



Sheltered Housing in Medway



December 2005
Health and Community Services Overview and Scrutiny Committee

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Foreword

“Sheltered housing provides older members of our community with independence, peace of mind, security and support. The council has a duty to provide the best accommodation possible within the resources available. Following the outcome of the Stock Options Appraisal it has been evident that some of the council's sheltered housing stock will require substantial investment in order to meet the basic standards.

This review presents the findings of the task group and makes recommendations for the future design and provision of sheltered housing in Medway. The report outlines the changes and developments which will need to take place to ensure that the provision of independent living accommodation in Medway continues to meet the needs and aspirations of current and future tenants.

We hope that this review provides a pathway to providing the type and quality of accommodation we would like to see in the future”



Councillor Wendy Purdy
on behalf of the Sheltered Housing Task Group



Cllr. Jane Etheridge
(Conservative)



Cllr. Karen Griffin
(Liberal Democrat)



Cllr. Paul Harriott
(Labour)



Cllr. David Royle
(Conservative)

Introduction

1. The Health and Community Services Overview and Scrutiny Committee established an in-depth inquiry into the provision of sheltered housing in Medway. They agreed the membership of the group to carry out this work would comprise: -

Councillor Jane Etheridge – Conservative
Councillor Karen Griffin – Liberal Democrat
Councillor Paul Harriott – Labour
Councillor Wendy Purdy – Conservative (Lead member on the task group)
Councillor David Royle – Conservative

2. The terms of reference for this inquiry were as follows: -

To evaluate the Council's sheltered housing stock taking into account the following elements:

- To review the adequacy and standards of existing accommodation for older people in the council's housing stock
 - To review the support services provided by the council in designated sheltered housing accommodation
 - To research and identify sheltered housing and similar schemes provided by other registered social landlords and the private sector
 - To evaluate and consider future demands for sheltered housing and extra care housing in Medway, including the demand for and popularity of traditional sheltered housing accommodation
 - To consider possible options for re-modelling the council's sheltered housing accommodation to meet the needs and aspirations of current and future service users
 - To consider the ability of public funds to support current and future sheltered housing provision and other similar schemes such as extra care
 - Research the possibilities of joint funding or operation of projects with external partners.
3. The task group members agreed to receive evidence from a range of sources including discussions with the Portfolio Holder, Director of Health and Community Services, council officers, members of the tenants association 'MeRGe' and providers of sheltered housing schemes in Medway. The activity of the task group is shown in Table 1.

Table 1

Date	Venue	Investigation/attendees
18 August 2005	Civic Centre, Strood	<p>Introductory meeting to discuss the issues and the profile of sheltered housing in Medway.</p> <p>Meeting with:</p> <p>Housing Services Manager, Peter Dosad Estate Services Manager, Paul Laws,</p>
28 September 2005	Various locations, Rainham and Gillingham	<p>Visit to all 11 sheltered housing units, discussion with residents, Scheme Manager, viewing of rooms, conditions and design of buildings. Look at improvement works at some schemes.</p> <ul style="list-style-type: none"> • Esmonde House, Brompton • Shalder House, Medway Road Gillingham • Fizthorold House, Church Street Gillingham • Brennan House, Victoria Street, Gillingham • Mouteavens House, Skinner Street, Gillingham • St. Marks House, Saxton Street, Gillingham • Woodchurch House, Twydall • Suffolk Court, Suffolk Avenue, Rainham • Marlborough House, High Street, Rainham • Longford Court, High Street, Rainham • Queens Court, Chichester Close, Rainham
19 October 2005	Civic Centre, Strood	<p>Discussion on visits to sheltered units, emerging themes and options:</p> <p>Meeting with:</p> <p>Chairman 'MeRGe'(tenant forum), Mary Butcher, Housing Services Manager, Peter Dosad, Assistant Director Business Support, Geoff Ettridge, Assistant Director (Financial Management), Mick Hayward Team Leader (Social Services and Litigation), Stephen Lawrence, Legal Services Estate Services Manager, Paul Laws Secretary 'MeRGe' (tenant forum), Elisabeth Roche Service Standards Manager, Jeremy Shannon Assistant Director Social Care, David Wilkinson</p>

