

Taunton Deane Borough Council

Tenant Services Management Board – 20 February 2017

Supported Housing Property Options Review

This matter is the responsibility of Executive Councillor Terry Beale, Portfolio Holder for Housing

Report Author: Tim Child, Asset Manager and Jan Errington, Project Manager

1. Executive Summary / Purpose of the Report

- 1.1 This report presents the findings from a review of our sheltered and extra care properties and the development of a new aspirational property standard, providing information on stock performance and condition. It sets out our proposed approach to stock rationalisation, options appraisal and importantly how we can achieve the key elements of the standard incrementally over the 30 year business plan. This forms the basis for ongoing work to refine planned investment in our supported housing stock in the future.

2. Recommendations

- 2.1 TSMB note the Council's new approach to smarter use of its stock to make it fit for purpose in the future for older people through stock rationalisation and ensuring that suitable components used for sheltered and extra care housing are fitted in a way appropriate to the needs of vulnerable older people. This new approach is consistent with the Asset Strategy principles agreed through the Business Plan Review in 2016.
- 2.2 Recommend to Community Scrutiny the standard as an aspirational standard to be implemented as and when affordable focusing on the attributes as prioritised.

3. Risk Assessment (if appropriate)

Risk Matrix

Description	Likelihood	Impact	Overall
Assumptions made based on limited data about properties. This will be mitigated through surveys undertaken on areas identified as high risk in terms of cost and specific requirement	4	2	8
Raised expectations of tenants based on new aspirational standard may present new challenges. This will be mitigated by clear communications about the time and funding constraints of working towards the aspirational standard over 30 years	4	2	8
Difficulty in forecasting stock rationalisation through properties becoming void leading to delays, disappointment and complaints and potentially loss of properties targeted to swap into sheltered to the right to buy. Extreme cases will be picked up in the annual review of the capital programme and rationalisation plan and dealt with on a case by case basis to avoid any long term discrimination. General needs tenants in stock which is due to transfer to sheltered will be offered the opportunity to transfer now if they need the sheltered service.	4	2	8
Some properties will never reach the standard but there may be limited alternative opportunities. Many will still be suitable for those with lower needs and others will be dealt with through options appraisal and may ultimately be redesignated as general needs where other options are not suitable. A review of the sheltered allocations policy may also provide options for some properties.	4	2	8
The standard may become out of date over time. To mitigate this the capital programme and rationalisation plan will be reviewed annually and the standard every 3 years.	3	2	6
Risk of welfare reform impacting on income and future demand. This is mitigated by low number of units affected and customers may choose to pay extra for location and size, particularly if we market to those downsizing. Further stock rationalisation may also help to mitigate the issue.	4	2	8

Risk Scoring Matrix

Likelihood	5	Almost Certain	Low (5)	Medium (10)	High (15)	Very High (20)	Very High (25)
	4	Likely	Low (4)	Medium (8)	Medium (12)	High (16)	Very High (20)
	3	Possible	Low (3)	Low (6)	Medium (9)	Medium (12)	High (15)
	2	Unlikely	Low (2)	Low (4)	Low (6)	Medium (8)	Medium (10)
	1	Rare	Low (1)	Low (2)	Low (3)	Low (4)	Low (5)
			1	2	3	4	5
			Negligible	Minor	Moderate	Major	Catastrophic
			Impact				

Likelihood of risk occurring	Indicator	Description (chance of occurrence)
1. Very Unlikely	May occur in exceptional circumstances	< 10%
2. Slight	Is unlikely to, but could occur at some time	10 – 25%
3. Feasible	Fairly likely to occur at same time	25 – 50%
4. Likely	Likely to occur within the next 1-2 years, or occurs occasionally	50 – 75%
5. Very Likely	Regular occurrence (daily / weekly / monthly)	> 75%

4. Background and Full details of the Report

4.1 Strategic Context:

- 4.1.1 A range of factors led the Council to undertake a review of its supported housing stock and services (supported housing in Taunton Deane refers to sheltered and extra care housing). For a number of reasons, emerging needs and consumer expectations demands more flexible property for older people which can continue to be a suitable home for tenants who will live longer with increasing frailty, poorer health with more complex medical problems and disabilities including poor mobility.
- 4.1.2 Over the next 20 years the over 65 population of Taunton Deane is set to increase by over 27%. In the South West we live longer than the national average but not healthier in our older years Therefore, the health, care and support needs of our older population are also predicted to increase and Sheltered and extra care housing will be in demand.
- 4.1.3 Overall demand is predicted to remain relatively stable in the context of an increasingly older local population who are more discerning, have more choices in their future supported housing options than previously. The Council has traditionally provided services predominantly to those most in need and disadvantaged. Current lettings trends indicate that demand will continue to come from this group and increasingly so.
- 4.1.4 The external landscape is changing with the advent of the Care Act enabling better informed customers, greater choice, and greater empowerment in relation to their care

and support. The development of guidance on standards for older people's housing along with the review and improvement of housing stock by many landlords over recent years is also influencing national expectations. Many landlords are developing higher end products with mixed tenure which are attractive to older customers who can afford to choose.

- 4.1.5 Uncertainties around emerging welfare reform mean that we need to be aware of potential income loss. Under the new funding regime from April 2019, we do not know for certain yet whether Sheltered and extra care housing will continue to enjoy the protection for the additional cost within its service charges for providing intensive housing management and that older people will not be penalised for under-occupying. Albeit in relatively small numbers, this could affect tenants and customers unable to afford 2 bed properties or higher priced schemes, changing lettings trends and our views on which stock to keep as sheltered housing or swap out. Current indicators of assurance from government do not provide the clarity we need or a cast iron guarantee.
- 4.1.6 All of these factors influence the housing choices customers will make in the future with a trend towards better standards and more flexible accommodation to meet longer term needs. It is therefore more important than ever that we plan to make Taunton Deane's sheltered and extra care provision future ready. These factors are addressed in Savills' report in detail at 2 and 4.1 and 3.2.3

4.2 Supported Housing Property Options Review:

- 4.2.1 In 2015 the Council undertook a review of supported housing in response to the changing environment and the need to make sure we are providing the right service and suitable accommodation in the future. The aims of the review were to:
- Achieve and maintain a high level of tenant satisfaction
 - Provide housing that is attractive to older people to want to move in
 - Meet the local demand for people over 60
 - Support people to maintain their independence and social networks of family and friends.

The Council recognised that it is essential that the buildings themselves are fit for purpose, are somewhere that tenants will want to live, meet their needs and are financially sustainable.

- 4.2.2 Therefore as part of the overall Supported Housing review, a supported housing property options review was initiated to enable informed decisions about how the Council can invest in its properties over the next 30 years to ensure the properties meet the needs of older people and are in good condition. This will influence the way that the council maintains, improves and develops sheltered and extra care properties in future.
- 4.2.2 A range of activities helped to build the property review and enable decisions on future investment in the stock. Work undertaken by officers' dovetails with work commissioned from Savills to provide an informative and fuller picture of our sheltered stock and the ways in which we can improve it to make it fit for the future. Savills report can be found at appendix A.

The review considered:

- Future demand for the properties
- Condition through Savills stock condition survey
- Development of a new Supported Housing Property Standard
- Appraisal of properties against the Standard
- Stock performance (through Savills analysis)
- Investment required to meet the Standard
- How we prioritise works over the 30 year plan
- Smarter Solutions
- Options Appraisal of the 5 lowest performing schemes

4.2.3 Savills' objectives were:

- Give a solid understanding of the financial and social performance of the sheltered housing stock, and of the consequent viability of provision
- Develop an aspirational best practice standard for physical features of sheltered housing, and assess the feasibility of adopting it
- Appraise options for stock that either does not perform well against the council's financial, social or physical expectations or presents development opportunities.

Surveys undertaken by Savills in conjunction with appraisals against a new property standard and social sustainability analysis, property income and expenditure helped to build a financial performance analysis of the properties.

4.3 Stock Profile & Performance

4.3.1 Stock Profile

The Council's sheltered housing stock includes 980 dwellings comprising 586 flats and 394 bungalows. Further detail can be found in appendix 1 of the Savills report. Almost 50% of the flats are 1st floor without lift access and therefore not suitable for elderly people with mobility needs.

4.4 Stock Condition

- 4.4.1 The properties were included in the stock condition survey undertaken by Savills in early 2016 covering 50% of homes and 100% of communal spaces. Figures were cloned to cover anticipated renewal costs across the whole supported housing stock portfolio. The total investment need of the sheltered housing stock over the next 30 years is estimated at £26.3m (excluding inflation). This does not include all attributes within the standard some elements of which will require additional funding. This is dealt with later in section 6.

4.4.2 The average 30 year future investment need per unit for the sheltered housing stock is estimated at £26,884 which is lower than the overall stock average of nearly £33,000 per dwelling which is inflated as it reflects the high investment need of non traditional general needs stock. Given the knowledge of changing demand, changing local provision, and work carried out to assess performance against the Taunton Deane standard, the gap does prompt a question as to whether additional expenditure on the sheltered stock could be beneficial to ensure the properties continue to meet the aspirations of residents now and in the future thus securing future demand and income streams whilst meeting our aim to support the most vulnerable.

4.4.3 The survey indicates that generally the sheltered housing properties are in fair condition with evidence of past capital investment in key building components. That said, the overall provision of general amenities is relatively basic and a majority of schemes would benefit from attention to address the following:

- Poor access due to badly maintained paths, thresholds in doorways and types of door, stairs and steps, baths, positioning of fittings such as shower controls, spy holes, door entry systems
- Common areas requiring redecoration to make them bright and welcoming
- No dementia friendly signage or colour schemes
- Limited lift access to upper floor flats
- No scheme Wi-Fi availability for tenants
- Bin stores with poor accessibility
- Limited security sensor lighting

The stock condition for the most part does not significantly adversely affect the financial or social performance of the properties.

4.5 Financial Performance

4.5.1 The average Net Present Value (NPV) of the 30 year operating cash flows for sheltered stock is £14,267, which is 13% lower than the average for the whole stock. This is driven by low rents associated with supported housing stock, and in some cases high void levels. There are some strong performers, predominantly bungalows.

4.5.2 Flats perform more poorly than bungalows financially in the majority of cases. Poor performance is driven predominantly by low rents. There can also be an issue of higher than average void loss. In Savills' report appendix 1 Table 7: Scheme Breakdown by Neighbourhood and Property Types provides a breakdown by scheme of financial performance. You will see that the schemes are ordered with the poorest financial performer 1st.

4.6 Non Financial Performance

- 4.6.1 Each scheme was also included in the non financial / social sustainability analysis carried out for the whole stock. Whilst the indicators are not specific to sheltered housing, they contain many factors relevant to the future sustainability of the sheltered portfolio. Low scores are driven by high levels of deprivation generally in the community, as well as low demand/ high turnover, low levels of resident satisfaction and in some cases high levels of complaints relating to noise and environmental issues. This is illustrated throughout section 3 of Savills' report.
- 4.6.2 Those schemes scoring lowest in the financial evaluation tend to be flatted schemes including Lyngford Road / Place, Broomfield House, Warwick Road / Slapes Close in North Taunton, and Moorland Place and Monmouth Road, South Road/ Tauntfield Close at Halcon. The social sustainability evaluation mirrors this picture with Moorland Place and Lyngford Road / Place scoring lowest.

5. Options (for All Schemes)

5.1 Stock Rationalisation:

- 5.1.1 The Council has the opportunity to improve the sheltered housing stock profile in line with key aspects of the new supported housing standard through stock rationalisation. What we mean by this is redesignating identified ground floor properties that are more suited to older people as sheltered accommodation and redesignating sheltered accommodation that is not fit for purpose or cost effective to remodel as general needs. In other words swapping properties out.

To this end, a stock rationalisation plan has been developed. Rationalisation will reduce the overall amount of investment required on approximately 62 of the most unsuitable sheltered units.

- 5.1.2 The rationalisation plan was developed by a working group of colleagues from Supported Housing, Lettings and Business Support with expert advice from the Somerset West Private sector Housing Partnership's Senior Technical Grants Officer and Occupational Therapist (for Disabled Facilities Grant), sheltered housing colleagues and Housing Services Lead.
- 5.1.3 Care has been taken to maintain a balance with the number of one bed ground floor units available in general needs for younger people with disabilities and to identify properties already adapted. The aim is to improve the sheltered housing stock profile whilst maintaining approximate numbers of units.

Rationalisation Plan Summary:

Current Planned Stock Swaps	Units
Sheltered swap outs to general needs	60
Swap in suitable properties to sheltered	63
Overall Sheltered Changes	3

Further potential opportunities for swap outs have been identified and are being explored.

- 5.1.4 The over-riding principle is that redesignation will be actioned at relet which means this is a long-term plan to rationalise the stock through voids over time. The exception to this will be where a general needs tenant in a target property identifies a need for the sheltered service and is happy to accept the charges for the Deane Helpline and baseline sheltered service. We will action this as soon as the tenant has been assessed and agrees to the change to sheltered accommodation.
- 5.1.5 Alongside options appraisals undertaken by Savills of 5 schemes, there needs to be further investigation and possible full options appraisal of schemes scoring below 50% in the appraisal against the standard prior to any investment decisions being made. Details of schemes requiring options appraisal and stock rationalisation are provided at appendix C within a matrix setting out direction of travel for each scheme.
- 5.1.6 For the purpose of surveys and appraisals, schemes have been grouped by location creating mixed property type groups. It's worth noting that some schemes may be generating an options appraisal requirement for the whole asset group affecting stronger schemes within that group. An assessment will be made before undertaking options appraisal as to whether the appraisal needs to include the entire group or specific schemes within the group.

5.2 Options Appraisals

- 5.2.1 To address poor financial and social performance of assets, reduce long term pressure on the business plan and free up financial capacity to invest in more sustainable existing stock, schemes were identified for options appraisals based on:

- Schemes which score poorly against the new Standard and could not reasonably be bought up to standard. In many instances these were also schemes with a poor NPV.
- Schemes where opportunities were thought to exist to expand and improve land use.

5.2.2 Development Potential

5 schemes were selected using the above criteria. Whilst all of those 5 sites have some development potential, the values are relatively marginal and the appraisals show negative land values resulting from high build costs and low rental / capital end values. Using less cautious assumptions might generate options but still likely to be quite marginal. No particular opportunities have been identified.

5.2.3 Investment Potential

More central sites have some investment potential given their location and existence of an alternative rental market. Further work is required in this respect.

