

Accommodation for single homeless people in London: Supply and Demand

Broadway and RIS

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1. Key findings

Demand: Rough sleepers

- a. Over 2,500 people have slept rough in London in each of the last three years. (4.1)
- b. Over 200 people sleep rough in London every night. (4.3)
- c. Approximately 2,000 verified rough sleepers have accessed temporary or permanent accommodation in London in each of the last three years. (4.6)
- d. In 2003/04 and 2004/05 there were approximately 450 less verified rough sleepers that accessed accommodation than there were people who slept rough. This shortfall had increased to nearly 850 in 2005/06. (4.6)

Supply: Access to temporary accommodation

- e. The number of quick access beds for homeless people has decreased by approximately a fifth over the last six years. (5.1)
- f. The number of longer stay beds has increased by approximately a fifth over the last six years. (5.1)
- g. On any given day in the first quarter of 2006 there was an average of 17 vacancies in quick access projects and rolling shelters posted on the Homeless London website, compared with over 200 people sleeping rough each night. (5.2)
- h. The average number of vacancies posted for quick access projects has decreased by nearly two thirds over the past 5 years from 34 per day in 2001 to 12 per day in 2006. (5.2)
- i. Between 2000 and 2006 there has been a loss of 827 temporary bedspaces for homeless people, with 1704 bedspaces closing and 877 opening. (5.3)
- j. Between 2004 and 2008 the HCIP will result in a loss of 544 temporary bedspaces for homeless people. (This is in addition to the loss of 827 bedspaces noted above.) (5.4)
- k. Referrals into 13 key London hostels for rough sleepers between 2001 and 2006 shows an increase in local authority referrals, a decrease in outreach referrals as a priority route, and a decrease in self-referrals. (5.5)
- l. Between 2001 and 2006 the average length of stay in 13 key London hostels for rough sleepers nearly doubled from just over six months to nearly twelve months. (5.6)

Supply: Access to permanent RSI accommodation

- m. The number of RSI bedspaces has decreased by over 100 from 3,931 in 2002/03 to 3,819 in 2005/06. (6.1)
- n. Due to a reduction in the availability of this permanent accommodation, the number of people joining the waiting list for RSI accommodation each year has nearly halved from 732 in 2002/03 to 380 in 2005/06. (6.2)
- o. Those who do access the Clearing House waiting list are having to wait longer before starting an RSI tenancy. The number of people having to wait over a year before starting a tenancy has more than doubled from 41 in 2002/03 to 86 in 2005/06. (6.3)
- p. The number of tenancy starts per year in RSI accommodation has decreased by nearly 150 (28%) from 526 in 2002/03 to 378 in 2005/06. (6.4)
- q. The length of RSI tenancies is increasing – reducing availability. The number of people ending an RSI tenancy after over four years has increased from 156 in 2002/03 to 218 in 2005/06. (6.5)
- r. The number of new bedspaces being added to the Clearing House pool has halved each year from 88 in 2002/03, and reached 0 in 2005/06. (6.6)

2. Introduction

The lack of affordable accommodation for homeless people and the challenge in meeting housing demand has been well documented. Due to the range of needs that single homeless people have, and the limited affordable housing available, clear strategies of provision are needed if housing demand is to be better met.

To help inform those working to meet the housing needs of single homeless people in London, Broadway and the Resource Information Service (RIS) conducted a short research project. The aim of the study is to consider whether the supply of temporary and permanent accommodation for single homeless people in London, is likely to meet the demand in 2006 and beyond. The study considers the current supply of single homeless accommodation and the extent of the mismatch between supply and demand.

It is intended that this desk research will help to inform current thinking on supply and demand by contributing data relating to:

- The silt up of temporary accommodation
- The lack of permanent move-on accommodation
- The DCLG Hostel Capital Improvement Programme (HCIP). This programme is welcomed due to the planned improvements to the quality of hostels. However with this improvement comes a reduction in bedspaces. It is important to quantify the likely reduction in order to consider the significance and likely impact.
- The picture of provision across London. Due to the devolution of responsibility for homelessness strategies from central to local government, in recent years there has been an emphasis on borough based provision. Whilst it is important to have effective local strategies that meet local need, it is also key that the pan-London view is monitored.

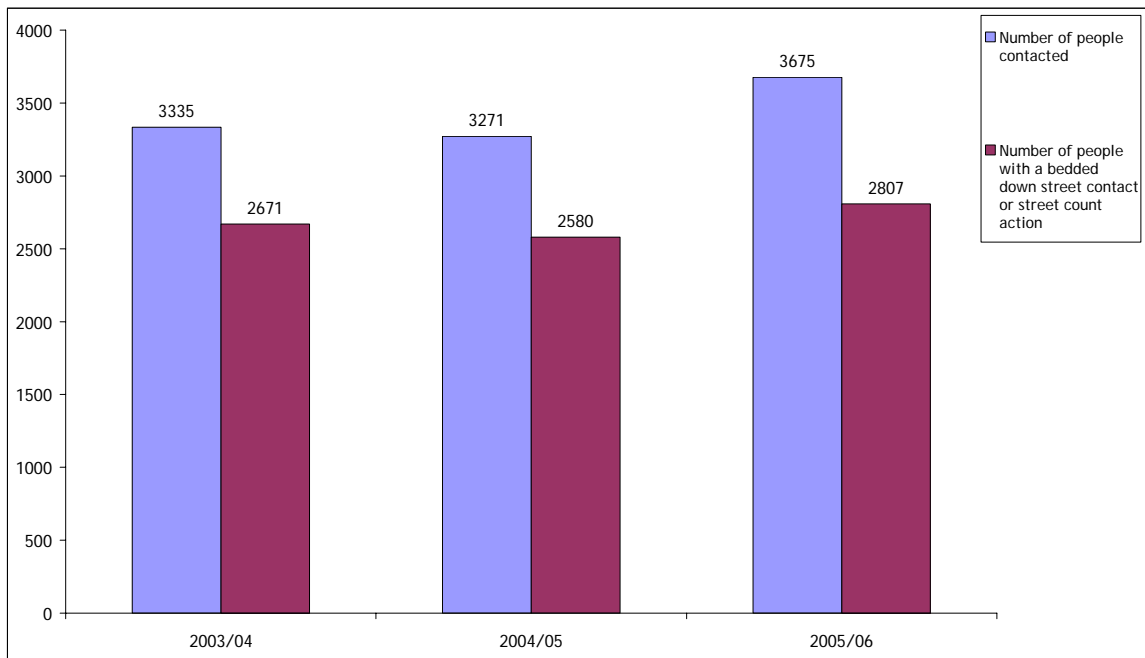
3. Methodology

This was a desk-based research project utilising secondary data. The following sources were used to gather data on the number of temporary and permanent bedspaces available to current or formerly single homeless people in London:

- **London Hostels Directory:** researched and published by RIS, this is the key source of information for finding accommodation in London for homeless people and people who need specialist support.
- **CHAIN:** the Combined Homelessness And Information Network is a website database recording and providing data about the street population in London. It is managed by Broadway, technological development is provided by Resource Information Service, and it is funded by the Department for Communities and Local Government (DCLG).
- **Clearing House:** is a database used to provide and co-ordinate the lettings service for permanent accommodation provided by housing associations under the Rough Sleepers Initiative. It is managed by Broadway and funded by the DCLG.

