

## SHELTERED HOUSING REVIEW

### 1. INTRODUCTION

1.1 On 21 June 2006 a report was presented to the Panel with broad proposals for a review of the Sheltered Housing service. A copy of this report is attached at  
# Appendix 1. It was agreed that a detailed report on the proposals to achieve a quality Sheltered Housing service that meets the needs of residents should be produced following investigation of the issues by a working party comprising tenants, members and officers. Councillors Mrs Cleary and Mrs Robinson were nominated to serve on this group.

1.2 The working party has met and considered the issues and proposals and this report forms a suggested way forward for resolving the current position and providing a future strategy to continue to provide a quality Sheltered Housing service. A full list of the  
# working party members is attached at Appendix 2.

1.3 This report summarises the proposals that have been examined by the working party and investigates the practicality and impact upon the service of each proposal.

1.4 The reasons for the review are clearly identified in Section 3 of the previous report to the Review Panel and can be summarised as twofold:-

- To ensure the Sheltered Housing service meets the needs of current and future residents and the demand for sheltered housing generally; and
- To ensure that the service can be fully funded by the service charge and by the Supporting People subsidy.

### 2. PROPOSALS

2.1 Paragraph 5.6 of the previous report to the Panel identified 8 issues that required further investigation and resolution as part of the review of the Sheltered Housing service. Each of these has been examined by the working party and conclusions have been reached. The following paragraphs set out the extent of the further investigations and the conclusions.

2.2 ***Remove the need for Residential/Non-residential/mobile Scheme Managers and provide the service on an area basis with managers being responsible for a maximum of 50 residents.***

2.3 The issue of Residential Scheme Managers has over the past few years been partly resolved by circumstances. Replacement Scheme Managers are now not appointed as Residential Managers for the simple reason that the vast majority of applicants do not want to be resident in the scheme they manage. The role is more professional and is treated as more of a '9 to 5' role. For this reason, prospective managers prefer to live in

their own accommodation and travel to work in their scheme. This also avoids the issue where some residents consider that because a manager lives on site they are effectively on-call for 24 hours a day. This is not acceptable under modern working practices and current employment law.

- 2.4 As a result of the above position there are now only 9 Residential Managers. These managers receive rent-free accommodation as a direct benefit for being on-call outside normal working hours at their schemes. Non-residential managers (a total of 13FTE) do not receive this benefit. This gives rise to some issues of equality which need to be resolved. To remove the requirement for Residential Managers would require negotiation and discussion with the existing Residential Managers, employee side and the Council. Although potentially difficult, it is seen as a necessary part of the overall review of the Sheltered Housing service to resolve this anomaly where Scheme Managers have different roles and salaries for effectively the same job requirements.
- # 2.5 Attached at Appendix 3 is a list of all existing Sheltered Housing Managers and their current responsibilities (a total of 22 staff – 20.55FTE). It can be seen that a number already are managing around 50 units of accommodation. The proposal, as part of the review, is that all Sheltered Housing Managers should be responsible for 50 units of accommodation and that these will be part of new Area Teams. The Area Team approach will ensure that appropriate cover can be provided as and when necessary. The working party have examined this proposal and seen examples of working rotas that show the numbers of staff required to meet these requirements and the needs of annual leave and sickness. Combined with the proposed reduction in the total number of Sheltered Housing scheme units (see paragraphs 2.8 – 2.10) it has been assessed that a total number of 13 Sheltered Housing Managers would be required to provide a service of the same quality as the existing service. This is some 7.55FTE less than the total of the current establishment of Sheltered Housing Managers. Appendices 4 and 5 are examples of existing Sheltered Housing Manager duties that would also be achievable with the 1:50 ratio.
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- 2.6 To achieve the reduction of staffing mentioned above may require compulsory redundancies. However, this approach would only be used as a last resort and it is hoped that most of the reduction can be achieved by negotiation i.e. early retirements, voluntary redundancy, etc. Nevertheless, a sympathetic approach to these changes would be taken in line with the Council's policies in this respect.
- 2.7 ***Remove from sheltered accommodation status, schemes where the age and type of residents clearly indicate that the nature of the scheme has over the years changed into accommodation more akin to general needs housing, albeit in a protected environment.***
- 2.8 Sheltered Housing is commonly assumed to be housing that is in the main flats that are part of a complex in one confined building. This is true of the majority of sheltered schemes within the New Forest. However, a substantial portion of the existing sheltered accommodation is flats and bungalows that are not attached to the main scheme but are separate buildings. It is believed that many of the residents who live in these schemes would, if given the choice, opt out of the Sheltered Housing service. However, many would like the protection of being linked to a Central Control and to have the security of contact when needed in the case of emergency. In addition, over the years with the

increasing demand for accommodation in the District, many of these units of accommodation have been let to individuals and couples who would not fully meet the criteria for Sheltered Housing. It is a requirement currently that anyone who occupies designated sheltered housing **must** have the Sheltered Housing service. This can give rise to the difficulties mentioned earlier and removes choice from the customer. This is not in line with current Government philosophy where choice is expected to be given around all aspects of housing provision.