6. Development of Taunton Deane's Supported Housing Property Standard

- 6.1.1 An aspirational supported housing property standard has been developed through a colleague working group in consultation with tenant groups. The standard covers the key elements of internal, external and communal areas in relation to accessibility, condition, security, location and proximity to amenities. The aspirational standard is included in Savills' report at appendix 3 with further details on the background and development of the standard at section 4 of the report.
- 6.1.2 Membership of the working group captured a wide range of knowledge and skills relevant to the task. The standard incorporates feedback received combined with national guidance and good practice for older persons housing. Savills acted as a critical friend to sense check the development of the standard.
- 6.1.3 The standard reflects the national concerns of older people and particularly those of our tenants. The top tenant priority was access to properties with accessible and older people friendly fixtures and fittings. This helps to ensure our properties are flexible to meet changing needs and declining health. The standard for new build is higher than that for existing properties and there are some differences between extra care and sheltered housing.
- 6.1.4 In order for the Council to make informed decisions about how much of the aspirational standard is affordable and when and how it can be implemented, further costing and analysis was undertaken.
- 6.1.5 Schemes were scored against the standard by a project team who were familiar with the schemes, providing us with an indication of the extent to which the schemes meet the standard. For this purpose schemes were in asset groups appraised against grouped attributes from the standard. The best and worst performing schemes are highlighted in Savills' report, section 4.3, picking out the commonly occurring themes which do not meet the standard.
- 6.1.6 Our aim is to achieve the aspirational standard in the future in a way that is realistic, affordable and achievable for the Council. This will require a smart approach to the planned maintenance programme over the course of the 30 year business plan to mitigate financial impact. Clearly the council cannot afford to invest in sheltered stock wholesale to meet the whole standard in the short term, however, there are ways of working smarter, ensuring we use the right components, positioning them appropriately at the time they need to be replaced. In this way any additional cost will be minimised and it would only be the additional cost not funded through the business plan which would need to be addressed. We have taken a measured approach, prioritising the attributes and the properties that will be addressed first.
- 6.1.7 The scheme appraisals informed an indicative costing exercise to help TDBC to make decisions about which elements of the standard it can afford to adopt and how and when this can be implemented.

6.2 Costing the Standard

- 6.2.1 Colleagues from Asset Management and Finance collaborated to develop indicative costs using Savills' appraisal of schemes against the standard and their lifecycle unit costs. Further analysis excluded additional costs for planned work agreed within the 30 year business plan, work already in the capital programme and other budgets for 2016-17, schemes identified for stock rationalisation and one scheme which has been identified as requiring a full options appraisal.
- 6.2.2 With an estimated total indicative unfunded investment cost of £1,964,013 to bring existing supported housing stock up to the aspirational standard where feasible, clearly TDBC would be unable to afford to invest in the full standard and needed to prioritise what parts of the standard it can achieve how and when.
- 6.2.3 To take the standard forward, workshops were held with key colleagues across the Housing and Communities directorate to agree principles and potential solutions:
- Terry May – Assistant Director Property and Development
 - Rich Prewer – Property Services Manager
 - Rich Wiseman – Property Investment Manager
 - Jan Errington – Project Manager
 - Adam Grant - Asset Management Surveyor (reporting to Tim Child)
 - Gary Kingman – Senior Supported Housing Development Officer
 - Stephen Boland – Housing Services Lead
 - Lucy clothier – Senior Finance Officer

Jo Humble provided input from Development and Tim Child provided the Asset Management perspective.

- 6.2.4 The workshops addressed the following principles:
- Prioritising key elements in the standard
 - Highest priority elements
 - Non-optional elements
 - Urgent Health and Safety improvements
 - High priority properties
 - Lower priority element to be addressed should the finance become available in future
 - Which elements are not affordable and not a priority
 - Better use of existing stock
 - Smarter ways of working to get the right standard through voids and programmed maintenance works

- 6.2.5 Bringing together key managers, the workshops delivered positive outcomes about how we can work towards achieving the standard with full agreement about better ways of working in the future. All colleagues involved supported the standard and are committed to achieving as much of the standard as possible, within affordability parameters. This means that affordable improvements can take place at the point in time the council would be undertaking planned maintenance (cyclical decoration and capital replacement programmes) or replacements when needed through voids or responsive repairs work.

6.3 The Standard Workshops

6.3.1 Colleagues agreed that we will work smarter in future to achieve the best we can for our sheltered and extra care tenants in the following ways:

6.3.2 Principles agreed in the workshops:

A range of detailed principles were identified, some of the key principles are illustrated below:

- Existing schemes do not have to meet all of the standard to be viable in the future. As long as the buildings are good quality and can be maintained within reasonable costs, a scheme may still be the right choice for over sixties with lower needs. Each scheme should be looked at as a whole with the range of elements from the standard considered in the balance of its functionality, accessibility, location, proximity to amenities and services.
- We make sure that when replacements are made and repairs undertaken we use components friendly to older people and in keeping with the standard wherever possible, for example, lighter composite doors, longer levered handles for doors and windows.
- We make sure that when we undertake any replacements or repairs we consider the placement and fitting of components to make them more accessible for older people, i.e. not too low or too high
- Properties with significant challenges in relation to the standard will be reviewed on a case by case basis with relevant managers in Housing Services, Asset Management and Property Services. Accessibility is the most likely reason for this.
- Further more detailed surveys may be required to ascertain the extent and actual cost of work in advance for some additional work to meet a high priority element within the standard; for example, work to ensure that paths to individual properties and communal facilities are accessible will require surveying prior to any refocus of the planned programme.
- Internal and external access issues for tenants who are disabled and qualify for help will be dealt with by the Disabled Facilities Grant (DFG), for example, where a ramp is needed to overcome steps, grab rails etc.
- Within Extra Care Housing, transfers to ground floor accommodation are prioritised where a tenant's mobility and /or sight have deteriorated to the point where they will no longer be able to manage the stairs. Sheltered allocations policy will be picked up by a wider review of the customer landlord strategy in line with the Business Plan.

6.4 Prioritising attributes within the standard:

6.4.1 Colleagues agreed which categories within the standard should be high, medium or low priority and which could not be addressed and would not be taken forward. Tenants' views on priority were taken into consideration.

6.4.2 We also identified works that are already within the scope of the 30 year capital programme and other maintenance budgets along with works needed for statutory compliance with health and safety requirements and fire regulation. Some work of

lower priority which will be beneficial can be done within existing budget plans with minimal extra cost because it's about the way we do the work.

6.4.3 Tenants are particularly concerned with accessibility issues and health and safety in tune with tenants' top priorities nationally. For example, a suited lock system was deemed urgent and high priority to reduce risk to tenants where access is needed for emergency medical staff (managed through the Deane Helpline Control Centre for sheltered and together with scheme managers in Extra Care Housing). This will bring assurance for tenants and their families as well reducing the risks in medical emergencies. The system will also create financial efficiencies over time as significantly less hardware is needed in relation to relets and replacements every year once it's in place. In turn this frees up resource to contribute to other priorities within the supported housing standard.

6.4.4 Essential and priority elements within the standard that are accounted for within the capital programme and existing budgets include the following:

Category in Standard	Budget
Wind and weather tight	Pre-planned maintenance programme (PPM) and capital programme
Meeting Halls	Existing budget to cover essential improvements for health and safety and DDA compliance and ongoing maintenance
Scooter Storage	Existing development budget for pilot scheme
Kitchens	Capital programme
Bathrooms	Capital Programme
Health and safety regulatory statutory compliance	Capital Programme
Windows	Capital Programme
Doors	Capital Programme
Heating	Capital Programme
Aids and adaptations	Budgeted within HRA business plan
Telecare	Budgeted within HRA business plan

6.4.5 Achieving the standard without additional funds to meet all priorities is a long term but worthwhile objective. Based on Savills surveys, overall replacements required are set within the 30 year business plan. We propose to deal with exceptions on a case by case basis that are either (a) not picked up within existing programmes or (b) where the issue is more severe/ urgent, DFG is not applicable and the current planned cycle is too far away. A summary of scheduled replacements is provided at appendix B.

6.4.6 Schemes identified as needing urgent improvement:

Extra care housing provides homes for our most vulnerable tenants and was significantly in need of improvement. In the last 2 years we have updated the schemes through investment in individual and communal assisted bathrooms, refurbished the

lifts at Kilkenny, improved the décor and floor coverings in the meeting halls, and some general refurbishment including works to meet fire regulations. We have upgraded the community alarm systems and are half way through providing adequate scooter storage and bin storage. Kilkenny requires further works to be fully compliant with fire regulation and this has to happen by April. Kilkenny also needs further investment to replace its 30 + year old floor coverings in the communal corridors which are badly worn.

6.4.7 Elements within the standard that are not already accounted for within the capital programme and existing budgets are prioritised as follows:

Category in Standard	Priority
	H/M/L
Access (paths where preventing access to properties)	H
Access (doors/thresholds/steps)	H
Accessibility (useable components/positioning)	M
Orientation (colour/contrast/signage)	L
Bin Storage (where this is missing or extremely poor)	L
Health and Safety/ lighting etc (where there is a risk)	L
External landscaping	L
Communal flooring	L
Health and safety /Suited Locks	H Urgent
Block entrance flooring	L

An exercise was undertaken to rank priorities, however, it was found that a scheme by scheme approach will be more helpful, looking at each scheme's issues in the round, taking account of the principles agreed, dealing with any exceptions on a case management basis.

6.4.8 Elements of the standard not prioritised for existing stock improvement:

- a) Improving parking – this is a recognised issue throughout Taunton Deane. The council is not in a position to invest in better parking across the district. However, where there is a specific hotspot, the area team will need to work with Somerset County Council highways department, tenants and ward councillors to consider what affordable measures can be put in place that would make a genuine difference – for example introduction of permit parking, better signage and road markings, dropped kerbs. Significant maintenance issues on Taunton Deane property related to parking will continue to be picked up the DLO for example protection of existing ambulance bays with road markings.
- b) Electrical sockets - the group considered that this was an area of accessibility that could be managed by tenants with extension leads where needed. The cost of rewiring outweighs the gain when this specific accessibility issue can be overcome by a relatively simple solution.
- c) Guest rooms - are located with meeting halls for tenants' friends or relatives to hire. Our guest rooms are not high quality, not all are accessible and they are

heavily under-utilised. A past review resulted in the closure of all but 5. The remaining guest rooms continue to be under-utilised. It has been recognised that we need to undertake a new review of the use of the remaining guest rooms. This could include changing use for the benefit of the wider community.

6.5 Indicative cost of achieving the standard:

6.5.1 Total broadly indicative cost of capital investment in the business plan is as follows

Total Indicative Costs	£
High Priority items covered within HRA business plan	4,383,658
High priority items (not accounted for by the business plan)	391,059
Medium priority items (not accounted for by the business plan)	140,610
Low priority items	913,750

6.5.2 There remain some areas of priority within the standard that are unfunded currently within the business plan including paths and general access. These will essentially be the improvements that we will need to look at most creatively, for example getting the most out of the review of the Open Spaces contract to deal with the majority of issues with paths, where access to a property is restricted in a way that can't be resolved through existing routes we will consider these exceptions on a case by case basis.

6.6 Adopting the Standard:

6.6.1 The group agreed a common sense achievable approach would be that:

- We adopt the full aspirational standard for new build in as far as development finance is available and the site allows with a minimum of meeting the high priority elements.
- We adopt the priority elements of the standard that can be achieved through the current business plan
- We look for efficiencies and other ways in which we can achieve more of the standard through annual review of the capital programme and business plan
- We look to widen the refit of bathrooms with wet rooms to sheltered housing at such time as the council is able to fund this in the future
- Additional works to bring properties up to the higher supported housing standard are not undertaken on properties that are identified for redesignation to general needs. They will of course benefit from the usual level of responsive repairs and works through the capital programme as normal.

6.6.2 Scheme Plans are being developed to ensure that the resources we have are focused in the most effective way to achieve the aims of the supported housing property options review. A preliminary scheme matrix is attached at CB.

7. Next steps

7.1 There are a number of further measures required to ensure that we build on this work and use this opportunity to make the best use of resources to bring our sheltered and extra care stock closer to the supported housing standard

- 7.2 Surveys will be undertaken where needed to firm up cost for example, paths which are more than just overgrown and are causing access to individual properties or blocks.
- 7.3 Colleagues from Supported Housing and Asset management will refine the scheme matrix in relation to priorities within the supported housing standard and stock rationalisation plan.
- 7.4 Further investigation and possible full options appraisal of schemes scoring below 50% in the appraisal against the standard prior to any investment decisions being made.
- 7.5 The capital programme may need to be refocused to take account of high priorities within existing budget. This will be the essential and high priority items together with exceptions agreed on a case by case basis – for example paths creating significant access and safety issues.
- 7.6 Where costs are excessive and cannot be contained within the capital programme without deprioritising other important works, agreement will be needed by key managers from Asset Management, Property Services and Housing Services.
- Is this essential?
 - Have we considered all ways to resolve the problem?
 - Are there any longer term solutions like swapping out the property?
 - Does it need an options appraisal?
 - If it's essential and this is the best solution how we will fund it within the programme

A framework for future review of properties will be developed.

- 7.7 Other workstreams within the HRA business plan will take forward work in optimising how we use our disabled facilities grant to adapt properties to meet tenants' needs with a view to making the best use of existing adapted properties and identifying the best properties suitable for future adaptation.
- 7.8 Other workstreams within the HRA business plan will explore the sheltered housing lettings policy to consider whether we are able to facilitate access to ground floor accommodation where tenants' needs have changed in relation to their mobility and/or sight.
- 7.9 Further work is planned to consider how the standard is incorporated into the voids works procedures and lettable standard.
- 7.10 The sheltered rationalisation plan will be actioned so that properties are relet with the correct new designation.
- 7.11 We will undertake an annual review of:
- lettings and demand trends and stock rationalisation plan taking into account emerging reform of supported housing funding and welfare benefits
 - Priorities for schemes and attributes within the supported housing standard.
 - Capital programme informed by the above

8. Links to Corporate Aims / Priorities

8.1 The supported housing property review links to corporate aims in a number of ways:

8.2 **Corporate Aim:** A vibrant social, cultural and leisure environment - work with partners to improve the lives of our most vulnerable households

8.3 **Housing Revenue Account (HRA) Business Plan Objectives:**

Tackling deprivation and sustainable community development - exploring alternative service delivery options outcome:

- **Providing Quality Homes**

This means we are committed to investing in our existing homes to deliver good quality of life for residents and value for the money spent, and to developing new homes that meet local needs.

- **Supporting the most vulnerable**

This means we are committed to letting homes to people who have the fewest housing options, and will provide additional support that helps people who are older, disabled, or socially excluded to live comfortably in their council-owned home.