4. Demand for single homeless accommodation

4.1 Rough sleepers contacted by London outreach teams



[Source: CHAIN]

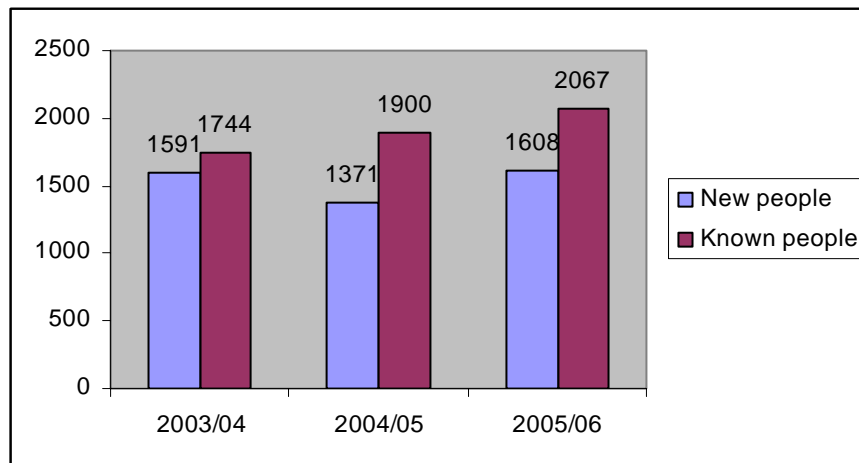
Rough sleepers are a key source of demand for single homeless accommodation. According to CHAIN, the number of verified rough sleepers¹ contacted by outreach or BBS (Building Based Service) teams in London in 2005/06 has increased by 12% from 2004/05 and 10% from 2003/04. These people could have been contacted by these teams on the streets and/or in services such as day centres or hostels. As noted in the Street to Home annual report 2005/06, the increase in rough sleepers contacted could be explained by increased recording² as well as an increase in the number of people on the streets.

The number of people recorded as sleeping rough in 2005/06 has also increased – by 9% from 2004/05 and by 5% from 2003/04. With the number of people sleeping rough in London remaining at over 2,500 for the last three years, there remains a clear need for accommodation for those on the streets. Providing accommodation in central London for all of the rough sleepers that are contacted here is unlikely to always be the best option. Some rough sleepers in central London come from elsewhere and have contacts in other locations, and may be best served with assistance to return or move to these or other areas. In order for supply to better meet demand, the key is having a range of accommodation in a range of locations that rough sleepers want and are able to access.

¹ A verified rough sleeper is someone who has been contacted by an outreach or BBS team whilst bedded down on the streets, and has had a record created for them on CHAIN.

² Since 2003/04 there has been improved, more comprehensive use of CHAIN as a monitoring tool. Those inputting data onto CHAIN have done so more accurately and systematically. In addition, since May 2005 it has been possible to record on CHAIN when a rough sleeper is contacted whilst engaged in street activity such as drinking or begging. Previously the focus was solely on rough sleeping activity. This expansion has led to an increase in recorded contact with rough sleepers on CHAIN.

4.2 New and known rough sleepers



[Source: CHAIN]

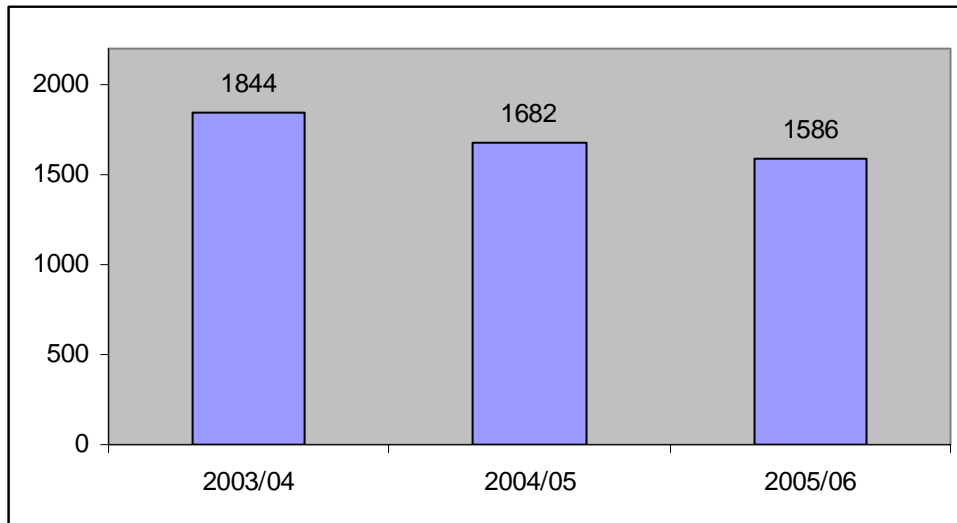
The number of new rough sleepers contacted by outreach and BBS teams is a useful indicator of demand for accommodation. The figures for new people given in graph 4.2 above show that there has been a steady flow of approximately 1,500 new rough sleepers onto London's streets for the last three years. For 2005/06 1,608 new people were worked with on the streets. This transfers to a crude daily rate of four new rough sleepers per day. These people are in addition to the known clients that outreach and BBS teams are already working with. The flow of new people represents a continued added pressure on outreach and BBS teams to find available and suitable accommodation, and on accommodation projects to provide the required bedspaces (see sections 5 and 6).

4.3 London street count results

1998	1999	2000	2001	2002	2003	2004	2005
621	635	546	357	321	267	265	223

The official street count figures for London show a decrease of nearly two thirds since 1998. Despite this notable achievement, the one night snapshot for the last three years indicates that there are still over 200 people sleeping on the streets in London each night. The challenge that this presents becomes clearer as the availability of accommodation for rough sleepers is explored in sections 5 and 6.

