence (key section)	1) the current type and level of need and provision 2) any gaps or shortfalls in need & provision 3) future type and level of need & provision required
External stakeholder consultation & engagement	**Who was consulted with and how was the consultation undertaken? What were the consultation findings?**

Data Sources:

Some useful sources of data for this template include: Scottish Households Survey, ISD A to Z Subject Index, Scottish Government: Health and Community Care Theme – Publications and Datasets, Shifting Balance of Care Evidence. Scottish Government Health & Community Care Statistics

For more examples of sources for policy, research or statistics see the Specialist Provision Evidence Finder.

Required for HNDAs	6. SITE PROVISION
National policies	
Local policies/strategies	
Land needs	e.g. sites and pitches
Care and support needs	e.g. site manager, etc.
Suitable for	Gypsy/Travellers, Travelling Showpeople
Evidence	1) the current type and level of need and provision 2) any gaps or shortfalls in need & provision 3) future type and level of need & provision required
External stakeholder consultation & engagement	Who was consulted with and how was the consultation undertaken? What were the consultation findings?

Data Sources:

Some useful sources of data for this template include: 2011 Census, Scottish Housing Regulator charter data Gypsy/ Traveller indicators, Scottish Housing Regulator: Gypsy/Traveller housing and service provision documents, EHRC: Local Authorities Progress in Meeting Needs of Gypsy/Travellers, Scottish Government: A Survey of Travellers Views, Scottish Government: Celebrating Scotland's Showpeople, The Scottish Showman's Guild

For more examples of sources for policy, research or statistics see the Specialist Provision Evidence Finder.

LHS/ Development Plan - Key Issues Tables   ANNEX C

LHS & Development Plan	Key Housing Market Drivers - Key Issues Identified in the HNDA
Demographic issues for the local housing market	1. 2. 3.
Affordability issues for the local housing market	1. 2. 3.
Economic issues for the local housing market	1. 2. 3.

LHS & Development Plan	Estimating Need and Demand - Key Issues Identified in the HNDA
Factors to help determine the HST(s), including for: • **owner-occupation** • **private rented** • **below market rent** • **social rented**	1. 2. 3. 4. 5. 6. 7. 8. 9. 10

LHS	Specialist Provision - Key Issues Identified in the HNDA
Accessible and adapted housing	1. 2. 3.
Wheelchair housing	1. 2. 3.
Non-permanent housing e.g. for students, migrant workers, homeless people, refugees, asylum seekers, people fleeing domestic abuse	1. 2. 3.
Supported Provision e.g. care homes, sheltered housing, hostels and refuges	1. 2. 3.
Care/ support services for independent living at home e.g. home help, Handyperson, Telecare	1. 2. 3.
Site provision e.g. sites/ pitches for Gypsy/ Travellers and sites for Travelling Showpeople	1. 2. 3.

Development Plan	Specialist Provision: Key Issues Identified in the HNDA
Strategic planning for housing for Specialist Provision housing e.g. any additional locational/ spatial considerations.	1. 2.
Site provision e.g. sites/ pitches for Gypsy/ Travellers and sites for Travelling Showpeople	1. 2.

LHS & Development Plan	Housing Stock Profile and Pressures - Key Issues Identified in the HNDA
Housing quality	1. 2. 3.
Housing stock pressures	1. 2. 3.
Size, type, tenure and location of future housing	1. 2. 3. 4. 5.
Sustaining communities i.e. using tenure diversification/ regeneration	1. 2. 3.

EXISTING NEED DATA SOURCES   ANNEX D

Data Inputs	Key Data Source(s)
1. **Homelessness and Temporary Accommodation Pressure (HaTAP)** (built into the Tool)	National • Modelled estimates of the rate of social sector new build that would be needed in each Local Authority in order to a) ensure that the proportion of lets to homeless households does not exceed a fixed proportion - say 60 per cent and b) the number of people in temporary accommodation does not increase [10].
2. **Existing Need**[11] (if estimated by authorities): **Homeless Households**	National • Scottish Government Homelessness Statistics (based on HLN1) Local • Housing Register
Household in Insecure/Temporary Accommodation	National • Scottish Government Homelessness Statistics (based on HLN2) Local • Housing Register • Housing Administration Data
Concealed Households **Overcrowded Households**	National • Scottish Household Survey • 2011 Census Local • Local Household Survey National • Scottish Household Survey

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[10] This equates to the rate of new build required to meet need arising from homeless households, and this will be a subset of all those in housing need. It does not calculate any existing need figures but is instead a proxy of what this could be.

[11] This should exclude any existing need that can be met with an in-situ solution, for example, housing support or needs that could be met by providing an adaptation, a carer or home help, dampness or condensation that could be resolved by improving the property. These types of issue should instead be considered in Chapter 5 of the HNDA.

Concealed AND Overcrowded Households	National • [Scottish Household Survey](#)
Poor Quality Housing (BTS & SHQS)	Local • Local Household Survey • Housing Register
Specialist Housing and Housing-related Services	National • [Scottish House Conditions Survey](#) Local • Local House Condition Surveys [See Chapter 5](#)
3. **In-situ Solutions** **Housing Management Responses to Stock Pressures such as such as adaptations, transfers, repairs and maintenance etc.**	National • [Scottish Household Survey](#) Local • Housing administrative data