9. Finance / Resource Implications

9.1 This report is not a request for additional resources. The property standard is aspirational and although any new properties would be built to this standard, existing properties will be upgraded gradually, over time. This will be done using existing resources, prioritising these works within the capital and maintenance programmes, where possible.

10. Legal Implications

10.1 There are no direct legal implications arising from this report, however, legal support will be sought where options appraisals lead to any developments requiring legal advice.

11. Environmental Impact Implications

11.1 Not applicable. Any subsequent decision on any development scheme would be the subject of a site specific environmental impact assessment.

12. Safeguarding and/or Community Safety Implications

- 12.1 Community safety is incorporated in the strategic priorities for Housing and Community Services. A better understanding of our supported housing stock combined with a clear direction of travel and plan to work towards the supported housing standard will housing services and support for these disadvantaged communities.

13. Equality and Diversity Implications

- 13.1 An Equalities impact assessment is attached at appendix D. There are no adverse impacts for the district's older people as a consequence of working towards stock improvement to create better access and more suitable accommodation. (Conversely to not work towards the aims of this project would be detrimental in terms of failing to enable access to older frailer tenants and older tenants with disabilities).

14. Social Value Implications

- 14.1 Supported housing plays an important part in directly helping our most vulnerable tenants their independence and wellbeing and helps their families feel assured. This in itself is big contributor of social value within the district.
- 14.2 Our meeting halls and service also contribute to a sense of community providing opportunities for social activities for health and wellbeing, reducing potential isolation and loneliness and bringing communities together.
- 14.3 A fundamental part of enabling supported housing to contribute to social value is ensuring over time that our supported housing and meeting hall stock is physically fit for purpose, suitable and for vulnerable older people and flexible to meet their future needs along with lettings policies that support this aim.

15. Partnership Implications

- 15.1 There are no direct partnership implications; however, potential future development arising from options appraisals may provide opportunity for further partnership working and the provision of properties more suitable for vulnerable older people will also help the Council to contribute positively to local health and wellbeing partnership working with health and social care agencies.

16. Health and Wellbeing Implications

- 16.1 The supported housing property options review links to the health and wellbeing agenda in terms of meeting the increasing health and wellbeing needs of Council tenants through the provision of sheltered and extra care housing of good quality fit for purpose to meet current and future needs.
- a) Suitable properties accessible and flexible to tenants' future needs
 - b) Enabling a safe environment for our most vulnerable tenants
 - c) Enabling an environment that helps older people and those with mental health and physical disabilities to live as independently as possible for as long as possible
- 16.2 The Council has an enhanced duty under the Care Act to work together with other agencies to ensure the safety of vulnerable individuals through services that are 'person

centred' 'outcomes focused' and meet individual needs. We need to work with local partners to help reduce preventable health issues and link to the wider local health aims. Providing flexible accommodation fit for purpose helps us to contribute positively to these aims.

17. Asset Management Implications

17.1 This is an asset management focused report and as such implications have been covered within the report.

18. Consultation Implications

18.1 Tenants have been consulted on the development of the aspirational standard for supported housing through the Supported Housing Development Group and the Tenants' Forum.

Democratic Path:

- **Tenant Service Management Board**
- **Scrutiny / Corporate Governance or Audit Committees – Yes /** (delete as appropriate)
- **Cabinet/Executive – Yes / No** (delete as appropriate)

Reporting Frequency : ☒ Once only ☐ Ad-hoc ☐ Quarterly
☐ Twice-yearly ☐ Annually

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Appendix B	Key Replacements schedule
Appendix C	Preliminary Scheme Matrix (<i>Confidential</i>)
Appendix D	Equalities Impact Assessment

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Supported Housing Review

A review of the Council's sheltered and extra care housing

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1. Introduction

1.1. Review Scope

This review of Taunton Deane's sheltered housing stock has been conducted to inform development of the Council's future sheltered housing strategy. It has primarily considered matters relating to the physical stock i.e. not the revenue-funded services, and has covered:

- Physical standards that would ideally be met by all the Council's sheltered housing
- The financial viability of the current stock and its capacity to contribute to identified needs now and in the future
- Future options for underperforming stock, in terms of how different approaches could contribute to addressing identified challenges and meeting needs and aspirations.

It has taken place alongside work to establish a model of service that would be resilient to changes in revenue funding for the support provided to residents living in the properties, and takes this service model into account.

The review concludes with recommendations for a strategic approach to sheltered housing strategy that would ensure provision of housing for older people aligned with local need, deliver solid financial performance, work towards an achievable best practice standard, ensure the physical characteristics of properties meet the aspirations of residents, and support the council's wider social objectives.

1.2. Objectives

The primary aim of the review was to inform an evidenced strategy for supported housing that would ensure provision of viable and sustainable accommodation that would deliver a good quality of life for older people over the coming years.

The review had three objectives:

- Give a solid understanding of the financial and social performance of the sheltered housing stock, and of the consequent viability of provision
- Develop an aspirational best practice standard for physical features of sheltered housing, and assess the feasibility of adopting it
- Appraise options for stock that either does not perform well against the council's financial, social or physical expectations or presents development opportunities.

1.3. Methodology

The review was conducted between June and September 2016. It included several work streams that enabled the viability and suitability of the service to be considered in the round.

- Desktop evaluation of the strategic context that looked at the national and local environment for delivery of sheltered housing services. It provided a clear picture of national policies for funding new and existing housing for older people; local needs and market trends; and local consumer attitudes which helps to identify pressures and opportunities for the service.

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- Development of an aspirational sheltered housing standard for Taunton Deane by council staff informed by an understanding of tenant priorities and examples of best practice by Savills. It specifies standards for physical design, condition, facilities, and location that would be desirable to potential residents and deliver a good quality of life to people living there.
- Assessment of how each current sheltered housing scheme performs against the aspirational standard.
- Presentation of investment needs identified by the recent stock condition survey which covers all of the Council's Housing Revenue Account property. It shows estimated costs for future investment in major components (e.g. kitchens, roofs) and ongoing compliance (e.g. management of asbestos over the next 30 years). The survey was based on 50% survey of individual areas and 100% survey of communal areas
- Evaluation of the performance of the sheltered stock against a range of social and financial criteria. It considered the financial performance of each scheme over the next 30 years using net present value (NPV) of operating cashflows, and contribution to several of the Council's overall corporate objectives. This performance framework was aligned to that of the whole stock.
- Further review of schemes that perform poorly against financial and social criteria and/or against the sheltered housing standard, where Taunton Deane Borough Council and Savills colleagues agreed that performance cannot easily be improved. It appraises options for alternative uses of these properties or the land they stand on, with a view to ensuring appropriate levels of provision of quality sheltered, supported and general needs housing for the Borough.

1.4. Glossary of terms

A number of acronyms are used as shorthand in this report. Each is stated in full the first time it is used. The main terms used are listed here.

SCS	Stock Condition Survey	An assessment to identify the future investment needs of properties
NPV	Net Present Value	A calculation of the value of the revenue from a property's rental income over 30 years, after costs are taken into account
LHA	Local Housing Allowance	The mechanism for paying housing benefit for private rented tenancies
JSNA	Joint Strategic Needs Assessment	An assessment of the current and future health and care needs of local populations
ACORN	A Classification of Residential Neighbourhoods	A lifestyle classification developed by CACI and used by marketing professionals, statistical researchers and social and lifestyle commentators

2. Strategic context

In order to consider the strategic context for older persons' housing in Taunton Deane we have conducted a desktop review of national and local matters that are likely to have a bearing on provision and demand. This has included national policy, local priorities, assessed local need and consumer attitudes, and identification of existing local provision.

2.1. National policy and context

People may live for 20-30 years as a retired person, over which time their requirements can change considerably. The need for specialist provision is growing because the number of very elderly people and people living with dementia is increasing, as is the length of time people live with life-limiting conditions. The practical, financial, and aspirational aspects of these facts are a key driver of national policy and professional practice.

Priorities for older people's housing

Much of the national agenda for older people's housing relates to reducing the pressures of an ageing population on publicly funded health and care services by aligning funding and coordinating activities across local government, social care provision and NHS services. The **Care Act 2014** embeds these approaches and places specific duties on councils, and the **Health and Housing Memorandum of Understanding** seeks to shift professional practice to improve integration between health, housing and social services. The desire to reduce pressure on the NHS means preferred services driven by frameworks such as the **Better Care Fund** are about reducing falls or 'reablement' after an injury/illness. Similarly, local authorities continue to want housing provision that can keep people out of costly care homes despite the new **Social Care Precept**.

Funding new housing for older people

Government wants its funding for new older people's housing to a) increase ownership, b) fill a gap in mid-market provision and c) diversify the market of providers. The Autumn Statement 2016 saw government move away from its express preference for shared ownership, however little was said about specialist housing and the ongoing pressures on housing and care options for older people. Prospects for social rented sheltered housing do not seem to be at the top of the agenda, and so it seems that schemes will need to be forward looking rather than traditional to attract future funding.

Funding support services

Support providers are becoming accustomed to outcomes-based commissioning, integrated commissioning, and a focus on reduction of acute needs. Providers of low level support have adjusted funding models and sources accordingly. However further welfare reform looks set to impact on revenue funding for supported housing aimed at lower income households.

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Government proposals to cap housing benefit payable to social tenants at the level of the local housing allowance (LHA) has caused great concern amongst supported housing providers. The cap will be implemented for all sheltered housing tenants from April 2019. A mechanism to top up justifiably higher rents and fund support/Intensive Housing Management services will be devised and implemented at the same time as the cap.

Taunton Deane's eligible rents are not higher than the Local Housing Allowance, but Intensive Housing Management charges do take rents over the threshold in some cases. The extra care schemes are particularly exposed. Although it is expected that a funding pot outside of the welfare budget will be available to cover this shortfall, payment does not look set to be guaranteed and so there could be an impact on letability and income collection costs. There is an additional pressure on 2 and 3 bed properties where under-occupying tenants could face an additional shortfall.

Trends and practice

The nature of supported housing provision has changed in recent years, so older people will see a more diverse and more modern 'housing offer'. These are included to illustrate both possible sources of competition with council services and options for adding to, or revising, existing council services.

Extra Care housing has become popular with providers, commissioners and the public in recent years, with a healthy market in private and not-for-profit sector provision. Purpose built schemes offer homes for rent or ownership alongside on-site care services which are flexible to a resident's changing needs, and community/social facilities. The intention is to promote independence and enable people to stay in their home for longer as they age and/or their health deteriorates, therefore avoiding or postponing the need for expensive residential care.

Retirement villages are also growing in number, especially via private providers. They tend to emphasise the communal facilities (restaurants, libraries etc) that are available alongside independent living, and have less focus on provision of care services. The private market for provision of **domiciliary care** has also grown, perhaps due to a combination of people's reluctance to move into specialist provision and also downward pressure on local authorities' ability to fund residential care.

Assistive technologies that support independent living and social interaction are a growing part of accommodation provision for older people. They aim to improve quality of life and prevent admissions to acute services or residential care.

The **hub and spoke** model uses Extra Care and scheme-based sheltered housing as a base for support services which are used both by people who live in the central building and in the locality. It aims to integrate services and improve financial viability of provision.

2.2. Consumer attitudes

In terms of type of provision, public opinion favours protecting housing equity that can be passed onto family members. Consequently older people often prefer to own their home rather than rent it, and this reinforces a general social preference for ownership. It also constrains options for funding accommodation and care services for older people because people are reluctant to release equity from owned property to fund housing suitable for older age.

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Research by the University of York¹ gives a picture of people's housing aspirations. Key findings are that:

- Most people want to stay in their current home for as long as possible
- A change in health, in particular mobility, is most likely to trigger a house move
- Ability to maintain family relationships and access good transport links from a new home are of primary importance
- People resist planning for their future selves, although some can see the need to plan ahead and move when it is still reasonably easy to do so and they have choices over where to go i.e. it is not an urgent move
- People wish to preserve housing equity so relatives can inherit, although there is general support for the idea of equity release to fund housing for older-age
- Knowledge of assistive technologies, Extra Care and Home Care were limited (though perhaps this has changed as the private market has expanded and publicised its offer)
- Sheltered housing is perceived as something for very old or infirm people
- Moving to a care home is widely seen as highly undesirable.

Later reports, including 'Making it work for us', Age UK; 'Last time buyers', Legal and General; 'Silver Chic', Anchor; 'The top of the ladder', Demos; and 'Breaking the Mould', NHF make similar observations on aspirations. 'A better fit', produced by Shelter in 2012, amplifies the University of York findings with findings from a literature review and its own YouGov survey:

- Emotional attachment to a home or neighbourhood is a key factor in people's reluctance to move to cater for their housing needs or aspirations
- Being able to stay comfortable, warm, safe and mobile in the home becomes increasingly important to older people – indeed warmth and outdoor space are the most important design features cited in a potential new home
- Safety/security and proximity to services and family/friends are the factors older people consider most attractive if they were to move
- Around one third of older people would be interested in the idea of retirement housing now or in the future.

At a local level the 2010 Housing and Older People Study for Taunton and South Somerset Housing Market Areas echoes findings of national research, in particular that older people do not plan ahead for their needs and often have to move due to a crisis, but that forward planning may be improved by better information.

In terms of standards, Savills' own experience suggests residents' and potential residents' priorities relating to services and physical attributes tend to be for:

- Accessibility (i.e. level access, suitable for wheelchair users, proximity to services).
- A flexible service that can change with their needs
- Parking availability
- Wi-Fi and TV connectivity

The top two points reflect the known priorities of Taunton Deane's tenants too. Older people's opinions on how they would like to live can inform standards adopted and therefore the attractiveness and effectiveness of any accommodation provided. This is discussed further in section 4.1 below.

¹ Housing choices and aspirations of older people, 2008

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2.3. Local policies, initiatives and pressures

Local policies and reviews

Taunton Deane has recently reviewed its models for funding support in sheltered provision. In consultation with residents, the decision was taken to introduce a level charge for all tenants to fund community-style services, tenancy sustainment, housing options advice and income maximisation services available to all residents. More specialist support for people with higher needs is now provided to individual tenants following assessment, and is funded by County Council grant.

County Council policies and reviews

1. Health and Wellbeing

The 2013-18 Health and Wellbeing Strategy identifies a need to improve the availability and marketing of suitable homes that meet the longer-term needs of older people and enable them to enjoy a more independent life for longer. Catering for people with longer-term illness and dementia is a particular priority; as is better integration of services for older people following a hospital stay to help them remain in their home for as long as possible. Better information is needed on housing options for older people and support for people to meet housing needs in later life. Actions flowing from the strategy included creation of Independent Living Teams, and widening the housing options for achieving and maintaining independent living.