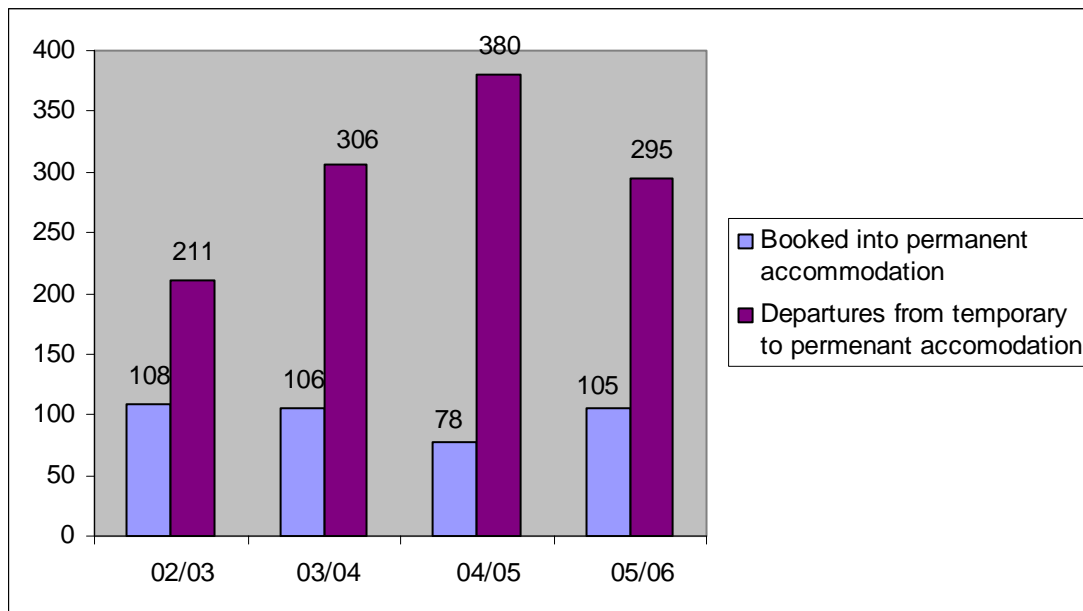
4.4 Rough sleepers accessing temporary accommodation



[Source: CHAIN]

Graph 4.4 shows the number of rough sleepers arriving at temporary accommodation that reports to CHAIN. It indicates that over 1,500 verified rough sleepers are accessing temporary accommodation each year. However, the number of people arriving has decreased by 14% from 2003/04 to 2005/06.

4.5 Rough sleepers accessing permanent accommodation



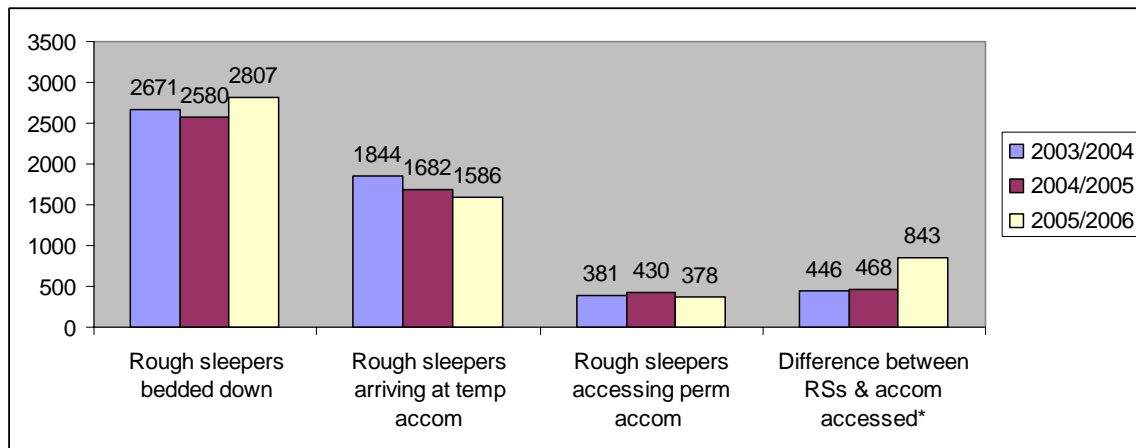
[Source: CHAIN]

Graph 4.5 shows the number of former rough sleepers who have been given access to permanent accommodation, either due to being booked in by an outreach or BBS team, or as a result of leaving temporary accommodation due to a planned move to permanent housing. It is possible that in the same year someone could have been booked into permanent accommodation by an outreach team and have accessed this type of housing on leaving temporary accommodation. In this case the same person would appear in both bars for that year.

As permanent accommodation projects do not report arrivals to CHAIN it is not possible to verify these arrivals, but the above information can be seen as an indication of those accessing this type of housing.

The graph indicates that approximately 400 former rough sleepers have accessed permanent accommodation in each of the last three years. It also shows a decrease in the number from 2004/05 to 2005/06.

4.6 Summary of rough sleepers accessing accommodation



[Source: CHAIN]

* Difference between the number of rough sleepers bedded down in the year and the number of verified rough sleepers arriving at temporary accommodation or having access to permanent accommodation in the year.

The information presented in graph 4.6 above gives a crude summary of the data in this section. The data provides a snapshot of demand in the form of people rough sleeping, and supply in terms of verified rough sleepers accessing accommodation. As the data is a snapshot, the people rough sleeping in a year will not always be the same as those accessing accommodation in a year. Some people who sleep rough one year do not access accommodation until a later year.

Therefore the graph does not show how many of the rough sleepers in a year (in the first three bars) accessed accommodation in that year. It uses the snapshot to take more of an overview, comparing the number of verified rough sleepers sleeping rough in a year with the number of verified rough sleepers accessing accommodation. This provides an indication of the shortfall in supply for the demand that exists.

The graph shows that in each of the last three years over 2,500 people slept rough in London, compared with approximately 2,000 verified rough sleepers accessing accommodation. The difference between these two numbers was approximately 450 in 2003/04 and 2004/05. This had increased to nearly 850 in 2005/06, indicating a significant increase in the shortfall of supply.

5. Supply: temporary accommodation

5.1 Temporary accommodation bedspaces

Year	No. of quick access hostel beds	No. of quick access hostels	No. of longer stay* beds	No. of longer stay schemes
2000	3,000**	50	11,000**	215
2001	2,500**	50	12,000**	200
2002	2,900**	52	12,000**	204
2003	2,700**	45	12,000**	220
2004	2,749	44	13,328	216
2005	2,707	44	13,395	223
2006	2,439	41	13,217	220

[Source: London Hostels Directory³]

* Longer stay beds are those in any temporary accommodation scheme for homeless people that is not a quick access hostel.

