ORG29

Management Services Policy

Decision-Making Criteria for Information about Almshouse Charity Services – in line with the Social Tenant Access to Information (STAIRs)

1. Purpose

This policy sets out how **Taunton Heritage Trust** will make decisions regarding requests for information about its services and how Residents may appeal those decisions if they are dissatisfied.

The policy aims to ensure fairness, transparency, consistency, and accountability in decision-making, while supporting compliance with the expectations of the Regulator of Social Housing, the Housing Ombudsman, and good governance standards for almshouse charities and registered providers.
This policy applies to all requests for information relating to almshouse charity services, including but not limited to:

- repairs and maintenance
- service charges
- resident safety
- complaints handling
- estate management
- allocations and lettings
- policies and procedures
- resident engagement
- performance information
- governance relating to housing services

2. Scope

This policy applies to: all trustees, staff, and volunteers. It covers decisions relating to:

- whether information can be provided
- the format and timescale for providing information
- whether information is exempt from disclosure
- whether requests are reasonable or vexatious
- requests for review of decisions made

This policy does not replace formal complaints procedures, Subject Access Requests under data protection law, or Freedom of Information obligations where separately applicable.

3. Principles

The almshouse charity will ensure decisions are:

- fair
- consistent
- evidence-based
- timely
- proportionate
- transparent
- resident-focused
- compliant with legal and regulatory obligations

The charity recognises that Residents should have access to clear and accessible information about the services they receive.

4. Decision-Making Criteria

When considering requests for information, the almshouse charity will assess:

4.1 Relevance	Whether the requested information relates to services provided by the almshouse charity.
4.2 Availability	Whether the information exists, is held by the charity, and can reasonably be accessed.
4.3 Confidentiality	Whether disclosure would breach: • personal data protection requirements • confidentiality obligations • safeguarding considerations • employment confidentiality • commercial sensitivity • legal privilege
4.4 Reasonableness	Whether the request is proportionate, reasonable, and not excessively repetitive, abusive, or vexatious.
4.5 Resident Interest	Whether disclosure supports transparency, accountability, and resident understanding of services.
4.6 Legal and Regulatory Duties	Whether disclosure supports compliance with: • consumer standards • transparency, influence and accountability requirements • housing ombudsman complaint handling code • data protection legislation • charity law obligations

5. Decision Making Process

Requests may be made in writing, by email or telephone, or in person. Staff should record all formal requests.

The Trust will assess the request against the criteria in Section 4. Where necessary, legal advice may be sought.

Taunton Heritage Trust will aim to respond **within 30 working days.**

Responses will include:
- the information requested; or
- an explanation of why information cannot be provided; or
- clarification of what can be provided instead; or
- timescales where further work is require

If you consider that we have not published information or responded to your request for information appropriately or you are otherwise dissatisfied with the handling of your request please contact us to request a review. A request for a review should generally be made within 3 months of receipt of the original decision.

We will carry out a review of how we have handled your request (an “internal review”) and aim to respond to your complaint within **30 calendar days of receipt**. It may be necessary in exceptional

circumstances to extend the timeline for a response – if this is necessary, we will let you know at the earliest opportunity. Any extension issued will be reasonable and kept to a minimum.

If you are not happy with our response to your review request, you are able to escalate your complaint directly to the Housing Ombudsman under the terms of the Housing Ombudsman Scheme.

6. Relationship with Complaints Procedure
Where dissatisfaction relates to service delivery rather than information disclosure, the matter may be handled under the Complaints Policy.
Residents will be advised where the complaints route is more appropriate.

7. Record Keeping
The almshouse charity will maintain records of:

- requests received
- decisions made
- reasons for refusal or limitation
- appeals received
- outcomes of reviews
- lessons learned

8. Monitoring and Review
This policy will be reviewed annually or sooner if required due to:

- regulatory changes
- ombudsman guidance
- service improvements
- legal updates

9. Equality and Accessibility
The almshouse charity will make reasonable adjustments to ensure fair access to this process.

Date Approved: 2026

Next Review Date: 2027