2. Housing strategy

The 2013 Somerset Strategic Housing Framework refers back to this Strategy, and lists as priorities: improving information provision, reviewing sheltered provision, and understanding the impact of the personalisation agenda.

3. Joint Strategic Needs Assessment

Somerset County Council's Joint Strategic Needs Assessment (JSNA) from May 2015 projects an increase in people over 65 from 24,000 in 2013 to 40,000 in 2047. This is a steeper rate of growth than in West Somerset but slightly flatter than South Somerset. The JSNA also presents figures on falls, hospitalisation, tenure, physical activity and dementia for older people in Somerset. For Taunton specifically, the Health and Wellbeing board projects that by 2023 more than 25% of the population will be over 65 in almost all parts of the borough, with further consolidation of this over the following 10 years.

Demographics and supply analysis

1. 2010 Housing and Older People Study²

The study, commissioned by four local authorities, Somerset County Council and Somerset NHS Trust, assessed the housing and support needs of older people living in the Taunton Housing Market Area. It says that Taunton Deane has 41% of the older people in the housing market area, and that nearly 43% of Taunton Deane's households are older person households. The study finds no current need for additional affordable specialist accommodation for older

² Housing and Older People Study, Taunton Housing Market Area; Fordham Research; November 2010

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people in Taunton Deane, although it does find a need in Sedgemoor. It finds that people who need specialist housing in Taunton would generally be unable to afford market provision, but it also finds that there is already sufficient sub-market provision to cater for their needs.

2. ONS population estimates 2016

The ONS has projected that the number of people in Taunton Deane aged over 65 will increase from 24,000 to 40,000 between 2013 and 2037. This is expected to be driven by internal migration.

3. 2016 Analysis of local need

The catchment population for Taunton Deane's sheltered housing in Taunton and Wellington has been analysed using ACORN³.

The population within a 15 minute drive of the centre of Taunton is expected to increase by 6.8% by 2030. Within that, the population aged over 65 is projected to increase by 27.4% (this is an increase of just over 6000 people). The population aged over 80 is projected to increase by 40.9% (nearly 3000 people). The percentage increases for Wellington are very similar, indicating an increase of 3000 people over 65 and 1300 over 80.

Table 1 below presents figures from the Housing in Later Life model for the catchment areas. The model is based on the 2015 population aged 75 years plus within the areas. It suggests the level of need for specialist housing of all tenures for older people and for extra care/enhanced sheltered housing within that total. Specialist housing for older people is accommodation provided with the intention of catering for (single) people who have difficulty with self-care or domestic tasks or who have restricted mobility.

	Total specialist housing requirement		Of which extra care/enhanced sheltered	
	Taunton	Wellington	Taunton	Wellington
Now	2750	1302	712	338
2020	3041	1449	787	375
2030	3833	1831	993	474

Table 1: Levels of need for specialist housing for older people

³ ACORN stands for 'A Classification of Residential Neighbourhoods', and it is a lifestyle classification developed by CACI and used by marketing professionals, statistical researchers and social and lifestyle commentators.

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Table 2 compares total current provision of specialist accommodation with total need.

	Taunton	Wellington
Provision	1241	892
Current assessed need	2750	1302

Table 2: Provision of specialist accommodation compared to total need

Table 3 compares current provision of rented sheltered accommodation with current and future need.

	Taunton	Wellington
Provision	796	558
Current assessed need	651	309
2030 assessed need	907	433

Table 3: Comparison of provision of rented sheltered accommodation with current and future need

In summary, analysis of the current population in the Taunton and Wellington catchment areas indicates that:

- There are around equal numbers of people who would need public support to fund care and people who could self-fund if they required care
- There are high numbers of more affluent households, and these would usually prefer to buy than rent
- There is a clear need for specialist housing for older people, of which around a quarter should be extra care, BUT
- There is an oversupply of rented sheltered accommodation, and if other local providers maintain their level of provision this looks set to endure in Wellington despite increasing need. The attractiveness of the 'offer' made by TDBC properties e.g. location, price, accessibility, will be of particular importance in sustaining future demand in what appears to be a competitive market.

4. Existing and new sheltered housing offer

New sheltered housing developments in and around Taunton include:

- Pegasus Court, 60 1& 2 bed retirement apartments, for ownership only, with communal areas and some support services (shopping, cleaning etc)
- Firepool Lock, 44 1 & 2 bed retirement apartments, for ownership only, with communal areas, house manager, visitor suite and 24 hour call system
- Paul Street, 70 retirement apartments with care and lifestyle services plus 60 bed dementia care home

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- Parmin Close, Taunton, 66 1 & 2 bed extra care housing apartments for rent and shared ownership (Knightstone) with care staff, communal areas, community alarm

The existing sheltered housing rental offer includes:

- Avongrove Court, Taunton, 36 apartments, £825pcm, laundry, guest suite, 24 hour care line, communal areas, house manager
- Dellers Court, Taunton, £695pcm, laundry, guest suite, 24 hour care line, communal areas and activities, house manager
- Bishops Court, Wellington, £650pcm, 47 apartments, laundry, guest suite, 24 hour care line, communal areas, house manager
- St James Court, Taunton (Knightstone), 35 0, 1 & 2 bedroom apartments, part time support worker, community alarm, guest suite, laundry, lounge from £403pcm
- Clifford Ashman Court, Taunton (Housing 21), 27 0 & 1 bedroom apartments, off-site staff, community alarm, guest suite, laundry, lounge
- Elizabeth House, Taunton (Sanctuary) 26 1 bedroom extra care housing apartments, off-site staff, community alarm, guest suite, laundry, lounge

2.4. Conclusions

In summary, there will be a strong ongoing requirement for older person's accommodation in the Taunton area but trends in provision and population mean the need to ensure Taunton Deane Council's sheltered housing is catering for a) aspiration and b) local social care priorities is high. Flexibility to respond to changes in revenue funding will be required alongside any revised approaches to the physical assets.

It is important to note that two separate analyses of need have found there is no current need for additional affordable specialist rented accommodation. The data suggests that whilst there is need for more accommodation to meet the needs of older people in the main population centres of Taunton and Wellington, the emphasis in new provision in the area should be on products for ownership and for more specialist provision. This is a role the council could play alongside other providers should it wish to.

The data also indicates that there may be demand problems for older social rented sheltered accommodation in the immediate future. This may continue in the longer term in some areas, although overall it is likely that increased need will bring pressure on the accommodation provided. There are quite a few new retirement properties coming to market, although the majority are for ownership and appear to be targeting more affluent households. It is feasible to conjecture that demand for the Council's current provision could also be impacted by residents' changing aspirations should new, more desirable, provision arrive in the area. However this all assumes that other current providers of lower cost rented sheltered accommodation do not reduce current levels of provision or restrict lettings to certain groups of people. Officers have pointed out that financially disadvantaged applicants and those with more challenging needs find it more difficult to access other provision, and that local lettings trends continue to make the council's sheltered provision more readily accessible to the current main customer base. This may suggest that Taunton Deane Borough Council's sheltered and Extra Care Housing will continue to be accessed by this group in the future.

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There is a clear need for sheltered housing to support other social care agendas, and an increasing expectation from local professionals that it will do so. To maintain opportunities and reputation, as well as to meet statutory duties, the Council will need to have an eye to the suitability of its sheltered stock for new agendas that are likely to endure beyond changes in political leadership.

Although action has already been taken to put revenue funding for the Council's sheltered service on a sustainable footing, it is likely that central government will change funding models in the next few years in a way that would impact on Taunton Deane Borough Council. Even after development of a new strategic approach to the physical assets, the service will have to be prepared for further reform to work effectively with a new, currently unknown, framework so that it can ensure long term sustainability of the Council's sheltered housing provision.

3. Stock profile and condition

3.1. Overview of portfolio and stock condition

The Council's sheltered housing stock includes 980 dwellings across three neighbourhoods, Halcon, North Taunton and Wellington. The geographical location of properties is illustrated below.

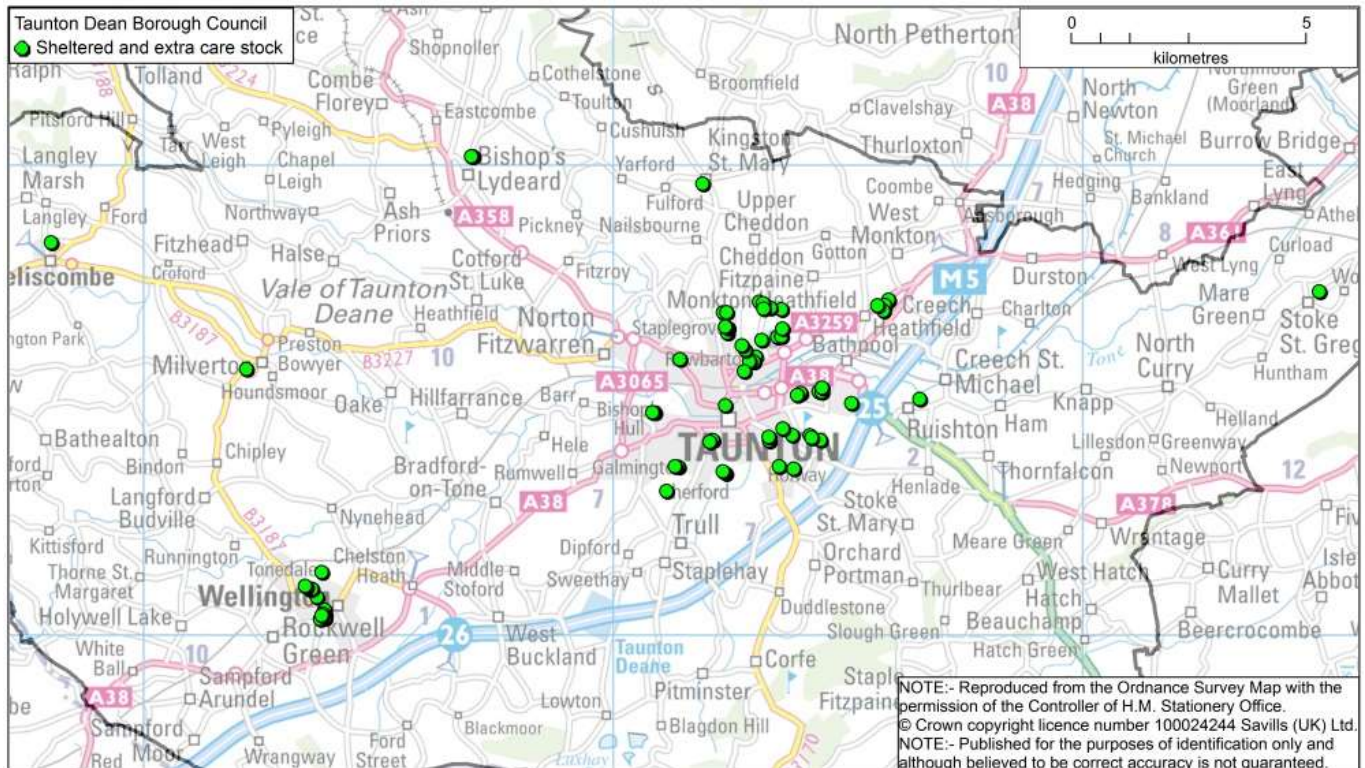


Figure 1: Location of sheltered housing properties

The portfolio is a mix of 586 flats and 394 bungalows. A breakdown by scheme is set out at Appendix 1. Almost 50% of the flats are first floor without lift access resulting in 253 properties (26%) not suitable for elderly people with mobility needs. Many of these properties are beginning to be difficult to let where there are other factors that make the property less attractive to the client group, for example, less favourable location or small flat size. However, central Taunton and Wellington schemes with upstairs flats and stairs continue to be popular.

The properties were included in the recent stock condition survey. The survey covered 50% individual spaces and 100% communal spaces. This provides estimated costs for future investment of major components (e.g. kitchens, bathrooms, windows, doors, roofs) etc. Estimated costs were also included for ongoing management of asbestos based on the age of the dwellings. The total investment need of the properties over the next 30 years is estimated at £26.3m (excluding inflation).

The profile of expenditure need is illustrated below. As with the whole stock, this shows regular peaks of investment need, both in the short, medium and long term. These peaks and troughs occur at broadly similar times in each neighbourhood.

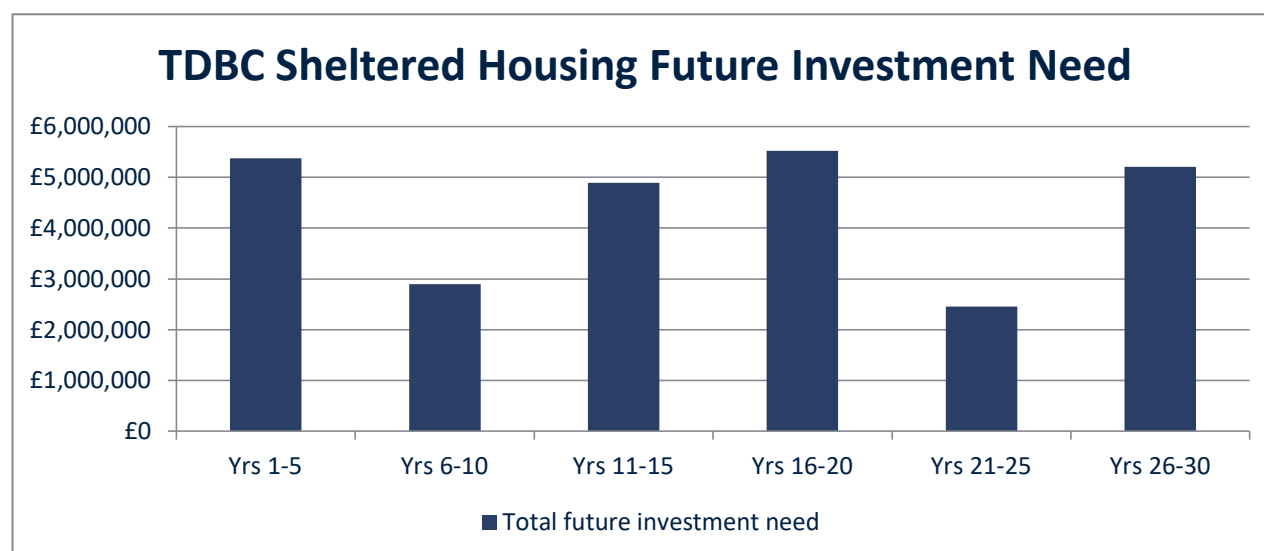


Figure 2: Sheltered Housing Future Investment Need

The average 30 year future investment need per unit of the sheltered housing stock is estimated at £26,884. Across the whole stock, a total of £190m is estimated to be required in the business plan, which represents an overall stock average of nearly £33,000 per dwelling. The overall stock average is high because it reflects the high investment need of non traditional general needs stock. Nevertheless, the gap between assessed per-unit investment need for sheltered and general needs is significant. Given the knowledge of changing demand, changing local provision, and work carried out to assess performance against the Taunton Deane Borough Council standard, the gap does prompt a question as to whether additional expenditure on the sheltered housing stock could be beneficial to fund improvements that would ensure it continues to meet the aspirations of residents now and in the future.

