

# Making your sheltered housing stock and service fit for purpose: The challenge for sheltered housing providers

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**Peter Fletcher Associates**  
HOUSING, HEALTH &  
SOCIAL CARE CONSULTANCY



# Making your sheltered housing stock and service fit for purpose: The challenge for sheltered housing providers

The aspirations of older people are changing, and increasingly Sheltered Housing providers face issues of lettability and stock condition. This has led to many providers identifying the need to appraise their sheltered stock and service to ensure sustainability.

## **Consultancy and support to address the challenge**

Working in conjunction with the Northern Housing Consortium (NHC), Peter Fletcher Associates (PFA), has developed a package of practical help and support tools specifically designed for Sheltered Housing providers. We understand that needs differ greatly from provider to provider, and have developed a pick and mix menu of service options to choose from.

## **What we offer**

Stages of a systematic approach.



# Understanding the work to be undertaken

## 1: Project definition

A half day diagnostic workshop with key staff to understand the issues for your organisation and identify the way forward.

The cost of a half day workshop and summary report would be £684 plus travel and VAT. This cost is built into element 2 if providers wish to purchase this service.

# Understanding your sheltered housing stock and who you house

## 2a: Property surveys - sheltered and extra care

Our property surveys are designed to provide indicative information about a scheme's current and potential future sustainability, and to provide data analysis to inform more detailed work on outcomes, options and business planning. Examples of data include:

- Number and percentages of flats that are bedsits, one or two bedroom
- Number of residents making dependency moves into residential or nursing home care
- Access issues within the scheme including lift access to the upper floors
- Location of the scheme in relation to local health services, transport, leisure and shopping facilities
- Lettability of schemes and local competition from other

providers

As with the resident survey, the property survey can provide benchmarking information.

We can divide the schemes into bandings based on their scores, or use a traffic light system to identify schemes at risk; those that need regular monitoring, and those that are fit for purpose. We support this with good practice information to help you improve management processes.

### **What is provided**

- Half day face-to-face set up meeting (this could also cover set up for a broader option appraisal exercise)
- Up to half a day handling queries and progress chasing
- Half day face-to-face feedback meeting to validate and agree findings
- Written report - see outputs below

### **Optional extra**

Validation visits to some or all of the schemes could be undertaken at extra cost, based on visiting up to six schemes in one day if they are in a close geographical location.

### **Outputs**

- Individual report for each sheltered scheme showing scores and traffic lights against the main elements of the survey
- Individual report for each scheme relating to key building elements and capital renewal items
- Overview report for all the sheltered schemes in the survey, comprising up to 22 charts, tables and commentary

### **Costs**

Number of schemes	Cost (£)
1-5	2,280
6-10	2,850
11-15	3,420
16-20	3,990
21-30	5,130
31-40	5,985
41-50	6,840
Over 50	By negotiation

## 2b: Resident survey - sheltered and extra care

The resident survey is designed to find out who is living in your sheltered housing (and in particular their ages, gender and need for care and support services), and provides an initial benchmarking exercise to ‘future proof’ the stock, assess sustainability and identify those schemes that will need more detailed technical assessment.

The resident survey can provide a useful ‘trading’ tool for discussions with social services - for instance, moving sheltered schemes along the continuum to extra care housing where there are high numbers of frail older people all accessing social care services such as domiciliary and day care. It also provides valuable information to inform possible decommissioning arrangements.

### What is provided

- Half day face-to-face set up meeting (this could also cover set up for a broader option appraisal exercise)
- Up to half a day handling queries and progress chasing
- Data entry of survey data provided by the service provider

onto an Excel spreadsheet

- Half day face-to-face feedback meeting
- Written report - see outputs below

### Outputs

- Overview report of all the sheltered schemes in the survey with 18 tables and charts and commentary
- Additional analysis of qualitative questions
- Comparative tables ranking dependency levels and services for all schemes

### Costs

Number of schemes	Cost (£) for stand alone resident survey	Cost (£) for resident survey if done with property survey
1-5	2,280	1,140
6-10	2,850	1,425
11-15	3,420	1,710
16-20	3,990	1,995
21-30	5,130	2,565
31-40	5,985	2,993
41-50	6,840	3,420
Over 50	By negotiation	By negotiation

### Note

Resident and property survey costs are based on multiples of sheltered schemes and relate to providers in the North of England – for providers in other parts of the country there would be additional costs for the set up and feedback meetings because of travel time. Costs exclude travel and VAT.