<p>27 October 2005 (Evidence Session 1)</p>	<p>Civic Centre, Strood</p>	<p>Discussion on options and impact of emerging recommendations.</p> <p>Meeting with:</p> <p>Housing Services Manager, Peter Dosad Estate Services Manager, Paul Laws Service Manager, Older People, Andre Fox Residential and Respite Care Manager, Liz Nicholas</p>
<p>27 October 2005 (Evidence Session 2)</p>	<p>Civic Centre, Strood</p>	<p>Meeting to discuss the issues relating to Decent Homes Standards and alternative uses of schemes.</p> <p>Meeting with:</p> <p>Director of Health and Community Services, Ann Windiate, Portfolio Holder, Adult Services, Tom Mason</p>
<p>27 October 2005 (Evidence Session 3)</p>	<p>Civic Centre, Strood</p>	<p>Discussion about 'MeRGe's independent visit to sheltered housing units and general views about future of sheltered schemes.</p> <p>Meeting with:</p> <p>Chairman 'MeRGe' (tenant forum), Mary Butcher Secretary 'MeRGe' (tenant forum), Elisabeth Roche</p>
<p>9 November 2005</p>	<p>Civic Centre, Strood</p>	<p>Final meeting to discuss the outcome of the review and the impact of the recommendations.</p> <p>Meeting with:</p> <p>Director of Health and Community Services, Ann Windiate, Portfolio Holder, Adult Services, Tom Mason, Housing Services Manager, Peter Dosad, Estate Services Manager, Paul Laws, Service Manager, Older People, Andre Fox Service Standards Manager, Jeremy Shannon Assistant Director Social Care, David Wilkinson Secretary 'MeRGe' (tenant forum), Elisabeth Roche Chairman 'MeRGe'(tenant forum), Mary Butcher Supporting People Manager, Evelyn White Sheltered Service Manager, Sherree Westwood</p>

Background

3.1 The Changing Face of Sheltered Housing

3.1.1 Sheltered and retirement housing provides a key source of housing for older people. More older people (two thirds of a million) in the UK currently live in sheltered and retirement housing than in residential and nursing care put together.

3.1.2 Sheltered and retirement housing was originally intended for fit, active people, with a view that as people became older and frailer, and their mental health deteriorated they would move into residential care. However, demographic trends and the increased availability of community care services have led to an older and frail population living, or wishing to live, in sheltered and retirement housing.

3.1.3 In the UK, in 2002 according to estimates based on the 2001 census there were over 10.9 million people of pensionable age:

- 9,101,000 in England
- 950,000 in Scotland
- 588,000 In Wales
- 266,000 in Northern Ireland

of the total numbers of older people in the UK, in 2002:

- 4,464,000 were aged 75 and over
- 1,124,000 were aged 85 and over

This represents an increase from the previous census, and the older population in the UK continues to rise. Further trends from the 2001 census with implications for sheltered and retirement housing providers include:

- Increased life expectancy, improved health and living standards
- The population of older black and minority ethnic (BME) people can also be expected to increase, e.g. In the 2002 census 9% of black caribbeans and between 2% and 6% of other BME groups were aged over 65.
- An increase in the number of the very old (aged over 85 years) which has clear implications for sheltered housing providers

3.1.4 In 2001 4% of people aged 65-69, 7% of people aged 70-74, 10% of people aged 75-79, 13% of people aged 80-84 and 19% of people aged 85 and over lived in sheltered accommodation

3.1.5 The sheltered housing service has therefore evolved in response to these changing needs and new models of extra care sheltered housing

are being developed. Models of 'Extra Care' are being developed in Medway and there are plans to extend this service.