- 2.9 # Removing certain types of dwelling from sheltered status would resolve many of the difficulties mentioned above. Appendix 6 lists all the existing sheltered units of accommodation in the District. Those emboldened are those it is recommended should be removed from sheltered status and thus not have the full Warden-Assisted service. Nevertheless all tenants, if they choose to do so, would have the ability to be linked to a Central Control to provide an emergency alarm service. In the short term, any residents who wished to continue with a full Sheltered Housing service would continue to be provided with that service.
- 2.10 The change from sheltered housing status would be implemented over a period of time to allow for full and detailed consultation with residents and staff. This will minimise the impact upon residents and allow a smooth transition to non-sheltered status. It is essential for any resident who wishes to remain in their home and take advantage of the full Sheltered Housing service should be able to do so. The changes suggested above will be implemented in a way to ensure this can be achieved.
- 2.11 ***Work with Hampshire County Council's (HCC) Supporting People Officer to ensure that any service provided meets the needs of our residents and at the same time meets their requirements.***
- 2.12 One of the main drivers for change is the pressure from the Supporting People team to provide services in the most cost effective way. This means maintaining overall standards but gaining efficiencies wherever possible.
- 2.13 The proposals contained within this report have been fully discussed in detail with the HCC representatives and are fully supported in having the ability to provide the level of savings required and yet continue to provide a quality Sheltered Housing service to the residents of the District.
- 2.14 The aim of the review of the service is to be in a position by 1 April 2007 to implement any necessary changes and to achieve the financial savings. However, it is recognised that to achieve major change in a relatively short time may not be fully achievable. Accordingly, this matter has been raised with the HCC Supporting People Team. They have been consulted about the proposals and the timescale for change. They have indicated they would be satisfied if, although all changes had not been implemented by 1 April 2007, a programme for change had been agreed with them in the shortest possible timescale.
- 2.15 ***Consult with HCC Social Services to identify the need for Extra Care housing and to ensure that appropriate provision is allowed for in the process of the review.***

- 2.16 The provision of Extra Care is seen as an opportunity for the District Council to work in partnership with HCC to provide levels of care and support which individuals need. It is also very much in line with Government guidance which is to bring care and support to individuals in their own homes, rather than move them to residential care homes.
- 2.17 The first Extra Care Sheltered Housing scheme was established at the end of 2005 at Barfields in Lymington. Discussions with Social Services have identified that the aim is to provide 3 or 4 other sheltered schemes in strategic locations throughout the District as Extra Care accommodation. The proposals contained within this report make due allowance and provision to meet these aims.
- 2.18 ***Changes to the current standby out-of-hour's service.***
- 2.19 A standby service is currently offered to all residents. This is responding to residents' emergency calls out of normal working hours (i.e. at night and weekends). Whilst this service is not currently costly (£24,000 pa), there are serious issues that threaten the whole viability of the service.
- 2.20 The number of calls each week average around 10, but not all of these could be classified as true emergencies. Each call results in a standby Sheltered Housing Manager having to attend on site.
- 2.21 There are a number of issues that if considered and implemented would add substantially to the costs of providing this service. Firstly, there is the lone worker issue. At the moment, any member of staff providing the standby service might have to respond to an emergency in the middle of the night and might be required to travel some considerable distance across the Forest to reach the resident's home. Secondly, the European Working Time Directive would not allow someone on standby that had been called out at night to resume their normal working day on the following morning if there was a risk that they would exceed the limits of their working hours that week. Thirdly, the trade union, Unison advises that anyone who responds to an emergency before midnight and then does not return home until after midnight should not respond to another call for 8 hours (to enable them to get sufficient rest).
- 2.22 All of the above issues mean that the current system of providing a standby service is not sustainable. The only way to rectify the situation would be to substantially increase resources. Initial indications are that costs of providing the service could rise to over £250,000 pa. This is clearly not acceptable. The reason for the high additional costs quoted is that the standby service would need to be resourced with a "waking shift" of staff.
- 2.23 Research undertaken with other Sheltered Housing providers indicates that many do not now provide a standby service. All do provide a 24-hour monitoring service, as do NFDC, but simply act as a first point of contact in an emergency. Dependant upon the nature of the call, either a call would be made to a family member to provide support or in the case of a real emergency the police, ambulance service or the fire brigade would be called.
- 2.24 ***Investigate opportunities to gain a more cost-effective Central Control service.***

- 2.25 The proposals contained within this report assume a level of savings in the current cost of providing the Central Control service. Members of the Panel will be aware of a separate report on the future of Central Control that was presented to the Panel and Cabinet in June and July 2006. Cabinet agreed in July to investigate the possible outsourcing of the Central Control service and tenders are currently being sought for the service.
- 2.26 It is anticipated that the future of Central Control will be clear by January 2007 and the actual savings achievable identified. This will assist in the overall financial viability of the Sheltered Housing service and will permit the setting of the actual service charge for tenants benefiting from the Sheltered Housing service.
- 2.27 ***Review the management structure and administrative support currently provided for the Sheltered Housing service.***
- 2.28 The Sheltered Housing service is currently managed from offices in a sheltered housing scheme at Winfrid House in Totton. The offices comprise a converted flat. The same building also houses the Council's Central Control, also in a converted flat.
- 2.29 Should the outsourcing proposals for Central Control prove effective then the existing accommodation at Winfrid House currently used could be reinstated as living accommodation. This would provide an additional flat and create rental income for the Housing Revenue Account in the region of £3,000pa.
- 2.30 As part of the restructure of the Housing service at Appletree Court additional office space will be created (due to the Reactive Maintenance service moving to Marsh Lane Depot), which will mean that a transfer of the Sheltered Housing management can take place to Appletree Court. Again this will free up accommodation at Winfrid House and the flat created will provide income of around £3,000 pa. In addition, when located at Appletree Court the Managers can take advantage of the existing Housing Service administrative support at these offices. This will result in savings in current staffing costs in the region of £10,000 pa. Other savings will accrue in terms of telephone charges, heating, ICT etc. As yet these other savings have not been quantified.
- 2.31 ***Ensure the proper allocation of functions and charging for the Sheltered Housing Manager's time between support and general housing duties that can be charged to the HRA.***
- 2.32 Currently the Sheltered Housing Manager's duties are split between providing support to residents (funded by Supporting People) and housing duties (funded by the HRA). When the service was originally started in the mid-80's all the duties of the Sheltered Housing Manager were either support or care functions. Over the intervening years Sheltered Housing Managers have carried out more and more housing functions. When the service was fully funded by the housing benefit regime the issue of the split of functions was not important. However, with the advent of the Supporting People regime it was essential to fund activities from the correct pot of money. Supporting People will fund the support functions of the Sheltered Housing Manager and Housing Benefit still continues to fund a small proportion of the housing charges related to the property (i.e. communal lounge, heating lighting, etc.). The costs of the service, therefore, are met

from these two areas of funding together with that small proportion of tenants who pay their own rent and service charges. Any work carried out by the Sheltered Housing Manager which in any way relates to the tenancy should not be funded from either of the previous two areas, but should be taken from the HRA.