** These figures are approximations which is all that is available for these years.

Table 5.1 shows that the number of quick access beds in London for homeless people has decreased by approximately a fifth over the last six years. This links with the decrease in quick access hostels from 50 to 41. In contrast, the number of longer stay beds has increased by approximately a fifth over the last six years.

Quick access beds are particularly important for the street population. They often provide the first step away from the streets. There was a significant reduction of over 250 of these bedspaces between 2005 and 2006.

The increase in longer stay beds in recent years is notable, however there was a decrease in the number of these beds of over 150 between 2005 and 2006. Also by nature, longer stay bedspaces tend to become vacant less often, which means there is a limit to the extent that they can assist in meeting the demand for accommodation.

³ As with CHAIN, the London Hostels Directory does not report on every temporary accommodation bedspace in London. However it provides one useful indication of the volume of accommodation available to rough sleepers.

5.2 Temporary accommodation vacancies

As well as bedspace numbers, another key indicator of accommodation availability is vacancy rates. From Hostels Online and Homeless London data, RIS can report the number of vacancies posted⁴ over a period of time. Statistics on vacancies posted are perhaps most usefully considered as a daily rate. The figures given in table 5.2.1 are for one quarter. The average daily rates are derived by dividing the total number of vacancies posted in a quarter by 90 (days in a quarter). The table gives a snapshot of the average number of vacancies posted per day in the first quarter of 2001, 2004 and 2006 for different types of temporary accommodation for homeless people⁵.

5.2.1 Daily rate of vacancy postings for the 1st quarter (Jan-Mar) 2001, 2004 and 2006 by hostel type and gender

Hostel type	Jan-Mar2001				Jan-Mar 2004				Jan-Mar 2006			
	M*	F**	E***	Total	M	F	E	T	M	F	E	T
Quick access	21	12.5	0.5	34	2.1	5	0.4	7.5	3.6	6.2	2.5	11.8
Rolling shelters	N/A	N/A	N/A	N/A	6.6	0.5	0.6	7.7	4	1.1	0.1	5.2
Foyers	0	1	0	1	0.2	0.2	0	0.4	1.4	1.9	1.5	4.8
Housing Schemes	1.5	5	0.2	6.7	1.3	2.5	0.1	3.9	8.8	20.3	9	38.1
Low support	0.2	6	0	6.2	0.1	5.7	0.1	5.9	0	0.9	0	0.9
Medium support	1.8	1	0	2.8	0.7	2.5	0	3.2	4.7	4.4	7.4	16.5
Supportive	4.4	4	0.8	9.2	2.5	2	1.1	5.6	1.9	3.5	1.7	7.1
Total	28.9	29.5	1.5	59.9	13.5	18.4	2.3	34.2	24.4	38.3	22.2	84.4

[Source: Hostels Online (2001 and 2004) Homeless London (2006)]

* Male ** Female *** Either

⁴ The number of vacancies posted is not the number of vacancies. If the same vacancy is available on two days in a period it would be counted twice.

⁵ For definitions of the types of temporary accommodation see Appendix 1.

Table 5.2.2 presents the totals from the last graph as a percentage of all vacancies posted on a given day in the quarter.

5.2.2 Daily rate of vacancy postings for the 1st quarter (Jan-Mar) of the year – totals

Hostel type	Jan-Mar 2001		Jan-Mar 2004		Jan-Mar 2006	
	Total	%	Total	%	Total	%
Quick access	34	57%	7.5	22%	11.8	14%
Rolling shelters	N/A	N/A	7.7	23%	5.2	6%
Foyers	1	2%	0.4	1%	4.8	6%
Housing Schemes	6.7	11%	3.9	12%	38.1	45%
Low support	6.2	10%	5.9	17%	0.9	1%
Medium support	2.8	5%	3.2	9%	16.5	20%
Supportive	9.2	15%	5.6	16%	7.1	8%
Total	59.9	100%	34.2	100%	84.4	100%

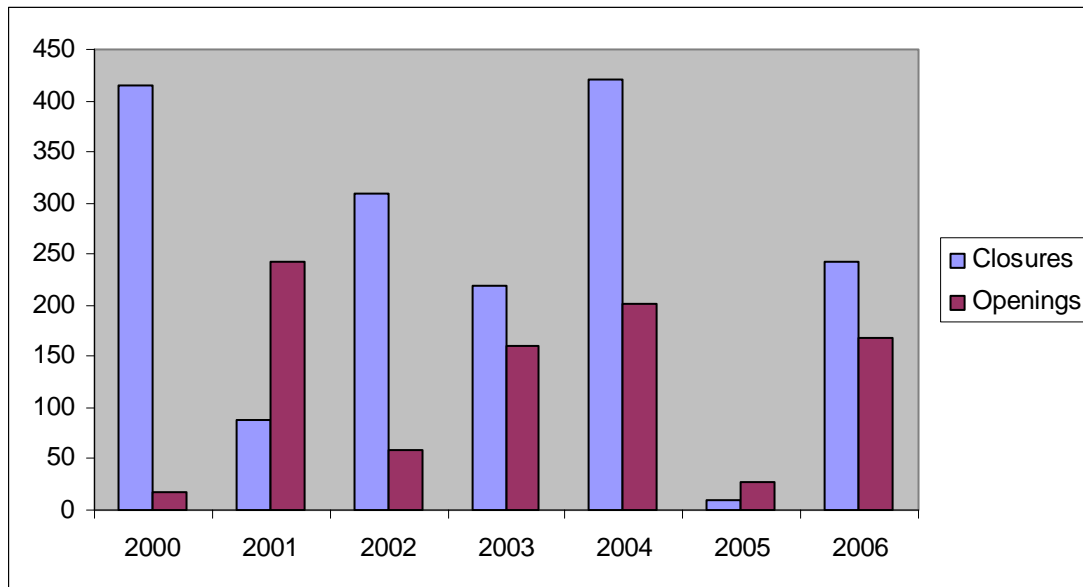
[Source: Hostels Online (2001 and 2004) Homeless London (2006)]

All quick access projects and rolling shelters post their vacancies on Homeless London and have previously done so on Hostels Online, so we can see these vacancy postings as a reasonably accurate estimate of bedspace availability. However, a comparatively low percentage of projects in the other categories of accommodation shown in the table post vacancies on Homeless London. This means that accurately estimating the daily rate of vacancies for those types of projects is hard and the figures shown here should be used with caution. The figures may be indicators of wider issues, such as the availability of low support accommodation, but more investigation is necessary.