The survey indicates that generally the sheltered housing properties are in overall fair condition, with most building element deterioration being in line with the life expectancy of the elements. There is evidence of past capital investment to the main elements such as kitchens, bathrooms and windows etc. That said, the overall provision of general amenities is relatively basic and a majority of schemes would benefit from attention to address the following

- Poor access due to badly maintained paths, thresholds in doorways and type of door, stairs and steps, baths, positioning of fittings such as shower controls, spy holes, door entry systems
- Common areas requiring redecoration to make them bright and welcoming
- No dementia friendly signage or colour schemes
- Limited lift access to upper floor flats
- No scheme Wi-Fi availability for tenants
- Bin stores with poor accessibility
- Limited security sensor lighting

These issues are reflected in many of the lower scores in the scheme appraisals set out in section 4.3 below. The issue of access was the main issue of fitness for purpose expressed by Taunton Deane tenants and staff, so it has been placed at the top of the list above.

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3.2. Asset performance evaluation

Taunton Deane's asset management strategy is supported by an analysis of the performance of the stock against a range of social and financial criteria. This analysis has included the sheltered housing stock. Financial performance has been assessed using the 30 year net present value (NPV) of operating cashflows. Social performance is assessed against a range of factors linked to the Council's overall corporate objectives, many of which are relevant to sheltered housing, including resident satisfaction, health deprivation, turnover, demand and geographical proximity to key services.

3.2.1. Financial analysis

The 980 sheltered housing properties represent 17% of the total stock of 5,769 rented properties. The NPVs of the cashflows of the sheltered housing properties total £14m, representing 15% of the total of £95m. The average NPV for sheltered stock is £14,267, which is 13% lower than the average for the whole stock. This is driven by low rents associated with this stock, and in some cases high voids.

The range of NPV per unit is illustrated below, with each bar representing the average NPV of a scheme or asset group. This data is also included in table format at Appendix 1.

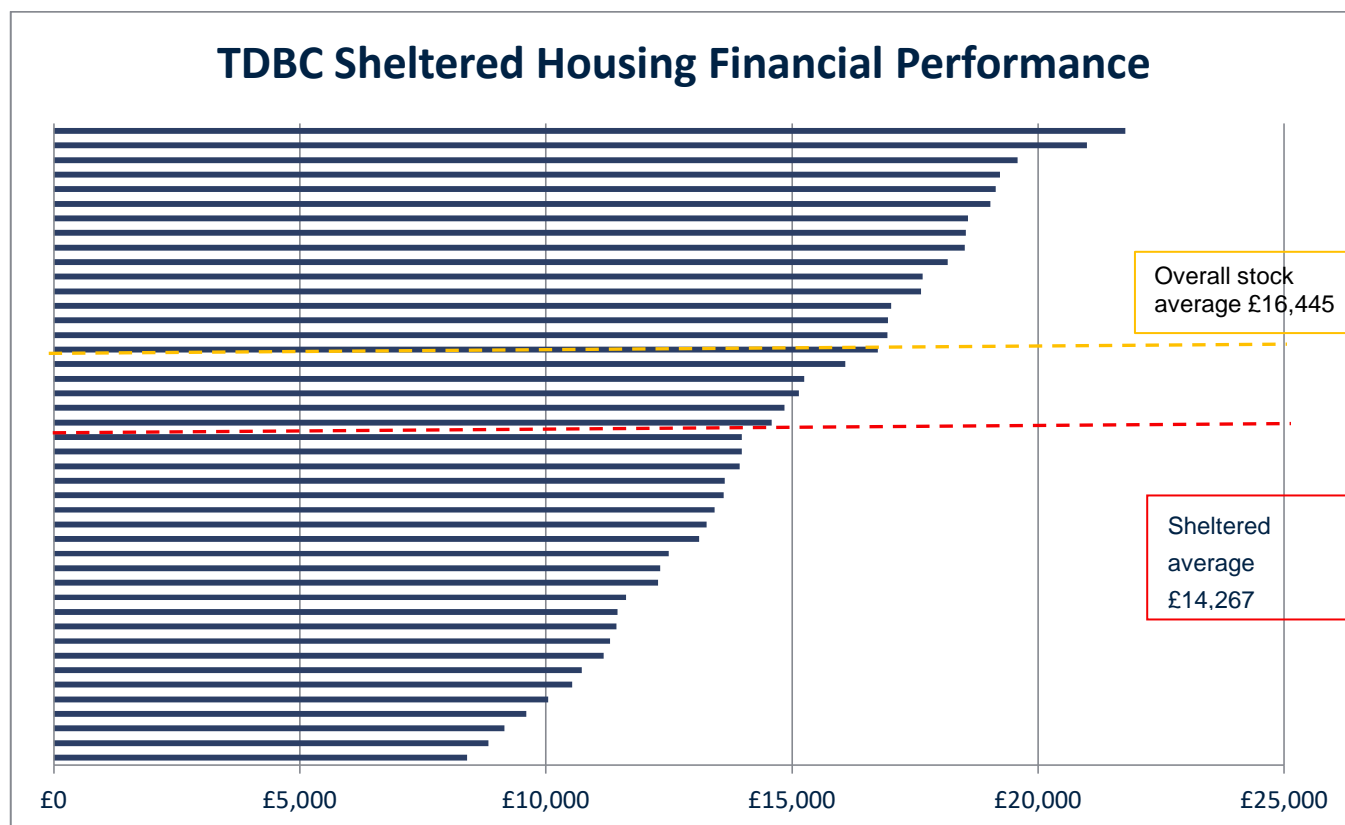


Figure 3: Sheltered Housing NPV analysis

The chart illustrates the wide range of performance across the stock. While the financial performance of the majority of schemes is below the whole stock average, there are some

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strong performers, predominantly bungalows including at Lodge Close, Middleway, Chapman/Roland all in Wellington, Creedwell Orchard in Milverton, and Leachs Field/Quantock Road, Treborough/Fletcher Close, Heathfield Drive/Richards Crescent in North Taunton and Charter/Milton/Coleridge and Polkesfield/Dinhams in the Halcon neighbourhood.

Flats perform more poorly than bungalows financially in the majority of cases. The poorest financial performance is identified at flats at Kilkenny, Lyngford Road/Place, Broomfield House and Warwick Road/Slapes Close in North Taunton, and Moorland Place and Monmouth Road, South Road/Tauntfield Close at Halcon. Poor performance is driven predominantly by low rents charged for small properties. Higher than average void loss is also driving poor performance at Kilkenny, Lyngford, Broomfield and Moorland. Higher than average investment need is a driver at South Road/Tauntfield Close, but not at other schemes. Kilkenny void loss is affected by major works linked to recent investment and is unlikely to be an issue with an ongoing healthy waiting list. When taken into account these factors will improve Kilkenny's performance and are not reflected in the NPV figures currently.

3.2.2. Non financial analysis

Each scheme was also included in the non financial or social sustainability analysis carried out for the whole stock. The indicators were designed to fit with the Council's overall social housing objectives and while not specific to sheltered housing, contain many factors relevant to the future sustainability of the sheltered portfolio. The full range of indicators used is illustrated below.

Measure	Data Indicators	Weighting
Excellent Services (38%)	Resident satisfaction with place	7.7%
	Resident satisfaction with home	7.7%
	Anti-social behaviour and total crime	7.7%
	Rent arrears	7.7%
	Noise complaints & environmental health complaints	7.7%
Supporting the Most Vulnerable (38%)	Health IMD	7.7%
	Education IMD	7.7%
	Employment IMD	7.7%
	Benefit take up	7.7%
	Tenancy Turnover	7.7%
Investment in Homes (23%)	Barriers to housing and services, Geo. Access IMD	7.7%
	Fuel poverty (Heating type and Income deprivation)	7.7%
	Rates of bidding	7.7%

Table 4: Non financial indicators used in whole stock sustainability analysis.

The best and worst performing sheltered schemes against this analysis are illustrated below. The letters F/M and B indicate flat/maisonette and bungalow.

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Asset Groups	Total Excellent Services	Total Supporting the Most Vulnerable	Total Investment in Homes	Combined sustainability score
Patch 9 Fairwater F/M Trad 1980 - 1999 GN + 6 Shelt (Willie Gill)	6.0	7.0	6.3	6.5
Shelt - Wellington - Bovet/George B	6.0	6.4	7.0	6.4
Shelt – West Wellington area - Creedwell/Plain Pond F/M + 4 B	5.0	8.6	4.0	6.2
Shelt - Halcon - Greenlands F/M + 6 B	7.2	5.8	4.3	6.0
Patch 9 West Monkton F/M Trad 1965 - 1979 GN + 5 Shelt (Heathfield)	5.4	7.6	4.3	6.0
Shelt - Halcon - Moorland/Crossway B	5.2	1.6	4.0	3.5
Patch 7 Lyngford F/M Trad 1919 - 1944 GN + 2 Shelt (Lyngford Place)	2.4	1.6	7.0	3.2
Shelt - Halcon - Monmouth F/M + 3 B	4.6	2.0	2.7	3.2
Shelt - North - Lyngford F/M	2.8	2.2	4.3	2.9
Shelt - Halcon - Moorland/Crossway F/M	3.6	1.4	3.7	2.8

Table 5: High/Low performing sheltered schemes from social sustainability analysis (whole stock).

Low scores are driven by high levels of deprivation generally in the community, as well as low demand/high turnover for the sheltered schemes, low levels of resident satisfaction and in some cases high levels of complaints relating to noise and environment issues.

This analysis has been used in the asset management strategy for the whole stock, in order to identify those units where the relative position of financial and non-financial performance may inform the nature of intervention that could improve performance. For example

- a high NPV but low sustainability score may indicate a need for community investment, alongside asset investment to improve the Council's ability to deliver its housing objectives, in the case of sheltered housing, to ensure the long term attractiveness of the scheme to future residents.
- a low NPV but high sustainability score may indicate a need for regeneration or redevelopment to improve the physical quality of the buildings in an area of high sustainability.

3.2.3. Sensitivity analysis

We have carried out some additional sensitivities on the financial performance of the stock, in order to reflect specific issues relating to supported housing. This is a test to see where pressure could be experienced in the business plan if certain circumstances arise – it does not reflect or expressly recommend changes to the business plan.

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Support costs

One risk faced by many social landlords is that the cost of providing support and services to the schemes is higher than the amount recovered from service charge. The demise of Supporting People funding has meant that Taunton Deane Borough Council has already had to take steps to manage this risk. Commissioning practices have changed with a stronger focus on outcomes and this is reflected in Taunton Deane's policy of needs based support provision.

The recent service charge review has introduced funding for staffing (Intensive Housing Management (IHM)) and community activities through service charges paid by all tenants, with additional outcome focused support funded from County Council grant provided to tenants with higher needs following assessment. This removes the need to consider sensitivities around unfunded service or support provision.

However sheltered housing providers face other risks to income and costs which could impact on the future financial sustainability of schemes. The major issues to be considered include

- Additional expenditure required to bring schemes up to a new supported housing standard
- Restrictions in income as a result of welfare reform, limiting rents and service charges to Local Housing Allowance (LHA) levels from April 2019.

Increased capital expenditure requirement

The survey has identified that additional expenditure would be required in order to improve the communal aspects of many schemes, including improved communal decoration, dementia friendly signage and sensor lighting. There are other aspects externally such as improved access to bin stores, scooter storage and environmental improvements. The needs of each scheme are different and detailed surveys would be required to confirm costs in each case. As a test of affordability we have included a provision of £20,000 to each scheme to provide resources for required improvements. As stated above, this is a test rather than a recommendation, and is not reflected in the business plan. We have only applied this allowance to schemes with flatted blocks. While this would provide a level of funding for items listed above, it will not resolve larger issues relating to lift access and other issues remain, such as access to the scheme itself which cannot be resolved through increased expenditure. The results of this sensitivity are illustrated at Appendix 2.

The increase in expenditure reduces the NPV in all cases. Smaller schemes show a larger reduction, as the average spend per unit is higher. Sheltered housing cashflows are already weak and therefore any increase in expenditure needs to be carefully considered in this context. Any further reduction in the worth of these cashflows would reduce business plan capacity further, which would impact on other investments in other parts of the portfolio. Long term demand for the scheme will be a factor in considering whether further investment represents value for money.

One issue to highlight in particular here is the position regarding Kilkenny Court. The scheme has the lowest NPV of all supported housing at £8,393. If the additional expenditure of £20,000 is assumed to be required, this reduces the NPV to £7,998.

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However, there has been a considerable amount of recent investment at the scheme, including the installation of wet rooms and refurbishment of individual units. The stock condition survey identified a future expenditure requirement of £32,300 per unit over 30 years (average), including £441,500 needed in the short term in the first 5 years. It would appear from the recent history of improvement works that some of this work has already been carried out, and therefore ongoing capital expenditure requirement would be reduced. If the work carried out to date meant that investment need in the next 5 years is half that predicted at the time of survey, this would increase the NPV of cashflows to £12,366 per unit, moving it into the mid range of financial performance.

Reduced rental income

Another potential risk is that rents and eligible service and Intensive Housing Management charges are limited to LHA levels in future. Modelling the impact of this can only be illustrative at this stage as many details of the implementation of this policy are not yet confirmed by government. The model assumes static stock, rents decreasing 1% annually from 2017, and service/IHM charges increasing annually by CPI. The higher Intensive Housing Management charge from 2017 has been included in the model. The model assumes full occupancy of each property, but under-occupancy is explored further below.

Based on this, from April 2019 there will be 168 properties with rents and charges that are above LHA rates, despite being eligible for full payment under the current housing benefit system. A further 314 properties have rents and charges within £5 of LHA rates.

Intensive Housing Management charges are pushing rents above LHA rates. There are no properties whose rent and eligible service charges alone are above, or indeed within £5 of, the LHA rate.

The breakdown of those that would be above the rates is as follows:

	Extra care	Sheltered	Total
£0.10-£4.99	50	80	130
£5-£9.99	26	0	26
£10-£15	12	0	12
Total	88	80	168

The proposed policy is that from April 2019 supported housing tenants will not be able to claim more than LHA levels for their accommodation. This will apply to all tenants at once and is not being phased in as originally proposed. If their rent (plus eligible service and support charge) is above LHA rates then a local authority may choose to pay the balance. Increased funding will be passed to local authorities, based on current spending, and ringfenced for this purpose. It is not clear whether this funding will come to county or district level, or if the payment will be agreed per person or per landlord/scheme – discussions around administrative practicalities are ongoing.