Currently the managers will carry out a number of housing functions ranging from on-site viewings and sign ups, day-to-day tenancy issues and surrender of tenancies, etc. It is calculated that this amounts to around 20% of the total hours worked.

- 2.33 Although complicated, the issue above means that part of the costs of the Sheltered Housing service can justifiably be defrayed to the HRA. This has the effect of reducing the costs of the service that need to be funded by Supporting People. With the reductions and pressures on the Supporting People budget this means that what funding is available can be used to the best effect and ensure the quality of the service can be maintained.

### **3. CONSULTATION**

- 3.1 The working party that has been examining the issues consists of two Sheltered Housing tenants and a member of the Tenants' Consultative Group. These members understand the need for change in the service to meet the financial pressures currently facing the service and support in broad terms, the proposals contained in this report.
- 3.2 Wider consultation is required before the proposals can be fully implemented, both with the tenants of Sheltered Housing and staff involved and affected. Currently, staff are aware of the proposals in broad terms but once specific issues are identified (i.e. closure of some Sheltered Housing) detailed consultation with staff will need to be carried out. There will be a sensitive approach to dealing with the existing staff particularly where the decommissioning of existing sheltered accommodation units is concerned. Wider consultation will also be carried out both with Hampshire County Council Social Services and the Primary Care Trust to ensure that all aspects of the review and its impact are taken account of.
- 3.3 With regard to consulting tenants, the prime aim is to not to worry any elderly residents of our sheltered schemes. The message to be given is not that Sheltered Housing is shutting or closing, but is adapting to meet current needs. More choice will be given to all residents and services will be provided where they are needed and wanted, not as a matter of course. Any resident in an existing Sheltered Housing unit which is to be decommissioned will be guaranteed a level of service and given the opportunity to move within one of our main Sheltered Housing units as soon as is practicable. Detailed consultation will be carried with residents in those schemes and accommodation that are proposed to be decommissioned. It is also necessary to understand that the proposed consultation with tenants is not about whether the review should be carried out and the proposals implemented but regarding the methods and timescales used to fully implement the proposals.

## **4. CONCLUSIONS**

- 4.1 Having examined the proposals the working party have reached the conclusion that, with the requirement to achieve significant savings and to modernise the Council's provision of sheltered housing, the proposals offer the most appropriate means of achieving these necessary savings and at the same time ensure that a quality Sheltered Housing Service is provided to those who require it. At the same time it will enable people to have a choice in terms of the level of service and type of accommodation they require to meet their needs as they grow older.
- 4.2 It is important that any change is introduced in a consultative way to minimise the impact upon tenants and staff and wherever possible this approach will be implemented. However, it must be noted that some individual proposals may need to be implemented more speedily to achieve the necessary savings that will meet the forthcoming reductions in the Supporting People funding.

## **5. FINANCIAL IMPLICATIONS**

- 5.1 The current cost of providing the Sheltered Housing service is £823,160.
- 5.2 The proposals contained within this report will, once fully implemented, reduce the costs of the Sheltered Housing Service by approximately £200,000 per annum.
- 5.3 The savings identified will, in the main, be taken up by the greatly-reduced funding that will be provided by the Supporting People regime, which is expected to be roughly in line with the cost reduction identified in 5.2.
- 5.4 A further impact on the financial situation is likely to result in the future from potential cost reductions due to alternative provision of Central Control. It is not possible to quantify this at this stage and may in any case be balanced by a loss of income due to a reducing number of sheltered housing clients in the future. Members will be updated as progress is made concerning Central Control.
- 5.5 The saving identified in 5.2 is the result of a reduction in the number of wardens from 21 to 13. This is likely to result in substantial redundancy costs in the short term, which can only be quantified as and when details of the staff affected become known. There is, however, no alternative to incurring these one off costs if the Council wants to retain a financially viable Sheltered Housing service and it is proposed that these are charged against the current Housing Revenue Account surplus balance.

## **6. ENVIRONMENTAL IMPLICATIONS**

- 6.1 There are no significant environmental implications as a result of the changes proposed in this report.

## **7. CRIME AND DISORDER IMPLICATIONS**

- 7.1 There are no significant crime and disorder implications as a result of the changes proposed in this report.

## **8. TENANTS COMMENTS**

- 8.1 This report will be discussed at the Tenants' Consultative Group Meeting on 7<sup>th</sup> November and the views of this group will be reported verbally to the Panel.

## **9. EMPLOYEE SIDE COMMENTS**

- 9.1 Employee Side would welcome retaining the current staff levels and work in house with regards to Sheltered Housing and Central Control.

Budgetary control and efficiency savings put Managers in an untenable position. It has been noted from the various meetings, that to avoid the possibility of losing the whole Sheltered Housing scheme and to enable the Council to retain some control, these proposed savings which have been identified would need to be implemented.

A saving of £200K is needed and proposals would be through a reduction of Sheltered Housing Managers from 22 to 13 employees, whilst increasing their responsibility to a ratio of 50 residents – 1 manager and outsourcing the Central Control Team.

- 9.2 Employee Side recommend that any employee put into a redundancy situation should leave on favourable terms. All Sheltered Housing Managers now placed on the 'At Risk' register have no problems undertaking their current duties and employee side would request that their welfare is of prime importance. Personnel put on the 'AT Risk' register may be successful in transferring to other posts within the Council. Voluntary early retirement or redundancy could be a way forward.