Looking therefore at daily vacancy posting rates for quick access and rolling shelters only, we can see that taken together the daily rate of quick access and rolling shelter vacancies in the first quarter of 2006 (17 per day) is significantly less than in 2001 (34 per day) though slightly up on 2004 (15.2 per day).

While quick access and rolling shelter projects are not the only ones that will accept rough sleepers, nevertheless they form the backbone of first stage accommodation and the first port of call for most agencies wishing to make referrals and individuals trying to find accommodation. It is therefore interesting to compare these daily vacancy posting rates in 2006 (around 17 vacancies a day) with current estimates of rough sleeping given in section 4 which indicated that street count figures show that over 200 people per night are sleeping on the streets of London.

5.3 Changes in hostel bedspaces due to projects closing and opening (non-HCIP)



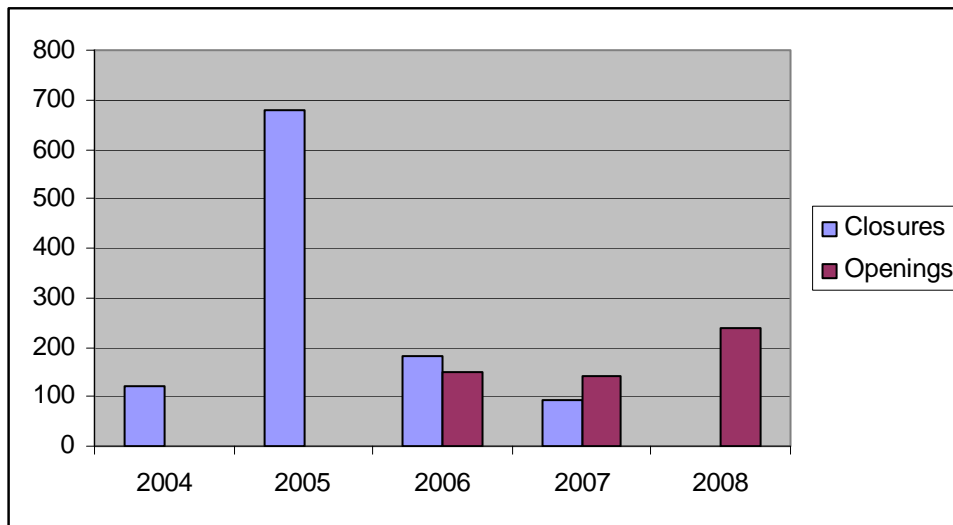
	2000	2001	2002	2003	2004	2005	2006	Total
Closures	414	89	309	219	420	10	243	1704
Openings	18	243	58	160	202	28	168	877

[Source: London Hostels Directory]

Graph 5.3 presents the bedspace changes reported to RIS for the London Hostels Directory. It excludes any changes resulting from the HCIP as these are reported in 5.4. The graph shows that the number of bedspaces closing has been higher than the number opening in most years 2000-2006, with the exceptions of 2001 and 2005.

The table shows that between 2000 and 2006 there has been a loss of 827 bedspaces, with 1704 bedspaces closing, and 877 opening. (For a full list of bedspaces closing and opening by project, please see appendices 2 and 3.)

5.4 Changes in hostel bedspaces due to Hostels Capital Improvement Programme



	2004	2005	2006	2007	2008	Total
Closures	122	680	180	92	0	1074
Openings	0	0	148	142	240	530

[Source: Hostels Capital Improvement Programme]

As noted in the introduction to this report, the DCLG's Hostel Capital Improvement Programme is welcomed by the homelessness sector as it will improve the quality of a number of hostels across London. However with the increase in quality comes a reduction in the number of bedspaces.

Graph 5.4 provides an indication of how the number of bedspaces will change in London due to the HCIP. The data is based on information that it was possible to gather from the DCLG and providers for this report – the data may be incomplete. For a list of the bedspaces by project covered in this data, please see appendix 4.

The graph shows that in 2004 and 2005 London faced the greatest reduction in bedspaces that it will experience due to the HCIP, with over 800 bedspaces closing and none opening. This picture is beginning to even out a little as in 2007 and 2008 it is expected that more bedspaces will reopen due to the HCIP than will close.

However, the table shows that the overall reduction in bedspaces due to the HCIP by 2008 will be 544. This is in addition to the 827 bedspaces identified in the last section as having been lost between 2000 and 2006.

5.5 Referral routes into hostels

Project	2001				2004				2006			
	O	LA	OA	S	O	LA	OA	S	O	LA	OA	S
Booth House, Salvation Army					P				P			
Aldgate, Look Ahead	P				75%		25%	25%	60%	40%		
Bayswater, Look Ahead	100%				P				P			
Cedar's Road, St Mungo's	P				P				P			
David Barker House, Salvation Army					100%							
Earl's Court, Look Ahead	P				50%	50%			50%	50%		
Edward Alsop Court, Salvation Army	P				P							
Endell Street, St Mungo's	P				P							
Graham House, TRB					P				P			
Great Guildford Street, St Mungo's	P				P							
King George's, ECHG												
Passage House, The Passage	P				P				P			
Victoria, Look Ahead	75%				60%		40%					
Number of projects listing this source of referral	10	1	6	5	13	2	7	5	12	6	6	3

[Source: London Hostels Directory]

Key:

Shaded cells = sources of referral

P = priority source of referral

% = priority source of referral

O = Outreach

LA = Local authority (e.g. HPUs, JHTs, MHTs, Housing Advice Services)

OA = Other agency

S = Self

Table 5.5 indicates how, if at all, referral routes into 13 key London hostels for rough sleepers have changed in recent years. It compares referral routes listed in the London Hostels Directory for these projects in 2001, 2004 and 2006. 11 of the 13 projects are listed in the Directory as quick access, with the exception of Booth House and King George's which are listed as Supportive projects (see appendix 1).

Referral routes are grouped into outreach, local authority, other agency and self, and are indicated by the shaded cells. Priority referral routes are indicated by a 'P' in the shaded cell, or by a percentage if the Directory stated the proportion of referrals that were allocated to a specific referral route.

5.5.1 Outreach referrals

Outreach teams were the most common referral route in each of the three years – with the vast majority (all 13 in 2004) of the 13 projects listing them as a source of referral. However, between 2004 and 2006 there has been a reduction in the priority given to this referral route. In 2004 12 of the 13 projects listed outreach teams as a priority referral route. This had decreased to 7 by 2006.