- 3.1.6 In 2003 independent national research was commissioned by McCarthy and Stone the UK's leading provider of private sheltered housing. The research found that moving to sheltered housing has significant effects on residents' quality of life, health and general sense of well being.
- 3.1.7 The research found that 64% of residents felt their well being had improved since moving into sheltered accommodation and 83% said it had helped them to maintain their independence. Notwithstanding an average age of 79 years, 41% reported that their health had improved. 92% would recommend sheltered housing to their friends.
- 3.1.8 In 2000, the government took steps to bring all public sector homes up to a 'decent' standard, establishing a 10-year target and an interim target.
- 3.1.9 The Decent Homes Standard (DHS) is a standard, which includes modern kitchens and bathrooms, central heating and double-glazing. Each home should also be in good repair and have modern heating and insulation systems. All social housing is required to meet the DHS by 2010.
- 3.1.10 In order to identify how the Council would achieve this, Medway Council undertook a Stock Options Appraisal to: -
- assess the level and type of disrepair within their stock, compared to the decent homes standard, and how much will it cost to bring homes up to standard
 - use an analysis of the local housing market, particularly relating to demand and supply for council housing to decide whether and where stock should be demolished
 - assess the options available to them for raising the necessary investment, to determine which are viable and which is the preferred option
 - work to improve their repairs, maintenance and improvement services to ensure they are achieving the best value for money
- 3.1.11 The results of the process were published and a test of opinion with residents took place. A recommendation was made to Health and Community Services Overview and Scrutiny Committee and thereafter to Cabinet for the council to retain its housing stock. This recommendation included the councils 'sheltered' housing.

- 3.1.12 The decision to retain the Council's housing stock in accordance with the outcome of the test of opinion with tenants was supported by Cabinet, although it was decided not to bring three of the sheltered housing schemes to the required standard.
- 3.1.13 Health and Community Services Overview and Scrutiny Committee established a task group to undertake a piece of work to identify the direction of sheltered housing in Medway.

4. Council Sheltered Housing Schemes in Medway

- 4.1 The Council has 11 sheltered housing schemes situated in the Gillingham/ Rainham areas of Medway. The schemes provide 375 units of accommodation.
- 4.2 Queens Court, Fitzthorold House and Shalder House are the schemes identified as having a requirement of £7m in order to bring them up to the required standard. These 3 schemes represent a combined total of 88 units of accommodation.
- 4.3 The remaining 8 sheltered housing schemes provide a varying design of accommodation with only 4 requiring a minimum or no investment to bring them to the required standard. 4 homes require more significant investment such as the installation of passenger lifts and the remodelling of individual units to establish a bathroom within the living space.
- 4.4 A summary of the schemes and the type of accommodation is shown in **(A1)**.
- 4.5 There are a number of considerations, which need to be taken into account when coming to a decision on the long-term future of the sheltered housing units.
 - The demand for and popularity of 'traditional' sheltered housing schemes in Medway
 - Changing aspirations and expectations of tenants, now and in the future
 - The continuing availability of public funds to support the refurbishment and replacement of schemes
 - The ability of the Housing Revenue Account Business Plan to fund improvements or re-provision along with the other demands of the Decent Homes Standard on the councils wider housing stock
 - The future demand for older person's accommodation in Medway
- 4.6 Members of the task group have visited all 11 of the council's sheltered housing units to look at the exterior and interior of the buildings and to gain the views and comments of residents.
- 4.7 Representatives from the tenant forum 'MeRGe' (Medway Residents Group) were invited to attend meetings held by the task group and have participated in discussion.

- 4.8 Representatives from 'MeRGe' also gave their views at an evidence session on 27 October 2005.
- 4.9 Members found that older residents were happy with their accommodation, however councillors were unanimous in their opinion that some schemes are not homely and are not fit for purpose and will not meet the aspirations of residents in the future.
- 4.10 The three schemes, which do not meet the Decent Homes Standard, are particularly poor and provide extremely small living areas for residents and are not suitable for older more frail residents who may require Extra Care. The task group identified the following areas of concern:
- Communal bathing facilities
 - Very small rooms, combining lounge, sleeping area and cooking facilities
 - No division between sleeping, living areas, in some homes no division between the cooking area and the lounge area
 - Poor communal area decoration
 - Limited storage facilities
 - Tired exterior of buildings
 - Obvious adaptations for heating water systems, not sympathetically redecorated
 - Some communal areas not used
 - Adaptations for walk in shower rooms – not particularly well designed, largely due to lack of available space