Employee Side would recommend that any employee who unfortunately loses their post on a compulsory basis will be satisfied with their remuneration package, even if this impacts on the first years savings.

- 9.3 Central Control staff, through outsourcing, will have the possibility of moving under the terms of TUPE 2006 (Transfer of Undertakings Protection of Employment). Accepting a tender that would mean a relocation being unreasonable could put the employees in a compulsory redundancy situation.
- 9.4 The sheltered housing residents also have a vested interest in the proposed changes, Employee Side would ask whether an in depth consultation has taken place, involving all residents, prepared to pay more for the current service. (Appendix 1, Sheltered Housing Review 3.4)
- 9.5 It cannot be ascertained how the proposals will work until implemented but any problems will need to be addressed when they occur.
- The concern is that NFDC is not to suffer adverse publicity. Council tax charges are high and a reduction in our service level, if seen to be unfair, will lower the high esteem in which the Council is held by our public.
- 9.6 The documentation and consultation over these proposals to employees and employee side have been managed well and any problems of difficulties that arise can be resolved amicably and to everyone's satisfaction.



## **10. PORTFOLIO HOLDER COMMENTS**

- 10.1 I understand the need to make the changes to the existing Sheltered Housing Service to meet current needs and also to ensure the service can be funded. I am satisfied that the changes proposed in this report will meet the needs of the sheltered housing service in the future and also be affordable. I am also pleased that the proposals will enable a quality service to be provided within the remaining sheltered housing accommodation and yet at the same time the decommissioned schemes will provide for much needed additional general needs accommodation. The transition from sheltered housing to more general needs housing will need to be dealt with appropriately and I am satisfied that this will be the case.
- 10.2 It is always disappointing when services are forced to make changes as a direct result of funding difficulties particularly when this results in staff reductions. However, with pressure on all budgets currently we must ensure that services are properly focused to meet essential need. I am satisfied that the proposals contained in this report will ensure that New Forest District Council will continue to provide high quality Sheltered Housing services to those in the greatest need.

## **11. HOUSING HEALTH AND SOCIAL INCLUSION REVIEW PANEL COMMENTS**

- 11.1 "The Panel discussed the proposals regarding the future the Sheltered Housing Service.
- 11.2 The suggested proposals put forward by the Working Group included the move toward an area based service, with managers being responsible for 50 units of accommodation, this would mean however, that there would be a reduction of 8 members of staff.
- 11.3 The decommissioning of schemes would take place only where it was felt that the sheltered accommodation status was inappropriate for the needs of the tenants. It was recognised that many tenants within current schemes would opt out of the scheme preferring more general needs housing instead.
- 11.4 Some members had expressed concerns regarding the implications of the decommissioning of Harvey Gardens in light of the nature of the Howard Oliver House scheme and the effect this might have on the community it formed. Members were reassured that all comments regarding possible decommissioning would be considered carefully in conjunction with the needs and requests of the residents of the individual sheltered housing schemes.
- 11.5 It was also felt by some members that in relation to the proposal of ceasing the out of hours service, the report was insufficient in its detail of how this changed was to be effectively managed. A significant change in service could lead to unnecessary fears of tenants as to the level and quality of service they would receive. Outsourcing of the service would mean that valuable local knowledge and expertise currently embodied in the Council's housing officers would be lost. This service needed to be maintained during the transitional period in order to make reassurances to tenants that their needs would be adequately met.
- 11.6 It was therefore felt that the report should emphasise the continuance of the telephone standby service current offered to tenants, so as to reassure tenants that the changes as a result of the cessation of the out of hours service would be minimised.

11.7 It was therefore agreed that a new paragraph 2.25 (with subsequent re-numbering of the following paragraphs) be added as follows:-

“To ensure a smooth transition to a new service and to ensure the maximum support for tenants the Council will maintain a 24 hour telephone advice line for Central Control to ensure the best possible advice to all tenants for a minimum of 12 months. This service will be provided by professional sheltered housing staff”.

11.8 Some members felt that further reassurance was needed regarding the process of the outsourcing of the Central Control Service. Members were informed that a full and thorough process would be undertaken in the selection of an appropriate provider. Nonetheless, the outsourcing of the service would not take place unless officers were satisfied that the chosen provider was of the appropriate calibre.

**RESOLVED:**

That subject to the inclusion of a new paragraph 2.25 as above and the inclusion of a paragraph emphasising that the Central Control Service would not be outsourced unless a quality provider was found, the Cabinet be recommended to agree the proposals.”

**12. RECOMMENDATION:**

12.1 That the Cabinet be requested to agree the proposed changes to the Sheltered Housing Service as set out in the report and in the comments from the Housing, Health and Social Inclusion Review Panel.

**For further information please contact:**

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**Background papers**

Report to Housing, Health and Social  
Inclusion Panel, June 2006

Minutes of the Sheltered Housing Working  
Party

**HOUSING HEALTH AND SOCIAL INCLUSION REVIEW PANEL – 21 JUNE 2006**

**SHELTERED HOUSING REVIEW**

**1 INTRODUCTION**

- 1.1 This report looks at proposals for the restructuring of the sheltered housing service and identifies possible changes to the service to meet the current requirements.