5.5.2 Local authority referrals

The local authority referral route has expanded. In 2001 only one project - King George's hostel - listed a local authority source as a referral route. By 2006, six of the 13 hostels listed one or more local authority source as a referral route. These included Aldgate hostel (40%) and Earls Court (50%) which listed this as a priority referral route.

5.5.3 Other agency referrals

Other agencies include day centres, other accommodation projects and specialist projects. These sources are rarely listed as a priority referral route. As a group these other sources of referral have had a consistent level of referral into the projects, with approximately half of the 13 projects listing them as a referral route in each of the three years.

5.5.4 Self-referrals

Self-referrals have slightly decreased, with only three of the 13 projects listing this as a referral route in 2006, compared with 5 in 2004 and 2001. As with other agencies, this referral route is rarely listed as a priority.

5.6 Length of stay in hostels

Average length of stay in hostels in months

	2001	2004	2006
Booth House, Salvation Army	N/A	8	8
Aldgate, Look Ahead	10	10	10
Bayswater, Look Ahead	12	18	18
Cedar's Road, St Mungo's	8	8	8
David Barker House, Salvation Army	N/A	N/A	15
Earl's Court, Look Ahead	12	18	18
Edward Alsop Court, Salvation Army	12	12	12
Endell Street, St Mungo's	7.5	7.5	7.5
Graham House, TRB	N/A	15	15
Great Guildford Street, St Mungo's	3	8	10
King George's, ECHG	6	6	9
Passage House, The Passage	N/A	6	4
Victoria, Look Ahead	18	18	18
Average	6.81	10.35	11.73

[Source: London Hostels Directory]

Table 5.6 focuses on the same 13 hostels as in 5.5, and indicates the average length of stay in these projects in months, as stated in the London Hostels Directory. The table shows that between 2001 and 2006 the average length of stay across all 13 projects has nearly doubled from just over six months to nearly twelve months.

When comparing 2001 and 2006, four of the projects reported that their average length of stay had increased by three months or more (Bayswater, Earl's Court, Great Guildford Street, and King George's). Passage House is the only project that has seen its average length of stay decrease. In 2006 Passage House is also the only one of the 13 projects that has an average length of stay of less than six months.

6. Supply: permanent accommodation – Clearing House bedspaces

6.1 Bedspaces – total and void

Year	Number of RSI bedspaces	Number of void bedspaces
2002/03	3931	577
2003/04	3950	535
2004/05	3873	556
2005/06	3819	502

[Source: Clearing House database]

The number of RSI bedspaces has decreased by over 100 since 2002/03. This is due to RSLs letting properties outside of the Clearing House. The Clearing House Team at Broadway regularly audits Clearing House properties and liaises with landlords when bedspaces have been ‘leaked’, but it can take time to reclaim them.

The number of void bedspaces each year has also decreased from 2002/03. There are currently no new properties in the development pipeline – see 6.6. This means that the availability of void bedspaces is totally reliant on relets as people leave existing tenancies.

6.2 Referrals to Clearing House

Year	Number of referrals joining the waiting list
2002/03	732
2003/04	574
2004/05	580
2005/06	380

The Clearing House team maintains the waiting list for RSI bedspaces at approximately 250. (If more people were allowed onto the waiting list the average time it takes someone to be housed would increase.) Table 6.2 shows that the number of people joining the waiting list each year has nearly halved since 2002/03. This indicates that fewer people are ending tenancies so in turn fewer people can join the waiting list. In 2005/06 the waiting list was closed for one quarter as it had become very long.

6.3 Length of wait from referral to tenancy start

Year	up to 3 months	3-6 months	6-9 months	9-12 months	over 12 months
2002/03	201	193	64	27	41
2003/04	138	99	156	67	59
2004/05	122	60	170	65	65
2005/06	68	61	107	56	86

As well as less people being able to join the waiting list for RSI accommodation each year, those who do access the list are having to wait longer before starting a tenancy. In 2002/03, 201 people started an RSI tenancy within three months of joining the waiting list. This had decreased to 68 people in 2005/06. Correspondingly, the number of people having to wait over a year on the list before starting a tenancy has more than doubled from 41 to 86 over the same time period.

6.4 Clearing House tenancy starts

Year	Tenancy starts
2002/03	526
2003/04	519
2004/05	482
2005/06	378

The number of tenancy starts per year in RSI accommodation has decreased by nearly 150 (28%) since 2002/03.

6.5 Length of tenancies ending

Year	6 months or less	6-12 months	1-2 years	2-3 years	3-4 years	4-5 years	Over 5 years
2002/03	24	45	90	80	36	23	133
2003/04	20	43	94	76	36	35	151
2004/05	12	41	75	75	56	41	182
2005/06	20	28	52	46	47	60	158

Another factor adding to the reduction in availability of RSI bedspaces is that the length of tenancies is increasing – which of course links to the decrease in void bedspaces mentioned in 6.1. The number of people ending an RSI tenancy within three years has decreased from 239 in 2002/03 to 146 2005/06. Correspondingly, the number of people ending an RSI tenancy after over four years has increased from 156 to 218 in the same time period. This change in the length of tenancies can be seen as positive for the people housed and the agencies that refer and support them, but decreases availability for those waiting to be housed.

6.6 RSI development pipeline

Year	New RSI bedspaces
2002/03	88
2003/04	41
2004/05	19
2005/06	0

Table 6.6 shows that the number of new bedspaces being added to the Clearing House pool has decreased since 2002/03. Currently there are no new properties in the development pipeline. So as noted in 6.1, the availability of voids is totally reliant on relets within the existing pool of properties.

7. Conclusion

This report provides indications that the current supply of accommodation for single homeless people is not meeting the demand, and that this is likely to continue and possibly worsen in the next few years.

A key indication of demand for single homeless accommodation is the number of people sleeping rough. The report shows that the number of verified rough sleepers contacted by services each year, and the number of people sleeping rough each year is increasing. At the same time the availability of temporary and permanent accommodation is decreasing. More temporary accommodation bedspaces are closing each year than are opening, resulting in a growing accumulation of lost bedspaces. In addition, RSI accommodation which is a key source of move-on for single homeless people, is reducing in terms of bedspaces and rate of availability.

The data in this report is limited to the stated sources of CHAIN, the London Hostels Directory and the Clearing House. However, it provides evidence to emphasise the need for a clear pan-London response to how the accommodation needs of single homeless people in London will be better met in future years.