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In Taunton Deane's case an Intensive Housing Management charge is included in rent for low level support provision. Higher level support is funded by the County Council and not through rent, so these costs are not caught by the cap.

The properties where IHM charges push rent above LHA rates should be considered as a risk to future income, because funding from the local authority to cover the shortfall is not guaranteed. The authority will need to make choices about which supported housing properties in the area to fund from its finite pot. It is possible that shortfalls could be passed on to tenants if they were not covered by the separate funding stream, as they are for the most part manageable amounts. However this would be on top of payments for the alarm service which many sheltered tenants already pay.

It is possible that potential under-occupancy will become an issue for people above retirement age when LHA rates are applied to sheltered housing. The under-occupancy charge (bedroom tax) that applies in social housing is for working age households only. However, if the LHA rules that apply to private rented tenants were applied in social housing as well as the caps, this position would change.

LHA is only payable for the number of rooms a household is eligible for rather than the number of rooms they actually have. People living in sheltered accommodation tend to be single people or couples, and therefore are usually only eligible for one bedroom. Taunton Deane has 79 x 2 and 3 bed sheltered properties where tenants could be at risk of not having the full rent taken into account in benefit assessments because of the LHA rules. Government has not published the detail of how LHA caps would operate, so there is no certainty that the under-occupancy issue would arise. However it is something Taunton Deane should be mindful of until proposals are formally confirmed.

Rents for 56 of these properties are higher than the 1 bed LHA rate, with the shortfall ranging from £0.18 to £14.65 per week. 31 are above £5 and a further 6 are above £10. If the IHM charges are excluded, only 4 properties are higher than the 1 bed rate and a further 29 are within £5.

The council may wish to consider its allocations policy for 2 and 3 bed sheltered accommodation. It may also wish to review those with the highest rents with a view to re-designating as general needs on relet. This would help to avoid problems created by reduced demand or rent arrears in coming years.

Sheltered schemes that are particularly affected by the new LHA policy are Middleway, Taunfield Close, Robin Close and Greenlands. Both Extra Care schemes are affected.

3.2.4. Conclusions from asset performance evaluation

The results of both financial and non financial analysis for the whole stock have been used to inform the identification of poorly performing schemes where options appraisals are required to consider options for improved performance.

The results of the financial evaluation of performance show that the poorest performing schemes tend to be flatted schemes including Lyngford Road/Place, Broomfield House, Warwick Road/Slapes Close in North Taunton, and Moorland Place and Monmouth Road,

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South Road/Tauntonfield Close at Halcon. Kilkenny could also fall in this category, although performance could be improved if the value of work recently carried out is taken into account.

The social sustainability analysis mirrors this picture, with flatted schemes performing more poorly in particularly at Moorland Place and Lyngford Road/Place.

These results have then been supplemented with a scheme by scheme analysis against the aspirational sheltered housing standard in the following section.

4. Sheltered Housing Standard

4.1. National best practice

Understanding of the housing needs and aspirations of older people is developing as the profile of Britain's older people changes. This can come from practical experience of what works (e.g. to maintain health and wellbeing) or from gathering the views people who are, or soon will be, classed as 'older'. Standards for housing can, and should be, rooted in ways that mean older people's housing can best respond to this emerging understanding.

There has traditionally been a lot of focus on how physical design can best support positive outcomes for older people. The areas specified have been updated as technology has improved and awareness of its potential to support social care outcomes has grown. Recently, increased emphasis has been placed on service availability and facilitation of social connections.

Physical design standards recommended by HAPPI and HOPDEV remain valid today, although changes in technology and increased emphasis on dementia and mental health should be taken into account. They indicate that standards should include:

- "Housing should be well designed with growing older in mind: it should meet the needs of all age groups. We should build adaptable 'homes for life';
- Space is important: we often need room to accommodate visiting family or a carer and need good storage space;
- Housing design should be user friendly, low maintenance and safe – a downstairs WC and bathroom with shower and bath are especially important. Our homes should also be affordable to heat;
- Access to green, private space and a safe neighbourhood is important, as is housing that is accessible to good local transport, facilities and amenities;
- Access to independent information and advice about our housing options is needed;
- Support is necessary for people to stay living in their own homes. A reliable repairs and adaptation service is needed for that bit of help around the home;
- But above all, people want to be listened to, to be involved in the design of everything that will affect us, from planning and lifetime homes standards, to the creation of safe environments, to testing new equipment and IT devices⁴."

This last point is picked up by HAPPI3 a follow-up to the 2009 work. It expressly states a need to move beyond design factors and to focus on approaches to provision that will encourage people to make confident moves into retirement housing. Standards drawing on the points raised in this report should include:

- Clarity on service charges, fees and management arrangements
- High level of resident control over decisions affecting the home and provision of care

⁴ CLG National Housing Strategy for Housing in an Ageing Society (2008), page 21.

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The Centre for Better Ageing⁵ commissioned a study of the opinions of older people. By asking people about their priorities, concerns and preparedness for later life the study identified six household segments that can categorise older people. These segments indicate how households may be experiencing life, especially in terms of finances, social connectivity, health, and feelings of wellbeing. Some of these segments will be more prevalent in rented retirement housing, and the nuances are useful to inform service planning. At risk of oversimplifying, reduced financial resources correlate with worse health and reduced social connectivity so more focus on these would be required to achieve levels of wellbeing comparable to other segments. The findings suggest that standards should reflect:

- Proximity to amenities (transport, social and medical)
- Ability for residents to remain in areas in which they are already established
- Facilitation of social connectedness to assist those who find it hardest.

Residents' priorities and concerns should inform standards adopted by providers for their retirement housing, as should understanding of how the design and functions of that housing impact on health and wellbeing outcomes for residents. Needs and expectations do change as the older population changes and awareness of how some of their challenges can be addressed develops. Standards therefore need to take in current priorities and capacity but also leave flexibility for future evolution so that physical assets that are likely to be in use for a long time can remain current and relevant.

4.2. Developing a standard for Taunton Deane

Taunton Deane Borough Council has recently drafted its own standard for sheltered and extra care housing and is considering whether to adopt this. If adopted, the standard will form part of a toolkit for assessing the future viability of a sheltered housing scheme. It identifies the key attributes of good sheltered housing and where a scheme meets or falls short of these attributes.

The standard has been developed by staff in consultation with the Supported Housing Development Group (sheltered and extra care) and by the Tenants' Forum. Not all aspects of the standard are currently part of the Council's approach to sheltered housing. In order to consider the feasibility of adopting this standard, and in order to understand the relative performance of each group of properties, a scheme appraisal has been carried out across the sheltered portfolio which assesses each scheme against the standard.

The standard measures a range of attributes including design, accessibility, security, location, presentation, the physical condition of the scheme, and demand. To reflect the constraints of existing buildings, it sets a higher standard for new build than existing properties. It covers both hard and soft criteria, just as residents' own criteria do, so by its nature will not be entirely objective. It provides a useful assessment of the scheme which, together with other sustainability factors, will improve planning and investment decisions. A scheme which does not match these exact standards can nevertheless, in the right location, provide good quality retirement housing in the medium term for those with minimal support needs and where investment requirements are modest.

⁵ Later in life in 2015: An analysis of the views and experiences of people aged 50 and over; Centre for Better Ageing/IpsosMORI; December 2015

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Its core components cover communal areas, individual accommodation, and external areas. Optimising access is a key concern in all areas of the standard. In summary, the standard covers:

Communal

- Communal areas that are well decorated, bright, welcoming, sensor lighting and dementia friendly signage.
- Communal facilities/meeting halls that are warm, welcoming, well furnished, carpeted or with hard wearing anti-slip flooring as appropriate, with cooking facilities, Wi-Fi (also accessible to individual flats).
- Main entrances with secure entry, porches, fire doors that can be fob activated to act as additional entrance doors, door entry systems.
- Accessible
- Wind and weather tight – with good quality thermal insulation
- Well maintained and easily accessible lifts (where lifts are in place)
- Guest rooms with shower/WC, regularly decorated in ECH.

Individual

- Adequate living space, with separate bedroom(s), and living areas that are large enough for dining and comfortable seating or for family members to stay (particularly if there is no guest room in the scheme)
- Accessible for wheelchair users e.g. easy-opening doors, turning space, fixtures at appropriate height
- Windows - Double glazing, easy open, secure.
- Secure flat entrance doors, preferably with letter boxes.
- Efficient heating systems, with ability to control temperature in individual rooms, low cost in use
- Sound insulation between dwellings
- Well ventilated modern bathrooms, with shower facilities (or a wet room in ECH)
- Service and facilities to enable people to remain in their own homes – e.g. life line, telecare, adaptations
- Modern kitchen facilities and kitchens that are large enough to house 3 white goods (particularly if there are no good quality laundry facilities on site)

External

- Safe and accessible paths
- Access to amenities – local transport, shops and social facilities
- External lighting
- Scooter storage and recharging facilities
- Adequate car parking – with good signage and resident priority
- Good quality accessible landscaping,. with seating and patio areas and secure fencing
- Appropriate bin stores

Some separate criteria have been included for extra care housing. This reflects the different expectations of the two types of provision so, for example, the extra care standard requires meeting rooms on site rather than in the locality, requires communal bathing facilities, and includes external landscaping and scooter storage.

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The full standard for supported and extra care housing is presented in at Appendix 3.

4.3. Appraising existing schemes against the standard

Methodology

All of the Council's sheltered properties were appraised against the standard by staff with knowledge of the properties. The first appraisals were facilitated by Savills to ensure a consistent approach. The sheltered stock in Taunton Deane does not comprise traditional sheltered 'schemes' with a block of flats with a common entrance and communal on site facilities such as a meeting room, laundry etc.

For the purposes of scoring, the properties have been grouped with other sheltered properties on a geographical basis to form 'schemes', broadly aligned with the groupings in the asset performance evaluation (although bungalows and flats were not separated). This approach enables the Council to structure discussions and assumptions about likely investment programmes

The appraisal rated the schemes on a range of measures including their size, presentation and location as well as the facilities provided and the activities which are promoted. Schemes were awarded a maximum of 4 points for each aspect of the standard which they met.

Some items within the standard are only relevant to schemes which have communal entrances, and are therefore not applicable to a number of schemes. The percentages for the schemes have therefore been calculated based on the total score available to that scheme based upon the available facilities.

Overview of results

Generally, the schemes appear to do fairly well on size and standard facilities. However, location and accessibility are an issue at many schemes. Overall, a large proportion of schemes scored below 50% of available points making them appear relatively poor. The 14 best and worst performing sheltered schemes against this analysis are illustrated overleaf. The full results of the appraisal are at Appendix 4.

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Facilities	Scheme Name	Scheme Total	Potential Total	%
No communal	Bruford close & Manor Drive	31	84	36.9%
Communal	Broomfield	42	108	38.9%
Communal	Warwick Slapes Dorchester	44	108	40.7%
Communal	Polkesfield, Dinhams	45	108	41.7%
No communal	Creedwell Orchard	35	84	41.7%
Communal	Dowell	46	108	42.6%
Communal	Lyngford Rd and Place	46	108	42.6%
Communal	Newton Rd	60	108	55.6%
Communal	Robin & Chaffinch	61	108	56.5%
Communal	Churchill, Middleway	69	112	61.6%
Extra Care	Lodge Close ECH	74	112	66.1%
No communal	Bovet, George St and Stedhams	57	84	67.9%
Extra Care	Kilkenny ECH	90	116	77.6%
Communal	Creech-barrow only	93	108	86.1%

Table 6: High/Low performing sheltered schemes from scheme appraisal against sheltered housing standard

Of the 5 schemes which have no communal facilities, only 2 scored over 50% of the available total. Of the 23 schemes which do have communal facilities, only 9 score over 50%. Staff who were involved in the scoring of the schemes have indicated that in some cases this may be partly driven by a small number of outlying properties being added to the 'scheme' and bringing down the overall total. Similarly staff expressed the view that in some cases the blocks of flats are 'pulling scores down' where these are mixed in with bungalows. In these circumstances staff knowledge has been overlaid on the raw scores before decisions are taken on next steps.

This analysis makes clear that a large proportion of schemes fall a long way short of the aspirational standard. However it should be recognised that the standard and its requirements are new, and that they reflect fairly recent changes in both sector practice and customer expectation. Time and money will be needed to meet these standards.

The scheme appraisal process has identified a number of commonly occurring factors which prevent schemes from fully meeting the standard:

- Many communal front entrances have a 'lip' on the door way making them inaccessible for wheelchairs
- Lots of the first floor flats do not have lifts and some cannot accommodate stair lifts
- Current investment standards include like for like replacements of baths rather than the installation of a shallow shower tray or wet rooms
- It has not been policy to fund automatic doors or wet room style bathrooms.
- Most sheltered schemes do not have scooter charging points at present
- No schemes have dementia friendly signage and colour coded floors that would aid orientation.

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Descriptions of the worst and best performing schemes give a flavour of what drives the appraisal scores.

- Worst performing schemes

The poorest performer of the schemes with no communal facilities is Bruford Close/Manor Drive which scored a total of 31 points (36.9%) with Bruford pulling down the overall score, closely followed by Creedwell Orchard with a total of only 35 (41.7%).

Bruford properties are referred to as 'mini flats' due to their small size. The main issue at Creedwell Orchard is the lack of accessibility on the whole site. The scheme is not well lit, the residents have decorated the communal areas themselves making it difficult for TDBC to control the quality and it is also difficult to access. The flats do not have modern bathrooms and lack storage as well as having storage heaters. Parking can be an issue as people visiting the neighbouring Doctor's surgery often park at and around the scheme. The scheme has a good meeting room and there are shops locally as well as being on a bus route. There are also general needs properties at this scheme.

Of the schemes which have communal facilities, the poorest performer was Broomfield with a total of 42 points (38.9%). The scheme is in a decent physical condition according to staff, but it is built on a slope with steps between blocks and down to the bin store and a step up to the communal kitchen and meeting room. The communal corridors are narrow with no space to turn a wheelchair. The scheme has limited parking with only 5 spaces and no disabled bays or ambulance point. The individual properties are small with a non-visual door entry system and communal heating with individual controls. On a positive note, the scheme is on a good bus route and has a hardwired telecare system. Investment could be made to improve the heating system and to do some remodelling, but this would be expensive and would still leave a number of issues unresolved.