**2 BACKGROUND**

- 2.1 Sheltered housing can be defined as accommodation offering security and companionship for older / vulnerable adults who require support to enable them to maintain their independence.
- 2.2 The Council has a total of 689 sheltered housing units located in 26 sheltered housing schemes together with a number of “link-ins”. (i.e. Accommodation adjacent to sheltered housing schemes that is linked by assistive technology.)
- 2.3 The current structure for the Council’s sheltered housing service was established in 1989 with 777 units of accommodation and in essence created a stand alone management structure and residential sheltered housing managers allocated to individual sheltered housing schemes throughout the District. A mobile and stand-by service was also provided to give residents support during the resident sheltered housing managers’ absence and outside of normal working hours.
- 2.4 Several changes have taken place since 1988 that have included a reduction in the numbers of support staff and a loss of sheltered housing units following refurbishment of bed-sit accommodation and the closure of Churchill Court.
- 2.5 It was originally envisaged that sheltered housing would be allocated to independent, active older people who would move onto residential care when they could no longer remain living independently. However, with the promotion of supported care and independent living there is now a movement away from residential care. Extra Care housing is seen as a solution to the current situation and an intermediate solution to those who require greater support and care but who do not need the greater levels of care and support offered by residential accommodation.
- 2.6 New Forest DC in partnership with Hampshire CC Social Services has commenced a scheme for extra care provision in Barfields Court, an existing sheltered scheme in Lymington. It is envisaged that this will be a model for meeting the demand for greater support and care for the more frail elderly and it is anticipated that the scheme will develop in time to cover more sheltered housing schemes within the New Forest.

### **3 ISSUES CURRENTLY FACING THE SERVICE**

- 3.1 Sheltered housing has been found in recent years to be less attractive than perhaps it once was. Under the Council's choice based lettings system it is possible to get a good idea of the demand for specific types of property by monitoring the number of applications for each vacancy. Using this data it can be seen that demand for sheltered housing is now lower than for other property types. Vacancies of one bedroom flats for general needs will typically generate between 30 and 60 applications for each vacancy. For flats in sheltered schemes the number of vouchers will typically be around 10 applications. For sheltered bedsits, demand is even lower with often less than 5 applications for each vacancy.
- 3.2 The trend over recent years has been for elderly people to wish to remain in their own homes for as long as possible. Elderly people are less inclined to want to move into sheltered schemes and prefer to receive support within their own home environment. Where housing applicants wish to move because their family home is too large for them to manage, they tend to prefer to consider bungalow accommodation where they can receive support.
- 3.3 The service is currently funded entirely from the service charges that are paid by individual residents. These charges pay for the staffing resources and assistive technology that provides for their support, safety and security. The vast majority of residents (over 80%) receive assistance for their service charges partly or wholly from the government; (via Housing Benefit, but since 2003 from the Supporting People regime.)
- 3.4 Over recent years the cost of providing the service has risen but funding from the government has reduced. Essentially in the New Forest our costs of providing the service have risen by an average of 6% per annum whilst Supporting People funding has only risen by 2.5% on average. This shortfall was originally met by the Council passing these costs directly onto residents. However, following agreement between the Supporting People Administering Authority (Hampshire County Council) and all Districts in Hampshire it has been agreed that any difference between the costs of the Supporting People funding and the costs of providing the service would not be passed onto sheltered housing residents.
- 3.5 A further factor that has significantly raised costs was a corporate pay and reward review that was carried out during 2004/2005 into lower paid employees of the Council. This ultimately resulted in all sheltered housing managers moving up a salary band.
- 3.6 Whilst, in theory, it would be possible to meet the shortfall between the costs of the service and the income received by raising service charges, in reality this increase would not be met by a similar increase in Supporting People funding. This funding is based upon meeting average quartile costs for sheltered housing providers in the County and the Administering Authority are not prepared to meet actual costs that may be above these costs.
- 3.7 The result of the effective reductions in Supporting People grant combined with the increase in salary costs for the sheltered housing service means that there is an effective shortfall between the funding provided by Supporting People, (combined with the income from service charges), and the actual costs of providing the sheltered

housing service of £200,000 in 2006/2007. These costs can only be met by funding from the HRA (effectively all tenants paying for the sheltered housing service) or by achieving a reduction in costs of the current service equivalent to the shortfall. The former option is not really realistic bearing in mind the current pressures on HRA budgets following the conclusion of the Options Appraisal in 2005.

- 3.8 Therefore the only realistic option in finding the savings required is to critically examine the sheltered housing service to see whether savings can be made to meet the requirements and yet still maintain a viable service which meets the current tenant needs.
- 3.9 Whilst savings in service costs are required it is vitally important not to lose sight of the need to provide accommodation of the type and location where there is proven need and demand. This will also need to reflect the need for extra care provision and this can be identified in consultation with colleagues in Social Services.

#### **4 REVIEW OF THE SHELTERED HOUSING SERVICE**

- 4.1 As part of a review of the existing service a project team was established to look at options available. This project team comprised:-

Dave Brown	Assistant Director (Housing Services)
Sue Reynolds	Sheltered Housing Services Manager
Jane Wheeler	Lifeline Services Manager
Julie Price	Sheltered Housing Manager
Jan Rogers	Sheltered Housing Manger

- 4.2 To begin the process of the review visits were made to a number of other organisations who provide a sheltered housing service to see how they operated and what impact the Supporting People budgetary changes were having on them. The results of these visits confirmed in essence that each and every other organisation was facing similar problems to NFDC and either had or were carrying out a review of their services.
- 4.3 Those organisations who had already reviewed their service had in general reduced staffing levels, offered a choice of services to residents, and had critically examined the need for some of their existing sheltered housing units. On average it was identified that the ratio of sheltered housing managers to residents after a service review was 1:50 (One organisation had a ratio of 1:80).
- 4.4 Following the visits to other organisations the project team identified a number of issues for further discussion. These are listed below:-
- The future of Central Control. (A separate report on this issue is on the Panel's agenda today).
  - The need for some units of sheltered accommodation bearing in mind the issues of hard to let accommodation and, on the other hand, the need to provide extra care places in some schemes in partnership with Social Services.
  - The need for resident sheltered housing managers

- The ratio of sheltered housing managers to tenants (current NFDC ratio is approximately 1:33)
- Do we need to re-define the duties of a sheltered housing manager?
- Do we need to continue to provide a stand-by service?
- The sheltered housing managers do carry out a number of generic housing management tasks and these should rightfully be charged to the HRA as a non-support function. Further work needs to be done to identify the percentage of their time spent on such tasks.
- A review of the management and administrative support structure needs to be carried out.