**If the resident survey and property survey are carried out at the same time considerable savings can be made - this is reflected in the costs in the right hand column (above).**

Both of these surveys can be used by providers as standalone tools or as part of a wider appraisal. We will provide a standard data set, including an overview report on your stock and a comprehensive report for each scheme looking at sustainability across a number of elements.

### 3: Optional appraisal

In scoping the options appraisal, we would identify and agree with your organisation the elements of the work you wish to do in-house and the work we would undertake. It is vital that the information available is both comprehensive and accurate in order to ensure that the outcomes and options are robust and underpinned by sound evidence. We would seek to undertake a number of scheme visits to validate this process, and, if necessary, a number of technical survey reports. Our process also includes a scheme appraisal checklist to ensure that nothing is missed.

Examples of areas to address include:

- **Local market analysis and needs assessment.** We use this analysis to inform our advice on options, such as opportunities to work with partners in social care and/or to develop new forms of provision, such as extra care for sale or rent
- **Financial analysis.** We can provide advice and support on rents and service charges to inform business planning and options appraisals

- **Technical surveys.** The sheltered survey and options appraisals will often identify schemes that would benefit from a detailed technical survey. This may include anything from specific surveys, such as the feasibility and costs for the installation of a through-floor lift, to more detailed work such as appraising alternative uses of the building or commercial value for the building and/or the site

The options appraisal process can be used for single schemes; groups of schemes within a single locality, or to schemes spread around the country, owned and managed by national organisations.

### Costs

The option appraisal work is negotiated individually with each client, depending on the elements required. These would normally include:

- Strategic analysis
- Local market and needs analysis
- Technical analysis – building type and condition
- Service model
- Future viability

If linked to the sheltered surveys, the Options Appraisal would normally cost between £5,700 and £11,400, depending on the number and geographical spread of schemes.

## 4: Business planning and implementing change

The key ingredients to business planning are good financial and business information (which we can help to generate, if necessary), together with sound options appraisal information.

Change implementation work can include HR and staffing issues, particularly managing the change to a more customer-led approach based around the needs and aspirations of older people.

**Whether you choose to let us manage the options appraisal stage for you, or whether you conduct this work in-house, for the planning stage to be a success there will need to have been some detailed and specific work on the sheltered housing stock in order to inform the business plan and/or asset management strategy. Typically this work will include:**

- A SWOT analysis
- Environmental analysis of the local market, local competition and needs and aspirations of older people
- Situation analysis – capacity of our commissioners to manage change, including Boards and/or elected members

- Strategic fit – internal and external
- Financial analysis
- Risk analysis
- Strategic options and business plan

Implementing change is often the hardest part of any process. We can provide project management support to work with the following groups:

- Boards, tenants and other stakeholders
- Staff – including job descriptions, adverts and appointment of key staff where this is required

We can also help you with:

- Policies and procedures – to ensure these reflect new working practices
- Briefings and reports for committees and staff teams
- Meetings and presentations – to communicate outcomes from work and ensure staff, residents and other stakeholders understand any changes
- Training

Some clients wish us to work with them on business planning and help formulate asset management strategies.

**Business planning** can include a range of tasks, including HR, financial analysis, and working with boards and customers.

Costs vary as to how detailed the Options Appraisal work has been, but can be between £3,420 and £17,100 depending on the scale of work.

**Asset Management Strategy** may also include technical stock condition assessments of schemes.

## **Costs**

Costs are likely to be between £5,700 and £34,200 depending on the number of schemes and whether or not technical stock surveys are required.

## 5: Cost package for NHC members

NHC Members will be able to purchase these services at a discount on these published prices.

All costs exclude travel and VAT.

# Our expertise

## Peter Fletcher Associates (PFA)

Peter Fletcher Associates (PFA) has been working for many years, both with local authorities and directly with providers, to appraise their sheltered housing requirements.

Our range of tools have been developed in consultation with our commissioners, who include local authorities, ALMOs, LSVTs, RSLs, and private sector providers and developers.

Our tools reflect both the local and national policy context for the development and modernisation of housing care and support services for older people. They support the process of dialogue and discussion with a range of stakeholders, including staff, Boards, elected members, residents and social care and housing commissioners.

When carrying out option appraisal and assessing the various options and outputs, we would always be considerate of local constraints, such as promises made to residents, views of Board members and SP commissioners.