5. Changing Expectations

- 5.1 Changes in the expectations of older people have and continue to have a profound impact on sheltered housing providers including those offered by local authorities including Medway Council.
- 5.2 Potential tenants are increasingly 'put off' by unsuitable buildings, inconvenient locations, outdated facilities, and the outdated culture and institutionalised reputation which sheltered housing has.
- 5.3 The schemes provided in Medway represent a differing quality and model of sheltered housing ranging from old-fashioned bed sit accommodation to more suitable two bedroom modern designed flats.
- 5.4 Medway Council is typical in reviewing its sheltered housing schemes and assessing the cost effectiveness of remodelling programmes. A number of councils have undertaken this work in consideration of the implementation of the Decent Homes Standard and Stock Options Appraisals.
- 5.5 Nationally some providers have created 'Extra Care Schemes' in partnership with health and social services, in order to meet the needs of a frailer client group. Medway Council has taken steps to provide these services at some of its schemes and is undertaking a remodelling of Brennan House (33 units) to provide this facility.
- 5.6 Some providers across the country have moved towards allocating some difficult-to-let sheltered provision to other vulnerable groups.
- 5.7 In addition to demanding a better quality environment, older people are now more likely to expect to be treated with respect as a 'customer' by their landlord and by professional scheme managers.

6. Feedback from Residents

- 6.1 When talking to residents currently residing in the three units which do not meet minimum standards, they stated that they are happy with their accommodation. However they understood that the rooms do not meet the new required standards.
- 6.2 Main concerns of residents related to the timescales for moving, whether they would receive individual help and assistance in identifying new accommodation and financial assistance in relation to their moving costs.
- 6.3 Residents continue to be worried about the future and have requested that the council consult with them to ensure their views and concerns are represented. A tenant newsletter explaining the work of the task group was sent to residents (see background documents) to share information about the remit of the task group and invite their views.
- 6.4 Verbal comments from residents at Queens Court included:-
- “we don’t want to move but if we have to move we want to move as soon as possible”*
- “when will we know what is happening and when is the building is closing?”*
- “will we get help to move our things?”*
- “what other accommodation have you got that we can move to?”*
- 6.5 In the remaining 8 sheltered housing schemes, which will meet the minimum standard, residents commented that they were pleased with their accommodation and the planned improvement works.
- 6.6 Members of the task group were invited and welcomed into the homes of 9 residents.
- 6.7 Members viewed the improvements being made to improve some of the schemes but raised concern about the short-term investments in passenger lifts and the remodelling of some units to provide individual bathrooms.
- 6.8 There remains a concern that in the long term the units will fail to meet the expectations of potential tenants, however the installation of lifts and changes to individual homes may have an impact on occupation.
- 6.9 Close monitoring of the effective use and occupation levels of the remaining sheltered units must remain a priority.

7. Ensuring Value for Money

The task group have considered the effective use of existing sheltered housing provision and explored the alternative uses for sites and buildings.

Effective use of Resources – Asset Management

- 7.1 Wherever possible the Council must exercise caution when disposing of land. It is the task groups conclusion that in all cases where land is considered excess to requirements then **'best consideration'** for the use of the land should be a priority. The task group stress the need for clarity in the application of 'best consideration' and the task group make a recommendation in this respect in Recommendation 9.8 of this report.
- 7.2 The council needs to ensure value for money, however it should ensure that alternative uses for the land are explored to see how local residents could benefit from the land being used to extend and/or improve services which the Council provides in Medway.
- 7.3 The task group makes specific reference to the disposal of land/assets to benefit future services in Medway in **Recommendation 9.8** of this report.

Providing Services Locally – Focus on Disability Services

- 7.4 There are services which the council is forced to purchase outside of the Medway area, such as services for clients with learning disabilities, and those with physical disabilities. This is purely because the services do not exist in Medway.
- 7.5 The task group considered the 231 clients who are currently receiving services to support learning disabilities. The cost for all clients is forecast to be £13,465,629.79 annually. Almost 50% of clients receive services outside of Medway.
- 7.6 19 clients receive services as far away as Northumberland and Devon.
- 7.7 The task group have concluded that these services should be provided in Medway.
- 7.8 Vulnerable clients require the support of their network of family and friends and wherever possible services should be provided locally.