## **5 BROAD PROPOSALS FOR CHANGE**

- 5.1 New Forest District Council provides a traditional sheltered housing service. There is a view that sheltered housing in this form is no longer appropriate as it offers a fixed service which does not respond to users' changing needs and demands. The modern view of sheltered housing is that it should provide a flexible service and support that can adapt to the changing demands of residents as they get older and more frail.
- 5.2 Another important issue for the Council is the impact of the recent Government Green Paper, *"Independence, Well Being and Choice, Our Vision for the Future of Social Care for Adults in England"* which describes ideas for adult social care over the next 10 to 15 years and how they might be realised. Whilst this paper is primarily about care and not support which is the essence of sheltered housing many principles aired in the paper will impact upon sheltered housing. Such principles are:-
- Giving individuals greater choice and control over the way their needs are met.
  - Enhancing the role of assistive technology and supported housing.
  - A greater emphasis on prevention
- 5.3 Providers of sheltered housing are now operating in a contract culture. Contracts under Supporting People must demonstrate:--
- Strategic relevance
  - Demand
  - Quality
  - Performance
  - Value for money
  - User involvement; and
  - Outcomes
- 5.4 As previously mentioned sheltered housing accommodation is generally more difficult to let than other general needs housing and this is particularly true of those schemes that are not centrally located near to shops and other amenities.

- 5.5 The issues in the previous paragraphs indicate that even without the financial issues mentioned in paragraph 3.4 and 3.5 a review of the service is necessary to meet the changing demands on the service.
- 5.6 The project team feel that to meet all the demands the service will invariably change and they are suggesting that this change should incorporate an appropriate resolution of the following issues:-
- Remove the need for residential scheme managers and provide the service on a more area basis with managers being responsible for a maximum of 50 residents who may live in two or more separate schemes.
  - Remove from sheltered accommodation status, schemes where the age and type of residents clearly indicate that the nature of the scheme has over the years changed into accommodation more akin to general needs housing albeit in a protected environment.
  - Work with Hampshire County Council's Supporting People liaison officer to ensure that any service provided meets the needs of our residents and at the same time meets the performance criteria as set out in paragraph 5.3.
  - Consult with Hampshire County Council Social Services to identify the need for extra care housing and to ensure that appropriate provision is allowed for in the process of the review.
  - Cease the current stand-by out of hours service.
  - Investigate opportunities to gain a more cost effective Central Control service.
  - Review the management structure and administrative support currently provided for the sheltered housing service.
  - Ensure the proper allocation of functions and charging for sheltered housing manager's time between support and general housing duties that can be charged to the HRA.
- 5.7 Subject to the views of the Panel it is intended to conclude the review of the sheltered housing service and produce a report on proposals to achieve the aims of providing a quality sheltered housing service that meets the current needs of residents and at the same time achieving the required savings in expenditure. It is proposed that any proposals will be implemented on 1 April 2007. A report will be presented to Cabinet detailing the proposals as soon as possible.

## **6 FINANCIAL IMPLICATIONS**

- 6.1 The proposals contained within this report will have the impact of reducing costs for the sheltered housing service.

## **7 CRIME AND DISORDER IMPLICATIONS**

7. There are no crime and disorder implications as a direct result of this report.

## **8 ENVIRONMENTAL IMPLICATIONS.**

8.1 There are no environmental implications as a direct result of this report.

## **9 PORTFOLIO HOLDER'S COMMENTS**

9.1 I understand the need to adapt services to meet current needs both in terms of the demand for sheltered housing and the available funding. I am also aware that the current service is very highly valued by residents and would wish to ensure that any changes proposed mean that a quality service continues to be provided and is properly funded.

## **10 ISSUES FOR THE PANEL**

10.1 At this early stage in the review process Members are asked to explore the possible changes proposed and make their views known on the proposals.

### **For further information contact:**

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### **Background Papers**

None



**SHELTERED HOUSING REVIEW WORKING PARTY**

**Members:**

Dave Brown	Assistant Director (Housing Services)
Sue Reynolds	Sheltered Housing Services Manager
Jane Wheeler	Lifeline Services Manager
Julie Price	Sheltered Housing Manager
Jan Rogers	Sheltered Housing Manager
Councillor Mrs Jill Cleary	Review Panel representative
Councillor Mrs Maureen Robinson	Review Panel representative
Peggy Brown	Sheltered Housing Tenant
Brenda Kerslake	Sheltered Housing Tenant
Pat White	TCG representative.

Scheme Details

Scheme	Area	No. of Units	Status of staff	Category of scheme	Other Info
Bannister Court	Totton	37	1R	2	
Barfields Court Carlton House Lime Tree House	Lymington	40 12 16	1R	Extra Care 1 1	
Campion House	Lymington	15	1M	1	
Clarks Close	Ringwood	20	1M	2	
Clover Court Foxglove Place The Mallow	New Milton	21 3 11	1R	2 2 2	
Compton House	Totton	24	1Non Res	2	
Corbin Court Efford Court	Lymington	32 13	1R	2 Link-in	
Cranleigh Paddock	Lyndhurst	18	1Non Res	2	
Davis Field	New Milton	3	1M	Link-in	
Evergreens	Totton	17	1M	2	
Ewart Court Brinton Lane	Hythe	40 4	1R	2 2	
Gore Grange	New Milton	37	1R	2.5	
Howard Oliver Harvey Gardens	Hythe	31 18	1Non Res	2 2	
Lawrence House	Hythe	22	1M	2	
Marryat Court Marryat Road	New Milton	32 29	1R	2 Link-in	
Rivers Reach	Lymington	8	1M	1	These also have flats which are not sheltered
Robertshaw House Foldsgate Close	Lyndhurst	25 9	1M	2 Link-in	
Sarum House	Totton	25	1Non Res	2	
Solent Mead	Lymington	15	1Non Res	2	
Whitcroft Deerleap Way	Hythe	18 8	1M	2 Link-in	
Willowtree House	Lymington	9	1M	1	These also have flats which are not sheltered

Scheme	Area	No. of Units	Status of staff	Category of scheme	Other Info
Wilson Court Albion Road Manor Close	Fordingbridge	13 20 10	1R	2	
Winfrid House Alexandra Close	Totton	26 6	1R	2.5 2	

Key: R = Residential Sheltered Housing Manager  
M = Mobile Sheltered Housing Manager  
Non Res = Non Residential Sheltered Housing Manager

## DAILY ROUTINE

Sheltered Housing Manager

Compton/Sarum House

At least three days each week I visit all my tenants. It has been agreed with my tenants that these visits take place on Mondays, Wednesdays and Fridays.