We have built up a considerable amount of good practice material which we would automatically offer as part of a commission.

### **Integrated Living Network**

The Integrated Living Network (ILN), delivered by the Northern Housing Consortium, aims to support the housing sector to improve the well-being of tenants and the communities in which they live by working in more effective partnerships with health and social care. The ILN will provide practical support including policy analysis, briefing papers, toolkits, conferences, networking opportunities and procurement solutions delivered through four key workstreams - reshaping service delivery, preventative services, measuring outcomes and resources.

We work with a range of experts and look forward to bringing further outputs which address some of the key future challenges facing our members. These include:

- Gathering baseline evidence of the health and wellbeing of our communities
- Measuring the impact of housing interventions on health
- Implications of Individual Budgets on commissioning and contracting
- Regional models of capital and revenue funding alignment
- Appraisal and sustainability of traditional sheltered housing

# Case study 1

## Shoreline Housing Partnership

Shoreline Housing Partnership is a local authority stock transfer organisation which took over the housing stock of North Lincolnshire Council in 2005. They manage 8,200 homes including housing for older people. They inherited a large number of purpose built sheltered housing schemes with live in wardens plus a range of other properties specifically designated for older people with a peripatetic warden service. The buildings were developed in the 1960s and 70s and were experiencing difficulties with lettings and rising repair costs. Several of the schemes were isolated from local facilities and services. There were difficulties in recruiting staff to live on site and the costs of their support service were higher than those of other providers.

Shoreline engaged PFA to review their sheltered housing service – the nature and future of their support services and the fitness for purpose of the buildings. This work was based around the PFA survey tools, alongside structured scheme visits and discussions with staff and residents set within the

context of the local and national policy agenda.

An Options Appraisal was used to inform discussions with the local authority including the Supporting People team and the Shoreline Board. Actions included appointing a Head of Service to take responsibility for older people's housing and support services, take forward the findings from the review, move towards a non-residential service following extensive resident consultation and discussions with the local authority. A further outcome was an agreement with social services for a small number of schemes to become extra care with some minimal building work and an on site care team.

# Case study 2

## Sedgefield Borough Council

Sedgefield Borough Council in County Durham has retained their housing, including thirteen purpose built sheltered housing schemes. The Borough commissioned PFA to carry out a review of the housing service and the schemes in order to develop a long term strategy for their future. Similar to Shoreline, some of the schemes were experiencing difficulties with letting, increasing repair costs, including work required to bring them up to Decent Homes standards, and difficulties carrying out works with very frail residents in situ. A significant number of properties were bedsits and small one bedroom flats.

The Borough Council was also concerned about the future requirement to shift away from pooled services to a scheme specific service charge and the impact this would have on letting, together with proposed changes to Supporting People funding for sheltered housing services.

Using the survey tools, together with discussions with housing

and maintenance staff, wardens and residents, an Options Appraisal report was agreed. The report included a number of good practice examples from other commissions to improve lettings and reduce voids. It was also used as the basis for discussions with social care and health to improve joint working between the integrated teams and lettings staff, to ensure that older people, who might otherwise consider residential care their only option, were informed about sheltered housing.

The report provided the Borough with key data for each of the thirteen schemes. Alongside an existing asset management strategy, it has enabled the Borough to improve housing management performance, prioritise investment and inform strategic decisions.

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If you would like to discuss these options further and learn how you can obtain the Northern Housing Consortium discount against the normal cost of these services, please contact:

**Charlotte Harrison**, Executive Director  
(Policy and Public Affairs)

### **Northern Housing Consortium**

Webster's Ropery  
Ropery Road  
Deptford Terrace  
Deptford  
Sunderland  
Tyne & Wear  
SR4 6DJ

Tel: 0191 566 1000  
Fax: 0191 566 1001

[www.northern-consortium.org.uk](http://www.northern-consortium.org.uk)  
[enquiries@northern-consortium.org.uk](mailto:enquiries@northern-consortium.org.uk)

If you wish to discuss in more detail how the consultancy and support from Peter Fletcher Associates can help you, please contact:

**Avis Duncan**

### **Peter Fletcher Associates Ltd.**

Chesterwood Grange  
Hexham  
Northumberland  
NE47 6HW

Tel: 01434 684944

[info@peterfletcherassociates.co.uk](mailto:info@peterfletcherassociates.co.uk)  
[www.peterfletcherassociates.co.uk](http://www.peterfletcherassociates.co.uk)