- 7.9 Almost 50% of the monetary investments in relation to disability services go outside the Medway health economy. The task group recommends that wherever possible the investments should remain in Medway.

Joint Working – Career Development

- 7.10 The task group has considered the staffing issues relating to the establishment of new services such as a learning disability service and are encouraged by the joint work with the local university, Mid Kent College and the Council.
- 7.11 Partnerships are working well and specific courses are being designed for social care workers to provide a career pathway and nationally recognised qualifications. This work will support the growing number of care sector workers required to support new services and replace staff who are retiring from the sector.
- 7.12 Joint working to help provide suitably qualified care staff will alleviate the reliance on agency care staff.

8. Conclusions

- 8.1 In conclusion the task group has identified that the Council has worked well towards meeting the needs of service users in our sheltered housing schemes, however the current composition of sheltered housing stock no longer presents a standard of accommodation which is acceptable or desirable.
- 8.2 The Council's current accommodation is outdated and 'tired'.
- 8.3 Major investment in the sheltered schemes which do not meet Decent Homes Standard namely Queens Court, Fitzthorold House and Shalder House (sum required £7m) will not present value for money.
- 8.4 The Council must move swiftly to identify suitable partners to re provide and extend sheltered and retirement accommodation which will assist older people to maintain their independence.
- 8.5 The current one bedroom bed-sit style of accommodation is not suitable for providing efficient extra care support for residents and is particularly restricting for older people with physical disabilities. Therefore the Council must phase out this type of accommodation over time and any new build should provide 2 bedrooms and a separate lounge and kitchen area.
- 8.6 Members have paid particular attention to the rehabilitative care currently provided at Shalder House. This service has been provided to support older people in preparation towards independent living in their own home. Members stress the need to ensure that this service continues as delayed discharges from hospital fines can be imposed by the local NHS Trust should older people be delayed from leaving hospital.
- 8.7 Members recognise that any changes to older persons accommodation can be a worrying time, therefore the needs of the individual and their personal circumstances should be of paramount importance when any changes are planned.
- 8.8 The task group members recognise that tenants are worried about the financial impact of any move and are keen that tenants do not suffer financially. Officers are urged to consider financial impact for each resident and exercise their discretion where small increases in payments are required.

- 8.9 The Task Group are aware that a small number of tenants who are currently receiving supporting people monies may incur a small increase should they move to alternative accommodation. The task group are keen that officers exercise their discretion in these cases especially in circumstances where tenants move to accommodate the Council's development plans.
- 8.10 Members agree with tenants views that that if there are any changes to tenants accommodation these need to be handled efficiently and that asked that they have one point of contact for queries. In response to this the task group have considered the additional requirements and responsibilities for this type of post which would include:-
- to be the focal point for tenants regarding the entire sheltered decant process.
 - completion of needs assessment plans for each resident.
 - consultation with residents regarding the process on an individual and group basis.
 - processing home loss applications.
 - finding alternative suitable accommodation for each resident.
 - liaising with Medway's and partner Registered Social Landlords allocation teams.
 - arranging and supervising removals & liaison with the utility companies.
 - Liaison with SP team and social services (older people team).
 - settling in visits once moves have occurred.
 - managing the "decant" budget.
 - supporting the sheltered managers in re-assuring residents throughout the process.
 - liaison with estate management regarding rent issues.
 - Liaison with Housing benefit and council tax on residents behalf.
 - the post would be become part of the sheltered team and be line managed by the Sheltered Housing manager within Housing Services.
 - be a key member of the envisaged "sheltered decant project team".