On Tuesdays and Thursdays I intercom.

Each day starts with contacting Central Control and dealing with any messages of incidents.

I am scheme manager of two schemes, each with 25 units of accommodation that are located next to one another and are on the same handset. This also means I am on-call to both schemes, which means going backwards and forwards if necessary between visits.

Visits start at 9.15am. The visits can take 4 hours, and each one varies, from saying a quick hello to someone needing a GP visit. Intercoms generally only take 30 minutes per scheme, but follow up calls take another hour at least per scheme.

Visits can be interrupted with emergencies, i.e. a tenant with chest pains:

- Asking questions about the emergency
- Calling for an ambulance
- Dealing with paramedics
- Photocopying shared information form
- Informing relatives

Approximately 30-60 minutes

With all visits completed, the register and diary must be completed, for both schemes and reporting any maintenance issues. This takes about 15 minutes per scheme

## LUNCH BREAK

30 minutes

Each afternoon I am available to assist tenants

- Completing housing benefit claim forms
- Completing incapacity claim forms
- Completing Attendance Allowance forms
- Understanding an official letter
- Complete a bus pass form
- Ordering repeat prescription

Between 1-3 hours every afternoon will be spent helping tenants with paperwork.

Other administrative type duties would include

- Identifying the need for a care package and arranging a Social Worker to visit
- Organising an Occupational Therapist referral
- Dealing with care agencies

I would spend on average 2-4 hours a week on these duties

**MANDATORY DUTIES** include (per scheme)

- Fire Alarm checks weekly
- Electrical checks monthly
- Battery back-up 6 monthly
- Gas/Electric readings 3 monthly
- Health & Safety (Paths and walkways) 3 monthly
- Gas fire checks monthly
- Fire Drills (full evacuation) 6 monthly
- Social fund accounts monthly statements
- Social fund accounts daily
- Inventory Yearly
- TV License renewal Yearly
- Water running (Legionella) Weekly
- Performance Monitoring forms Daily
- SHM Meetings 2 monthly
- 1-1 meetings monthly
- Support plan reviews 6 monthly

Mandatory duties on average take 2-5 hours a week

**ACTIVITIES** include

- Bingo twice weekly
- Hoy weekly
- Lions Club bingo monthly
- Monthly raffles monthly
- Tenants meetings every 2 months
- Fish and chip suppers monthly during cold weather
- Quiz nights monthly during winter months
- Games evenings monthly
- Coach trips 2-3 per year
- Entertainment evenings 2-3 per year
- Clothes parties twice yearly
- Disability aids promotions yearly

Each activity necessitates my involvement with arranging, organising, collecting money and attending - between 1 – 4 hours.

**NEW TENANTS**

- Showing property
- Answering questions
- Completing assessment sheet
- Complete sign-up form
- Complete contract and send to Appletree Court
- Complete Supporting People Subsidy form
- Complete TV license form
- Complete Shared Information details and fax to central control
- Complete Support Plan
- Help with any benefit claims form

A new tenant will take between 1-3 hours.

**GUEST ROOMS**

Monitor cleaning, changing bed linen after each use, collecting money, filling necessary paper work and taking money to local cash office - 1 hour each week

With two schemes, there are two guest rooms, the monies from which need to be documented and taken to a cash office ASAP.

Because we have daily coffee mornings and regular raffles, monies coming from these activities need to be entered into the social fund books and banked on a regular basis.

## **Appendix 5**

As a Sheltered Housing Manager at Ewart Court, Hythe, I have responsibility for 44 units of accommodation.

The tenants have daily contact Monday to Friday, consisting of 3 visits and 2 intercoms.

There are at least three social activities a week which are tenant led so continue during my absence.

As I also reside at Ewart Court I can be called for any out of hours emergencies on site. I am also part of the standby team which operates on a four weekly rota.

The tables that follow are an indication of my duties and the time it takes to fulfil them.

**Sheltered Housing Manager**

**Time Management**

**Daily Duties 7.5 hrs**

<b>Task</b>	<b>Priority 1-3</b>	<b>Allocated Time</b>
Tenant contact and support	1	4 Hours
Issues arising overnight	1-2	40 Minutes
Liaise with	2-3	40 Minutes
<ul style="list-style-type: none"> <li>• Contractors</li> <li>• Maintenance</li> <li>• Gardeners</li> <li>• Cleaners</li> </ul>		
Routine Admin	1-2	40 Minutes
<ul style="list-style-type: none"> <li>• Telephone Calls</li> <li>• Post</li> <li>• E Mail</li> <li>• Diary</li> <li>• Tenants Register</li> </ul>		
Contact with outside Agencies		
<ul style="list-style-type: none"> <li>• GP</li> <li>• CPN</li> <li>• Social Services</li> <li>• Home Care</li> </ul>		
Liaison with Housing Section	1	40 Minutes
Ensure Health and Safety		
Risk Assessments		
Report Faults		
<ul style="list-style-type: none"> <li>• Routine Maintenance</li> </ul>	1-2	10 Minutes
<ul style="list-style-type: none"> <li>• Warden Call</li> </ul>	1	Constant
<ul style="list-style-type: none"> <li>• Fire Alarm</li> </ul>	1	10 Minutes
<ul style="list-style-type: none"> <li>• Smoke Detectors</li> </ul>		
<ul style="list-style-type: none"> <li>• CO Detectors</li> </ul>	1	30 Minutes
	1	
	1	