Appendix 1: Homeless London – accommodation categories

Section	Intro Description
DIRECT/QUICK ACCESS YOUNG PEOPLE	<p>These hostels are for young homeless people who are rough sleepers or are in need of immediate accommodation.</p> <ul style="list-style-type: none"> • no application process or waiting list • immediate vacancies to young people who require a bed “for tonight”.
QUICK ACCESS	<p>These hostels provide accommodation for homeless people who are rough sleepers or in need of immediate accommodation. The majority of them are suitable for people with a range of additional support needs.</p> <ul style="list-style-type: none"> • no application process or waiting list • immediate vacancies to people who require a bed “for tonight”.
LOW SUPPORT	<p>Hostels that offer accommodation and limited support to people who are homeless or in housing need with either no or low additional support needs. Applicants must usually be fully capable of independent living and whilst most hostels offer at least some help with finding move-on accommodation, this is not usually their primary focus. Hostels are usually large and in single buildings.</p>
FOYERS	<p>These schemes provide accommodation and a training and employment programme, usually based on the same site. They are for young people who are homeless or in housing need with no or low support needs. Applicants must be capable of living fairly independently and want to actively pursue employment and training. Most foyers make involvement in the employment and training programme a condition of residence.</p>
HOUSING SCHEMES	<p>These projects offer accommodation in shared houses, flats or bedsits that are geographically dispersed. Applicants must be able to live independently but may have some additional support needs that mean they need assistance to maintain their tenancy. Staff visit residents and the projects have a relatively low staff to resident ratio. Some projects have specialist support staff (e.g. around drug, alcohol or mental health issues) or can assist residents to access external support if required. Most of the accommodation provided is either intended to be permanent or there is a good chance of rehousing into permanent accommodation.</p>
MEDIUM SUPPORT: Young People	<p>Projects in this section provide accommodation for young people in housing need who require additional support prior to moving into independent housing. Staff provide support with developing independent living skills and help with finding permanent accommodation. Many of the hostels classified as Medium Support will also accept, but are not exclusively for, young people.</p>
SUPPORTIVE	<p>These projects provide accommodation, support and 24 hour staff cover. They are suitable for people who have additional support needs who cannot live independently. Applicants must need the level of support offered and projects usually accept people with a range of support needs including alcohol, drug and mental health problems. Some projects may be appropriate for those with enduring mental health problems or challenging behaviour. Support offered may include counselling, life skills training and group work. Projects are usually small hostels or shared houses. Included here are some group houses that offer a supportive communal atmosphere and an indefinite length of stay.</p>
EX-OFFENDERS	<p>These hostels are specifically for ex-offenders. Many require referrals from the Probation Service. The type of accommodation and levels of support vary considerably. Many other projects on Homeless London will also accept ex-offenders or have specific targets or bedspaces allocated for</p>

Section	Intro Description
	ex-offenders. Not included on Homeless London are the 13 LPA (London Probation Area) Approved Premises for those on bail, probation or licence. These only take referrals through the Central Referral Scheme of the London Probation Area. Probation staff wishing to find out further details should contact the Central Referral Scheme on 020 7407 7293.
ALCOHOL AND DRUGS	These hostels and specialist schemes are for people with alcohol problems and/or drug problems. An increasing number now take both people with alcohol problems and people with drug problems, and some accept those with dual diagnosis of substance misuse and mental health problems.
MEDIUM SUPPORT	<p>These projects provide accommodation for people in housing need who require additional support prior to moving into independent housing. People with some support needs around alcohol, drugs or mental may be accepted at some projects.</p> <p>Staff provide assistance in finding permanent accommodation and offer support with developing independent living skills. Projects are not able to offer sufficient support to those with multiple or complex problems.</p>
MENTAL HEALTH: High Support	These projects are for people with mental health problems who require a high level of support. Most of the projects are Registered Care Homes and require a guarantee of placement funding before accepting new residents. The emphasis of support and care is on rehabilitation, and residents are usually offered support in a structured therapeutic programme, often with counselling, group work and psychiatric input. Some projects have staff with specialist medical training.
LEAVING CARE	These hostels and housing schemes are for young people who are in or preparing to leave local authority care. Most require Social Services referrals and local authority funding. Their main aim is to prepare residents for living independently, with the emphasis on enabling them to acquire practical life skills. Many other projects listed on Homeless London also accept care leavers. The leaving care projects listed are intended to be a guide to type of provision only and is not fully comprehensive.
SINGLE PARENTS	These hostels are for young women who are pregnant or who have babies or young children. Most projects require a guarantee of eventual rehousing by the resident's local authority and continuing support from a social worker. The projects listed on Homeless London are intended to be a guide to type of provision only and is not fully comprehensive.
MENTAL HEALTH: Medium Support	These projects provide accommodation for people with mental health problems who have medium or low support needs and some ability to live independently. The support generally focuses on maintaining independent living, and often includes emotional and practical support on issues such as benefits, budgeting, making links with the local community and accessing support from other agencies. Although Homeless London features a significant number of mental health projects, including those that are for people who have been homeless or in housing need, it does not have full coverage of the large number of specialist mental health supported accommodation across London. Rather than being fully comprehensive, the projects listed on Homeless London focuses on mainly (but not exclusively) those projects run by voluntary sector providers that have relatively open access referral procedures. Contact each borough's Social Services Department or Supporting People team for full details of all local specialist mental health projects.
WORKING PEOPLE	These hostels are for working people and some also accept students. A significant proportion will also accept people who are unemployed, although most prefer those actively seeking work.

Appendix 2. New hostels opening 2000-2006 (non-HCIP) based on information in the London Hostels Directory

2000

Hostel name	Bedspaces	Notes
Foyer @ Croydon	18	Foyers
Total	18	

2001

Hostel name	Bedspaces	Notes
Bondway – Graham House	69	Quick access
Safe Start Foyer	24	Foyers
Salvation Army – Booth House	150	Supportive
Total	243	

2002

Hostel name	Bedspaces	Notes
Alcohol Recovery Project – Croydon Hostel	13	Supportive
Salvation Army – David Barker House	45	Quick access
Total	58	

2003

Hostel Name	Bedspaces	Notes
Single Homeless Project – 165 Project	16	Supportive
U-Turn Recovery Project	20	Alcohol and drugs
West London YMCA – Uxbridge	13	Supportive
St Mungo's – Adamson Road	21	Mental health – high support
St Mungo's – Endsleigh Gardens	57	Quick access
St Mungo's – Vartry Road	23	Supportive
Thames Reach Bondway – Stafford House	10	Mental Health – medium support
Total	160	