9. Recommendations

In consideration of the work carried out by the Task Group and in consideration of their findings the recommendations to Cabinet are as follows:-

- 9.1 Queens Court, Fitzthorold House and Shalder House sheltered housing schemes be closed as sheltered housing units for older people, and suitable older persons retirement accommodation be re-provided in Medway in accordance with the subsequent recommendations in this report.
- 9.2 That officers do not proceed to vacate Shalder House, Fitzthorold House and Queens Court until such time as a full impact assessment and structured and costed decant plan has been produced and presented to Overview and Scrutiny and Cabinet.
- 9.3 Officers be instructed to research the investment opportunities including partner investment and lease back arrangements which might be available through partnership working with other housing providers or through external funding opportunities with a view to modelling developments as outlined in 9.5 and 9.6 of this report.
- 9.4 Where appropriate officers be instructed to undertake competitive tendering processes in order to support the recommendations for improvements to services for older people as outlined in this report.
- 9.5 Officers be instructed to model developments at **Queens Court** as follows:-
 - a. That this site be cleared and replaced with a new development which provides an integrated facility for people with a learning or physical disability. Providing two distinct areas of care for each of these client groups for independent living and respite care.
 - b. To ensure occupation to the point of clearance and prevent rent loss, officers be instructed to provide short term tenancies to suitable clients who are currently homeless.
- 9.6 Officers be instructed to model developments at **Fitzthorold Site and Shalder House Site** as follows:-
 - a. Establish a new development providing older peoples retirement accommodation, re-provided on the most appropriate of these sites. The new development to include Extra Care facilities and domestic assistance services.

- b. The new facility include at least 11 units of rehabilitative care to limit delayed discharges from hospital and associated fines.
 - c. To ensure occupation to the point of clearance and prevent rent loss, officers be instructed to provided short term tenancies to suitable clients who are currently homeless.
 - d. Remove properties at Fitzthorold House and Shalder House from the rent debit and property database
- 9.7 That officers be instructed to exercise discretion in assisting the transfer of tenants of Queens Court, Fitzthorold House and Shalder House in respect of the Home Choice housing allocation system. Therefore any suitable alternative housing which becomes available should be offered to sheltered housing tenants who wish to move to other available accommodation within the Council's housing stock or stock offered by one of the council's partner providers.
- 9.8 In consideration of 7.1 and 7.2 of this report concerning the effective use of land and the application of 'Best Consideration', officers be instructed that prior to determining that an asset in the form of land/or buildings is surplus to requirement any alternative use of the land for 'Priority Services' (such as affordable housing and services for those with learning and physical disabilities) should be a paramount consideration. That officers apply this recommendation in the context of balancing the attraction of short term financial gain for the Council with the need to provide services in Medway and limit expensive services purchased outside of the local authority area.
- 9.9 As the council moves towards implementation, officers be instructed to carryout consultation and a risk assessment with each resident of the three sheltered housing schemes to ensure that suitable alternative accommodation is identified.
- 9.10 In order to limit the financial impact for tenants officers be instructed to apply the Home Loss Payments (England) Regulations 2003 No. 1706). Officers to ensure that where discretion is applied, moving costs and items such as costs of new carpets and curtains are compensated.
- 9.11 In order to limit the financial impact for tenants who wish to move to alternative accommodation in order to assist the Council's development plans, officers be instructed to apply their discretion when considering any small increases in rents.

- 9.12 That officers be instructed to work closely with those tenants who wish to find accommodation outside of the Council's housing stock, including those who wish to move out of the area to be closer to family and friends.
- 9.13 That Cabinet approve the additional post of 'Sheltered Housing Tenant Liaison Officer' B1 (£20,970-£27,411) per annum. This post to be a fixed term contract for the duration of the decant and rebuild project. This post to be funded from the Housing Revenue Account.
- 9.14 That Cabinet approve the retention of the 8 remaining sheltered housing units.
- 9.15 That officers be instructed to report any substantial changes to provision and any proposed remodelling works in regard to sheltered housing to the appropriate overview and scrutiny committee as an item of pre-decision scrutiny before any substantial works are undertaken.
- 9.16 That officers be instructed to undertake research with current tenants to identify the demand for domestic assistance services and report back to the appropriate overview and scrutiny committee upon completion.
- 9.17 That the Assistant Director, Service Development (Community Services), be instructed to report back to the appropriate overview and scrutiny committee within 6 months with detailed outline proposals and feasibility studies based on the recommendations outlined in this report.

SHELTERED HOUSING PORTFOLIO OF ACCOMMODATION