## Sheltered Housing Manager

### Time Management

#### Weekly Duties

<i>Task</i>	<i>Priority</i>	<i>Time Allocated</i>
Health & Safety Checks: <ul style="list-style-type: none"><li>• Fire Alarm Tests</li><li>• Legionella Check</li><li>• Scheme Away List</li></ul>	1	30 Minutes
Social Events (Three Per Week) <ul style="list-style-type: none"><li>• Organise</li><li>• Promote</li><li>• Budget</li><li>• Attend</li></ul>	3	6 Hours
Course Work	2-3	4 Hours
NVQ Assessing	2	2-3 Hours
Meetings	1	3-4 Hours

#### Monthly Duties

<i>Monthly</i>	<i>Priority</i>	<i>Time Allocated</i>
Health & Safety <ul style="list-style-type: none"><li>• Small appliances check</li><li>• Property maintenance</li></ul>	1	1 Hour
Personal Development <ul style="list-style-type: none"><li>• 1 – 1</li><li>• Course</li></ul>	2 1-2	1 ½ Hours All day
Social Accounts/banking	1	1 Hour
Standby (O.O.H)	1	119 Hours

**Quarterly**

<b><i>Tasks</i></b>	<b><i>Priority</i></b>	<b><i>Allocated Time</i></b>
Health & Safety <ul style="list-style-type: none"><li>• Paths &amp; Walkways</li><li>• Meter Reading</li></ul>	1	¾ Hour
Tenants Meetings	1	½ Hour
Sheltered Housing Managers Meeting	1	3 Hours

**Six Monthly**

<b><i>Tasks</i></b>	<b><i>Priority</i></b>	<b><i>Allocated Time</i></b>
Health & Safety <ul style="list-style-type: none"><li>• Fire Drill</li><li>• Pull Cord Checks</li><li>• Battery back up checks</li></ul>	1 1 1	30 Minutes 1 Hour 3 Hours
Tenants Individual Support Plans	1	30 Minutes x 60

**Annually**

<b><i>Tasks</i></b>	<b><i>Priority</i></b>	<b><i>Allocated Time</i></b>
Social Account Audit	1	1 Hour
Scheme Inventory	1	1 Hour

**Scheme Details**

<b>Scheme</b>	<b>Area</b>	<b>No. of Units</b>	<b>Type</b>	<b>Category</b>	<b>Other Info</b>
<b>Albion Road</b>	<b>Fordingbridge</b>	<b>20</b>	<b>F</b>	<b>2</b>	<b>Linked to Wilson</b>
<b>Alexander Close</b>	<b>Totton</b>	<b>6</b>	<b>B</b>	<b>2</b>	<b>Linked to Winfrid</b>
Bannister Court	Totton	37	F	2	
Barfields Court	Lymington	40	F	Extra Care	
Brinton Lane	Hythe	4	B	2	Part of Ewart
Campion House	Lymington	15	F	1	
Carlton House	Lymington	12	F	1	Linked to Barfields
Clarks Close	Ringwood	20	F	2	
Clover Court	New Milton	21	B	2	
Compton House	Totton	24	F	2	
Corbin Court	Lymington	32	F	2	
Cranleigh Paddock	Lyndhurst	18	F	2	
<b>Davis Field</b>	<b>New Milton</b>	<b>3</b>	<b>F</b>	<b>Link-in</b>	
<b>Deerleap Way</b>	<b>Hythe</b>	<b>8</b>	<b>B</b>	<b>Link-in</b>	
<b>Efford Court</b>	<b>Lymington</b>	<b>13</b>	<b>B</b>	<b>Link-in</b>	
Evergreens	Totton	17	F	2	
Ewart Court	Hythe	40	F/B	2	
<b>Foldsgate Close</b>	<b>Lyndhurst</b>	<b>9</b>	<b>B</b>	<b>Link-in</b>	
Foxglove Place	New Milton	3	B	2	Part of Clover
Gore Grange	New Milton	37	F	2.5	
<b>Harvey Gardens</b>	<b>Hythe</b>	<b>18</b>	<b>F/B</b>	<b>2</b>	<b>Linked to Howard Oliver</b>
Howard Oliver	Hythe	31	F	2	
Lawrence House	Hythe	22	F	2	
<b>Lime Tree House</b>	<b>Lymington</b>	<b>16</b>	<b>F</b>	<b>1</b>	<b>Linked to Barfields</b>
<b>Manor Close</b>	<b>Fordingbridge</b>	<b>10</b>	<b>F</b>	<b>2</b>	<b>Linked to Wilson</b>
<b>Marryat Road</b>	<b>New Milton</b>	<b>29</b>	<b>B</b>	<b>Link-in</b>	
Marryat Court	New Milton	32	F	2	
<b>Rivers Reach</b>	<b>Lymington</b>	<b>8</b>	<b>F</b>	<b>1</b>	<b>These also have flats which are not sheltered</b>
Robertshaw House	Lyndhurst	25	F	2	
Sarum House	Totton	25	F	2	

Scheme	Area	No. of Units	Type	Category	Other Info
Solent Mead	Lymington	15	F	2	
The Mallows	New Milton	11	B	2	Part of Clover
Whitecroft	Hythe	18	F	2	
<b>Willowtree House</b>	<b>Lymington</b>	<b>9</b>	<b>F</b>	<b>1</b>	<b>These also have flats which are not sheltered</b>
Wilson Court	Fordingbridge	13	F	2	
Winfrid House	Totton	26	F	2.5	