2004

Hostel name	Bedspaces	Notes
Big House	10	Quick access
Brentwood Foyer	40	Foyers
Broadway – Sixty Five	24	Supportive
St Mungo's – Grange Road	30	Medium support
St Mungo's – Tilling Close	18	Medium support
Woodstock Hostel	13	Medium support – young people
Broadway – 65 Talgarth Road	6	Alcohol and drugs
Broadway – 67 Talgarth Road	6	Ex-offenders
Centrepoint – Buffy House	12	Supportive
Thames Reach Bondway – Clapham Road	11	Mental health
YMCA Croydon – Letts House	15	Quick access – young people
Depaul Trust – Willesden Hostel	17	Medium support – young people
Total	202	

2005

Hostel name	Bedspaces	Notes
YMCA – West London	28	Foyers
Total	28	

2006

Hostel name	Bedspaces	Notes
Waltham Forest Churches Nightshelter	25	Quick access
Salvation Army – Hopetown	119	Quick access
YMCA – Earl's Court	24	Supportive
Total	168	

Appendix 3. Hostel Closures 2000-2006 (non-HCIP) based on information in the London Hostels Directory

2000

Hostel name	Bedspaces	Hostel type
Battersea Bedsit Project	10	Leaving care
Bedford/Shenley Probation Hostel	25	Ex-offender
Centrepoint – King’s Cross Hostel	21	Quick access
Centrepoint – off the Streets Project	12	Quick access
Lambeth Caring Houses Trust	28	Mental health
MIND in Croydon	9	Mental health
Oasis Trust – No. 15	6	Supportive
Refugee Housing – Basle Court	32	Supportive
Salvation Army – Booth House	166	Quick access
Salvation Army – Parkway	80	Medium support
SHAPE – Godfreys Hostel	10	Medium support young people
The Bridge	15	Supportive
Total	414	

2001

Hostel name	Bedspaces	Hostel type
Centrepoint/NSPCC – Refuge	6	Quick access – young people
Deanery Lodge	5	Medium support young people
Hyde – Handen and Devonshire Road	10	Mental health
Nehemiah Project – Safe House	10	Supportive
Opendoor – De Laune Street	12	Medium support
Spitalfields Crypt	17	Alcohol and drugs
St Mungo’s – Adamson Road	29	Mental health – high support
Total	89	

2002

Hostel name	Bedspaces	Hostel type
Blessed Trinity Housing Association	30	Mental health – medium support
Bondway Nightshelter	95	Quick access
Bridge HA – Lennox Road	18	Medium support
Oasis – No 24	8	Low support
Salvation Army – Spa Home	44	Quick access
St Philomena's Hostel	58	Working people
Turning Point – Griffin Project	10	Alcohol and drugs
YMCA Croydon – Hawthorn Centre	12	Leaving care
YMCA Croydon – Winton House	34	Medium support
Total	309	

2003

Hostel name	Bedspaces	Hostel type
Centrepoint – Lambeth	32	Quick access – young people
Changes	7	Leaving care
Cleevedon Project	12	Leaving care
Depaul Trust – Willesden Hostel	14	Supportive – now reopen
Inisfree – St Pancras Way	8	Medium support – young people
Islington MIND	6	Mental health – medium support
Lena Fox House	32	Quick access - young people
Nicholas House Residential Centre	17	Mental health – high support
Patchwork Community HA – Aldgate Project	15	Medium support
Safe Start Foundation Hostel	4	Medium support - young people
Salvation Army – Cambria House	40	Quick access
Shortstop Housing Project	22	Medium support – young people
Youth Support House	10	Single parents
Total	219	

2004

Hostel name	Bedspaces	Hostel type
1 Challoner Street	18	Mental health – medium support
Ames House	25	Working people
Clubland Methodist Hostel	36	Low support
GFS Platform – Townsend House	35	Low support
Richmond Fellowship – Crescent House	14	Alcohol and drugs
Salvation Army – Hopetown	84	Quick access
Shepherd House Project	27	Ex-offenders
Simon Community Nightshelter	16	Quick access
Turning Point – Camberwell Alcohol Project	11	Alcohol and drugs
YMCA – Earl’s Court	22	Quick access
YMCA – West London (Women)	28	Low support
YMCA – Alexandra Club	104	Low support
Total	420	

2005

Hostel name	Bedspaces	Hostel type
Highview House	10	Medium support – young people
Total	10	

2006

Hostel name	Bedspaces	Hostel type
Chaucer	36	Alcohol and drugs
House of St Barnabas	39	Quick access
North Brixton Foyer	8	Foyers
Novas Group – Balls Pond Road	6	Medium support
Oakfield Link	8	Medium support – young people
Paddington Churches – Harlesden Road	6	Medium support
Paddington Churches – Miles House	6	Medium support
St Mungo’s – Southampton Row	35	Quick access
St Vincent’s Hostel	66	Working people
Stepping Stones Trust – Park View	18	Ex-offenders
Turningpoint – HELCIS	10	Alcohol and drugs
YMCA Croydon – Cameron House	5	Medium support
Total	243	

Appendix 4. HCIP bedspace changes

Hostel Closures due to HCIP

2004

Hostel name	Bedspaces	Notes
Depaul Trust – Lord Clyde	26	Quick access – young people
Salvation Army – Riverside House	96	Quick access -
Total	122	

2005

Hostel name	Bedspaces	Notes
Novas Group - Arlington House	399	Not closing completely
Novas Group – Dean Street	86	Not closing completely
St Mungo's – Ennersdale House	117	Not closing completely
St Mungo's – Cromwell Road	78	Quick access
Total	680	

2006

Hostel name	Bedspaces	Notes
Broadway – One Sixty	31	Quick access
St Mungo's Mare Street	139	Quick access – not closing completely
Broadway – 11 Conningham Road	10	Medium support – young people
Total	180	

2007

Hostel name	Bedspaces	Notes
St Mungo's – Endell Street	92	Quick access
Total	92	

Grand Total = 1074

Hostel Openings due to HCIP

2006

Hostel name	Bedspaces	Notes
Salvation Army – Cambria House	48	Not known
St Mungo's – Cromwell Road	60	Quick access
Salvation Army – Riverside House	40	Alcohol and drugs
Total	148	

2007

Hostel Name	Bedspaces	Notes
Depaul Trust – Springfield Gardens	13	Hostel type not yet known
Broadway – One Sixty	31	Quick access
Novas group – Dean Street	40	Quick access
St Mungo's – Ennersdale House	48	Quick access
Broadway – 11 Conningham Road	10	Medium support – young people
Total	142	

2008

Hostel name	Bedspaces	Notes
Novas Group – Arlington House	120	Hostel type not yet known
St Mungo's – Mare Street	60	Quick access
St Mungo's – Endell Street	60	Quick access
Total	240	

Grand total = 530