- Best performing schemes

The highest performing sheltered scheme is Seabrook House in Creechbarrow Road. This is based on assumed scores as the properties are a new build which is still in development.

The highest performing existing sheltered scheme with communal facilities is Churchill, Middleway. The reasons given are good outside space, accessible, well lit with good parking provision and a good meeting room. The internal scheme accessibility is not so good, there is no door entry system and the interior is not particularly welcoming. The bungalows and individual flats have good space and modern kitchens and bathrooms with plenty of storage and an individually controlled heating system. Some simple and relatively inexpensive work could be carried out which would considerably improve the overall score.

Concluding thoughts - potential responses

Schemes could be altered so that they score much more highly against the standard, but few cheap quick wins are evident with the exception of improving orientation/signage and maintenance on paths that have become inaccessible with overgrowth. Interventions would generally require one or both of:

- Changes to major repairs programmes e.g. changing specification for bathrooms or communal external/internal doors

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- Physical remodelling e.g. to increase space; provide meeting rooms and scooter charging points; improve communal hallways; or create level access.

Some schemes score poorly due to limited parking space or lack of proximity to shops and services, and it may not be possible to remedy these.

The Council has mapped out unsuitable sheltered properties to be swapped out for more suitable properties. This will improve the sheltered stock profile but not deal with all of the low scoring properties.

We understand that the Council has carried out further investigations to consider the expenditure that would be required to adopt the standard where feasible in each scheme. The sensitivity analysis carried out as part of the financial evaluation shows that the cashflows for the majority of schemes are already weak, with limited capacity to bear additional expenditure, without subsidy from the broader business plan.

However, whilst working in the constraints of prioritisation for expenditure and working within Business Plan allowances, it should be possible to take some positive steps towards the standard over time. We understand that efficiencies have already enabled funding to be identified for improvements that will move towards the standard. In addition provision can be made so that components appropriate to meet the standard can be used in void or responsive repairs, and this would bring improvements over time.

5. Options appraisal

5.1. Identification of candidates for options appraisal

Options appraisal is the next step after the performance of assets has been ascertained. It is a consideration of ways to address poor financial and social performance of an asset, carried out because action can reduce long-term pressure on the business plan and free up financial capacity to invest in more sustainable existing stock, new stock, or other priorities. It can also reduce vulnerability to further income shocks such as rent reductions, increased bad debts etc.

The criteria for identifying schemes for further review is based on

- schemes which score poorly against the sheltered housing standard, and could not reasonably be brought up to standard some of which also have a poor NPV below average for Taunton Dene overall stock
- schemes where opportunities exist to expand and improve land use

Several schemes were identified for further review. They were appraised for both development and investment potential as follows:

- Sell as development opportunity
- Sell as market rent investment opportunity
- Retain as Council-led affordable housing development opportunity
- Retain as Council rental investment opportunity.

Where schemes scored poorly against the sheltered housing standard but NPV was good, ways to retain and improve stock were identified.

5.2. Appraisal methodology

The following key assumptions were used to appraise redevelopment and use as market rent:

1. Decommission and sale on the basis of a purchaser redeveloping the site for a new residential scheme:

- A planning policy compliant scheme mix – 25% affordable housing where a requirement is triggered (with potential Vacant Building Credit to offset a proportion of the 25% affordable housing requirement)
- Market comparable residential values
- The Council's costs of achieving vacant possession estimated at £8300 per sitting tenant
- Build costs estimates based on information from the Building Cost Information Service (BCIS)
- Professional fee allowances and disposal costs estimated by Savills using industry standard assumptions

2. Decommission and conversion to market rent (this could also be the Council or Council company as purchaser/investor):

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- All units let out at market rents using Savills comparables
- Minimal capital investment set at £10K for 1 bed, £15K for 2 beds, and £25K for bungalows.
- 15 year investment period
- Voids 2%
- Bad debts 3%
- £500 maintenance per unit per annum
- £1000 management and admin per unit per annum

The option of demolition and re-provision of social rented homes is not recommended as the sites yield marginal gains in terms of density and return on investment.

5.3. Site appraisal commentary

Development potential

All of the sites have some residential development potential but are mostly relatively marginal opportunities. The appraisals, based on planning policy compliant development mix, all currently show negative land values. These positions would improve by applying less cautious assumptions including reduced affordable housing requirements, higher densities, and some cost reductions. Vacant Building Credit may offset a proportion of the 25% affordable housing requirement. These are the measures that developers would take to reach positive land values. These tactics, coupled with competitive tension, often produce higher land values when opportunities are put to the market. However it should also be noted that many of these sites are not the easiest development opportunities; key issues acting as a drag on land value include low underlying residential values, lack of market depth and physical site characteristics. The sites are unlikely to attract larger housebuilders given their size, location, and availability of more attractive sites. Smaller developers/contractors may be attracted if appropriate pre-marketing is undertaken.

Investment potential

More central sites have some investment potential given their location and the existence of a rental market. More rural sites are less likely to be of interest to rental market investors given the relative weakness of the rental market in these locations. Other key issues will be the current condition and configuration of the residential units and the capital investment requirements, both of which have not been assessed as part of this exercise. We are aware that some of the units are small and not necessarily optimum for the rental market. This translates either into the need for greater capital investment to configure them to be more market facing, or a lower value based on it being a less than optimal product and therefore attracting lower rents. Other options include the Council converting to general needs where demand exists; increasing rents to Affordable rent levels as part of a development funding agreement with the Homes and Communities Agency; retention by the Council for market rent levels potentially through a Council owned investment vehicle; and converting to temporary accommodation / homelessness prevention accommodation. Another practical option would be disposal to contribute to the higher value assets levy to be imposed on council by DCLG. This would need to be fully explored in light of the need to gain vacant possession. In exploring all of these the Council would need to be mindful of the same underlying market issues that any other investor would consider.

6. Future strategy

6.1. Review conclusions

This review of sheltered housing stock has been conducted to inform development of the Council's future sheltered housing strategy. It has considered matters relating to the physical stock including:

- Physical standards that would ideally be met by all the Council's sheltered housing
- The financial viability of the current stock and its capacity to contribute to identified needs now and in the future
- Future options for underperforming stock, in terms of how different approaches could contribute to addressing identified challenges and meeting needs and aspirations.

As far as possible it has taken into account local changes to revenue funding and impending changes to housing benefit for benefit dependent tenants.

The review does highlight some challenges for Taunton Deane around its sheltered stock.

In summary:

- The challenges relate to its limited positive contribution to the business plan, limited capacity to provide a standard of accommodation that many residents and professionals would aspire to, and pressure that would be placed on the business plan by investment to achieve the aspirational standard.
- Options for addressing these may seem more limited than would be ideal. However there are constructive approaches that can be taken to tackling these challenges.

The conclusions are that:

- Generally the sheltered housing properties are in overall fair condition, with most building element deterioration being in line with the life expectancy of the elements. Stock condition is for the most part not a drag on financial or social performance of the properties
- The properties do not perform well against the council's aspirational standard, which relates to how physical design and facilities match customer expectations and could impact on quality of life or wellbeing. Location and accessibility are a particular drag on performance across much of the portfolio, and size also features in some schemes. Delivering improvements would therefore be costly, although Taunton Deane's non-scheme based model of provision offers some other opportunities to improve the profile of the portfolio over time
- Much of the stock will continue to meet an identifiable market need, but it would be wise to anticipate pressures arising from reduced demand
 - The range of people the stock appeals to is likely to narrow, as market provision of options for better off households expands and has a stronger appeal to aspirations. The physical design of much of the council's accommodation may be a deterrent, although the cost may be an attractor
- Cashflows are weak - this limits capacity for investment and also limits resilience to future financial shocks

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- The average NPV for sheltered stock is £14,267, which is 13% lower than the average for the whole stock. This is driven by low rents associated with this stock, and in some cases high voids
- Some stock does have strong financial performance, above the average for the whole stock, but this is a minority of properties
- Future financial pressures from changes to revenue are not expected to be severe
 - The council has already revised its funding model for support services in light of changes at county level – this has reduced external pressures but created an ongoing need for internal subsidy
 - The impact of changes to housing benefit in 2019 does not look to be significant, although consideration should still be given to mitigations especially in extra care schemes
- Financial pressures resulting from expenditure on the stock beyond what is already in the business plan would be more significant. Any further reduction in the worth of the cashflows would reduce business plan capacity further, which would impact on other investments in other parts of the portfolio. Long term demand for the scheme should be a factor in considering whether further investment represents value for money
- Some pockets of stock have poor social performance, which largely relates to relative deprivation and associated social problems in the area they are located
- All of the sites that have both low NPV and poor performance against the Taunton Deane standard have some residential development potential but they are mostly relatively marginal opportunities. Limitations are mostly due to site location, property size and the market in operation around the schemes
- Some of the central sites with both low NPV and poor performance against the Taunton Deane standard have some potential for sale into a rental investment portfolio given their location and the existence of a rental market. Again, the size of the properties would be likely to negatively impact both price and demand.

6.2. Next steps – future strategy

The council aspires to take a strategic approach to sheltered housing strategy that would ensure provision of housing for older people aligned with local need, deliver solid financial performance, work towards an achievable best practice standard, ensure the physical characteristics of properties meet the aspirations of residents, and support the council's wider social objectives. In the current environment, and with the physical stock currently designated as sheltered housing, this is a challenging goal.

The stock caters for an important need in the borough, and the council's ongoing involvement with sheltered provision is not called into question by this review. However clear steps to ensure alignment with need and aspiration, and to reduce pressure on the business plan, should be identified.

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Actions to achieve the strategic approach outlined above would include:

- For the stock with lowest financial and social performance, a commitment to considering viability of alternative uses within the council remit as natural vacancies occur. This would involve re-designation of stock, or sale to any council-owned Local Housing Company, and re-provision elsewhere. Re-designation of social stock would increase exposure to both the Right to Buy and the cap on housing benefit payable to single people under 35 years old.
- Seeking efficiencies and alternative specifications in the investment programme that could see performance against the Taunton Deane standard improved within the existing spending projections
- Further consideration of re-development and investment opportunities identified in the options appraisal. Modelling alternative development mixes, and more in-depth review of local development and sale markets, could highlight approaches that contribute more strongly to the council's objectives
- Consideration of whether the council wishes to be involved with provision of retirement housing for slightly wealthier client groups. The local need has been identified and there does appear to be a gap in the otherwise buoyant market, and so involvement would complement the council's existing offer.

We are aware that officers already have several workstreams underway relating to the performance of the sheltered housing stock. In operational terms this analysis has already been used in the asset management strategy for the whole stock, in order to identify those units where the relative position of financial and non-financial performance may inform the nature of intervention that could improve performance. This should deliver efficiencies in performance and, over time, improve quality of sheltered housing provided for residents. Officers have also been exploring the cost of achieving the aspirational standard and mechanisms for meeting this.

The council's commitment to sheltered provision is tangible, and residents have benefited from the successful efforts to maintain stock to a good standard. A firm long term strategy would build on this commitment and secure appropriate provision for the future.

7. Appendix 1: Portfolio details and analysis

Neighbourhood	Scheme name	Property Type			
		Bedsit	Bungalow	Flat	Grand Total
HALCON	Calway, Coleridge, Trinity		4	40	44
	Crossways, Moorland Close and Place		26	14	40
	Greenlands		6	24	30
	Harnell, Normandy, Milton		13	24	37
	Monmouth, Charter		5	24	29
	Newton Rd		3	28	31
	Polkesfield, Dinhams		24	7	31
	South Road, Tauntfield		21	20	41
HALCON Total			102	181	283
NORTH TAUNTON	Broomfield			18	18
	Darby Way		32		32
	Dowell		6	24	30
	Fletcher Close, Treborough		14	24	38
	Heathfield Drive, Elms Estate, Richards Crescent		33	5	38
	Hope corner Lane and Upper Quantock		6	24	30
	Kilkenny ECH			44	44
	Leachs Field		9		9
	Lyngford Rd and Place	4		14	18
	Triscombe, Lower Quantock		2	8	10
	Warwick Slapes Dorchester		30	16	46
	Wellesley Road, Grange Walk, Enmore, Cheddon		9	45	54
	Willie Gill			6	6
NORTH TAUNTON Total		4	141	228	373
WELLINGTON Area	Bovet, George St and Stedhams		58	1	59
	Bruford close & Manor Drive		1	3	4
	Chapman, Henderson & Roland		19	22	41
	Churchill, Middleway		9	24	33
	Creedwell Orchard			15	15
	Lodge Close ECH		26	18	44
	Robin & Chaffinch		22	9	31
	Bulford, Squirrel Court		10	81	91
	Plain Pond		4		4
WELLINGTON Total			149	173	322
Grand Total		4	392	582	978

Table 7: Scheme breakdown by neighbourhood and property types

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Scheme	Unit nos	NPV per unit	Scheme appraisal grouping
Patch 9 Lyngford Kilkenny F/M Trad 1980 - 1999 ExCare	44	£8,393	Kilkenny ECH
Shelt - North - Lyngford F/M	16	£8,833	Lyngford Rd and Place
Shelt - North - Broomfield F/M + 1 GN	18	£9,153	Broomfield
Shelt - Halcon - Moorland/Crossway F/M	14	£9,602	Crossways, Moorland Close and Place
Patch 9 Fairwater F/M Trad 1980 - 1999 GN + 6 Shelt	6	£10,042	Willie Gill
Shelt - Halcon - Monmouth F/M + 3 B	27	£10,530	Monmouth, Charter
Shelt - Halcon - South Road/Tauntfield F/M	20	£10,725	South Road, Tauntfield
Shelt - North - Warwick/Slapes F/M	16	£11,172	Warwick Slapes Dorchester
Shelt - North - Hope Corner/Quantock F/M	32	£11,308	Hope corner Lane and Upper Quantock
Shelt - Halcon - Greenlands F/M + 6 B	30	£11,435	Greenlands
Shelt - Halcon - Newton F/M + 3 B	31	£11,458	Newton Rd
Patch 4 Wellington North Lodge Close F/M Trad 1965 - 1979 & 1980 - 1999 ExCare	18	£11,625	Lodge Close ECH
Patch 9 Pyrland & Rowbarto F/M Trad 1965 - 1979 GN + 3 Shelt	3	£12,276	Wellesley Road, Grange Walk, Enmore, Cheddon
Shelt - Halcon - Calway/Trinity F/M	40	£12,323	Calway, Coleridge, Trinity
Shelt - North - Wellesley/Grange F/M + 6 GN + 9 B	45	£12,494	Wellesley Road, Grange Walk, Enmore, Cheddon
Shelt - North - Treborough/Fletcher F/M	24	£13,115	Fletcher Close, Treborough
Patch 7 Lyngford F/M Trad 1919 - 1944 GN + 2 Shelt	2	£13,267	Lyngford Rd and Place
Shelt - North - Dowell/Willie Gill F/M + 6 B	30	£13,429	Dowell
Shelt - Halcon - Normandy/Harnell F/M + 7 B	31	£13,614	Harnell, Normandy, Milton
Patch 9 Lyngford F/M Trad 1965 - 1979 GN + 6 Shelt	6	£13,637	Wellesley Road, Grange Walk, Enmore, Cheddon

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Scheme	Unit nos	NPV per unit	Scheme appraisal grouping
Shelt - Wellington - Roland/Chapman F/M	22	£13,935	Chapman, Henderson & Roland
Shelt - Halcon - Moorland/Crossway B	26	£13,981	Crossways, Moorland Close and Place
Patch 4 Wellington North F/M Trad 1919 - 1979 GN + 1 Shelt	1	£13,982	Bovet, George St and Stedhams
Shelt - North - Warwick/Slapes B	30	£14,584	Warwick Slapes Dorchester
Shelt - Wellington - Churchill/Middleway F/M	24	£14,850	Churchill, Middleway
Shelt - North - Darby Way B	32	£15,136	Darby Way
Shelt - Wellington - Bulford/Squirrel F/M + 1 GN	80	£15,248	Bulford/Squirrel
Patch 6 Manor & Wilton F/M Trad 1965 - 1979 GN + 3 Shelt	3	£16,082	Bruford close & Manor Drive
Shelt - North - Heathfield/Richards B	33	£16,748	Heathfield Drive, Elms Estate, Richards Crescent
Shelt - Wellington - Robin/Chaffinch B + 8 F/M	30	£16,939	Robin & Chaffinch
Shelt - Halcon - South Road/Tauntfield B	21	£16,955	South Road, Tauntfield
Shelt - Halcon - Polkesfield/Dinhams B + 8 F/M + 1 GN	31	£17,014	Polkesfield, Dinhams
Shelt - North - Treborough/Fletcher B	14	£17,620	Fletcher Close, Treborough
Shelt - Wellington - Bovet/George B	58	£17,659	Bovet, George St and Stedhams
Shelt - Halcon - Calway/Trinity B	12	£18,163	Calway, Coleridge, Trinity
Patch 4 Wellington & Rockwell F/M Trad 1919 - 1979 GN + 1 Shelt	1	£18,511	Bulford/Squirrel
Patch 9 West Monkton F/M Trad 1965 - 1979 GN + 5 Shelt	5	£18,537	Heathfield Drive, Elms Estate, Richards Crescent
Shelt - North - Hope Corner/Quantock B	17	£18,578	Hope corner Lane and Upper Quantock
Shelt - Wellington - Bulford/Squirrel B	10	£19,032	Bulford/Squirrel
Patch 4 Wellington North Lodge Close B Trad 1965 - 1979 ExCare	28	£19,143	Lodge Close ECH

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Scheme	Unit nos	NPV per unit	Scheme appraisal grouping
Patch 6 Bishops Hull F/M Trad 1965 - 1979 GN + 1 Shelt	1	£19,227	Robin & Chaffinch
Shelt – West Wellington area - Creedwell/Plain Pond F/M + 4 B	19	£19,590	Creedwell Orchard
Shelt – Wellington area - Roland/Chapman B	19	£20,994	Chapman, Henderson & Roland
Shelt – Wellington area - Churchill/Middleway B	10	£21,779	Churchill, Middleway
Total	980	£14,267	

Table 8: NPV analysis by asset group

8. Appendix 2: Stock Condition Survey sensitivity comparison

Asset Group/Scheme	Original NPV	SCS Allowance	Revised NPV
Patch 9 Lyngford Kilkenny F/M Trad 1980 - 1999 ExCare	£8,393	Y	£7,998
Shelt - North - Lyngford F/M	£8,833	Y	£7,745
Shelt - North - Broomfield F/M + 1 GN	£9,477	Y	£8,560
Shelt - Halcon - Moorland/Crossway F/M	£9,602	Y	£8,358
Patch 9 Fairwater F/M Trad 1980 - 1999 GN + 6 Shelt	£9,298	Y	£8,054
Shelt - Halcon - Monmouth F/M + 3 B	£10,530	Y	£9,885
Shelt - Halcon - South Road/Tauntfield F/M	£10,725	Y	£9,854
Shelt - North - Warwick/Slapes F/M	£11,172	Y	£10,084
Shelt - North - Hope Corner/Quantock F/M	£11,308	Y	£10,764
Shelt - Halcon - Greenlands F/M + 6 B	£11,435	Y	£10,855
Shelt - Halcon - Newton F/M + 3 B	£11,458	Y	£10,896
Patch 4 Wellington North Lodge Close F/M Trad 1965 - 1979 & 1980 - 1999 ExCare	£11,625	Y	£10,658
Shelt - Halcon - Calway/Trinity F/M	£12,323	Y	£11,888
Shelt - North - Wellesley/Grange F/M + 6 GN + 9 B	£12,648	Y	£12,306
Shelt - North - Treborough/Fletcher F/M	£13,115	Y	£12,390
Shelt - North - Dowell/Willie Gill F/M + 6 B	£13,429	Y	£12,848
Shelt - Halcon - Normandy/Harnell F/M + 7 B	£13,614	Y	£13,052
Patch 9 Lyngford F/M Trad 1965 - 1979 GN + 6 Shelt	£13,780	Y	£13,054
Shelt - Wellington - Roland/Chapman F/M	£13,935	Y	£13,143
Shelt - Wellington - Churchill/Middleway F/M	£14,850	Y	£14,125
Shelt - Wellington - Bulford/Squirrel F/M + 1 GN	£15,233	Y	£15,018
Shelt - Wellington - Robin/Chaffinch B + 8 F/M	£16,939	Y	£16,359
Shelt - Halcon - Polkesfield/Dinhams B + 8 F/M + 1 GN	£16,979	Y	£16,434
Patch 9 West Monkton F/M Trad 1965 - 1979 GN + 5 Shelt	£17,250	Y	£15,799
Shelt — West Wellington area- Creedwell/Plain Pond F/M + 4 B	£19,590	Y	£18,674

Table 9: Stock condition sensitivity comparison

9. Appendix 3: The draft Taunton Deane sheltered housing standard

Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
External					
Paths	Safe and accessible paths for those in wheel chairs and visually impaired: well maintained and in line with building regulations as below: <ul style="list-style-type: none">▪ Ensure that footpaths are smooth but slip resistant, constructed with concrete, of 1200mm minimum width and with adequate space to negotiate obstacles, turn and pass.▪ Provide protective edgings, kerbs or rails where footpaths are significantly higher than adjacent ground levels or where adjacent ground significantly falls away.▪ Ensure that gradients to footpaths or routes within a development do not exceed the following distance or ratio:-<ul style="list-style-type: none">○ 2m max @ 1:12○ 5m max @ 1:15▪ Ensure the maximum length of slope is limited to suit the gradient with top, bottom and, where required, intermediate landings▪ Dropped kerbs▪ Contrast edging on steps and tactile (paving) warnings	✓	✓	✓	✓
Landscaping & Outside	Good quality, colourful, soft wheel chair accessible landscaping, well maintained on a regular basis including grass, trees, fallen leaves and moss	✓		✓	✓
	Well maintained seating and patio areas	✓		✓	
	Secure well maintained fencing	✓		✓	✓
	Signage to keep dogs on leads in communal external areas	P	P	P	P
	Drying areas accessible and easy to use	✓	✓	✓	✓
Bin stores	Accessible fit for purpose bin stores in sheltered housing schemes and additional separate bin stores for clinical waste in extra care schemes.	✓	P	✓	✓
	Large communal wheeled bins for sheltered blocks with communal recycling bins preferred if feasible (keeps communal areas and flats clear in relation to fire hazard)	P	P	✓	✓
Scooter storage	Scooter storage and recharging facilities in extra care schemes; where funds allow assistance for individual scooter users in sheltered housing	✓	I	✓	P
Parking	Adequate car parking – with good signage and	✓	✓	✓	✓

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Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
	resident priority				
	Disabled parking bays	✓	✓	✓	✓
- Parking	Ambulance bays and crossings	✓		✓	
Lighting and safety	External lighting - no dark areas, on steps and external bin stores; lighting should be low level and unobtrusive and bright enough for those with poor eyesight to see	✓	✓	✓	✓
	Steps – mark edges white/contrast - hand rails	✓	✓	✓	✓
Orientation	Clear signage with good contrast inc. flat numbers - sited with reasonable lighting or lit at night	✓	✓	✓	✓
Access	Extra care housing (ECH) should be wheel chair accessible and readily adaptable. Ideally this should apply to sheltered housing and will apply to any new build. The minimum standard should be to ensure that the range of sheltered property includes at least 75% level access accommodation suitable for those with mobility problems accessible and adaptable for users of wheel chairs, and those with visual	✓	75%	✓	✓
	Key Safes & door entry pads, if installed, should be w/c accessible level 750 -1200 mm				
	Dropped kerbs, level access	✓	✓	✓	✓
General					
	Wind and weather-tight including well maintained gutters, drains and down pipes	✓	✓	✓	✓
	Good quality thermal insulation	✓	✓	✓	✓
	For Safety reasons all external locks should be on a suited system with master keys or fobs held by the alarm control centre for emergency services access	✓	✓	✓	✓
	Statutory regulatory compliant fire systems, doors, equipment, appropriate to each building and service type	✓	✓	✓	✓
	Access to amenities – regular local transport, shops and social facilities – (note some rural schemes may not meet all of these)	✓	P	✓	✓
Communal					
<i>Note: not all sheltered schemes have communal space or meeting halls</i>					
General	Well decorated, bright, welcoming	✓	✓	✓	✓

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Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
	Communal facilities that are warm, welcoming, well and appropriately furnished	✓	✓	✓	✓
Access - Access	Wheel chair accessible	✓	P	✓	✓
	Accessible position: <ul style="list-style-type: none"> ▪ Sockets and switches ▪ Kitchen work surfaces and ▪ Door entry pads ▪ Meeting hall key safes 				
	Dementia friendly clear signage internally and externally including fire signage	✓	P	✓	✓
	Sensor lighting (low level externally)	✓	✓	✓	✓
Flooring	Good quality carpets or anti slip hard wearing floor coverings as appropriate	✓	✓	✓	✓
	One light colour throughout a whole level and a different light colour for each floor level in line with dementia standards.	✓		✓	
Windows	Double glazing, easy open, secure. Windows should be longer levered, levers positioned low on casement, rod provided for adjusting ventilation	✓	✓	✓	✓
Accessible Meeting Halls	Accessible meeting halls are needed in ECH and Sheltered developments as a community facility	✓	✓	✓	✓
	ECH should have integral meeting halls on site	✓		✓	
	Sheltered schemes should have meeting halls within reasonable distance		✓		✓
	No meeting hall: Treborough (20); Polkesfield (26); Bovet/George Street (58); Calway/Coleridge/Trinity (41); Greenlands/Harnell/Normandy/Milton (67); Dowell (30); Slapes/ Dorchester/Warwick/Lyngford (56 units), Plain Pond (4 units) Bruford+ (4 units) Leachsfield (9); Dinhams(5) Willie Gill (6) Solution could be: negotiating use of/ sharing of non TDBC existing facilities				
	<i>Review of meeting hall facilities underway and consultation with tenants on facilities</i>				
Accessible Meeting Halls	Cooking facilities	✓	✓	✓	✓
	Kitchenette – storage, facility: to make hot drinks, cooking and washing up	✓	✓	✓	✓
	Disabled toilet facilities – toilets should have adequate space for a carer as well Note: Tauntonfield toilet facilities are not disabled or w/c accessible making the hall not fit for purpose –	✓	✓	✓	✓

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Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
	this will need to be an urgent action to remedy				
	Powered door openers in disabled toilets and entrances where not possible to manage without this aid due to the location of the facility and manoeuvring space	P	P	✓	✓
	Community alarm in all communal rooms including toilets	✓	✓	✓	✓
	V block electrical sockets at accessible heights	✓	P	✓	P
	Computer terminal and in line with any tenant consultation	✓	P	✓	P
	Adequate lockable storage for equipment and materials for activities, additional chairs and tables	✓	✓	✓	✓
	Hearing Loop	✓	✓	✓	✓
	Wi-fi	✓	✓	✓	✓
Guest rooms	Accessible guest rooms located near meeting halls where there is demand, with shower/wc – <i>in sheltered provide guest rooms only in relation to proven demand</i>	✓	?	✓	?
Main Entrances	Main entrances with secure entry, porches	✓	✓	✓	✓
	Door entry systems linked to visual display (preferred ECH or new build sheltered and EC)	P		✓	✓
	Door entry systems that are positioned to be wheel chair accessible	✓	✓	✓	✓
	Welcoming reception areas	✓	P	✓	✓
Doors	External - w/c accessible with no threshold (use alternative – weather stripping)	✓	P	✓	✓
	Fire doors that can be fob activated to act as additional entrance doors	P		✓	✓
	Where self-closers are required, ensure independent operation from a wheelchair is possible, Consideration must be given to installing powered door openers if specified opening pressure cannot be achieved.	✓	✓	✓	✓
	Well maintained accessible lifts	✓		✓	✓
Assisted Bathrooms	Assisted communal bathrooms including baths as well as level access showers, remodelled where there is demand (Kilkenny). Remove/convert where no demand (Lodge) – see individual bathrooms also	✓		✓	
Individual Spaces					
General accessibility	Flats should ideally be a minimum of 10m ² x 6 m ² If schemes have no guest room, do flats have space	✓	P	✓	✓

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Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
-General accessibility	for friends/family to stay? Sizes should be in line with HAPPI standard and in new build layout should be wheel chair friendly and accessible				
	Adequate turning space for wheelchairs	✓	✓	✓	✓
	Adequate living space, with separate bedrooms, and living areas that are large enough for dining and comfortable seating or for family members to stay (i.e. space for sofa bed - particularly if there is no guest room in the scheme)	✓	P	✓	✓
	Accessible height position <ul style="list-style-type: none"> ▪ Spy holes ▪ Sockets and switches ▪ Bathroom controls ▪ Door entry pads ▪ Electric metres 	P	P	✓	✓
Aids, adaptations, telecare	Access to service and facilities to enable people to remain in their own homes – e.g. life line, telecare, adaptations. Lifelines should be capable of adaptation for future assistive technology required e.g. Bosch with GSMs.	✓	✓	✓	✓
Flooring	Hard wearing anti-slip floor coverings bathrooms and kitchens and throughout designated adapted disabled flats	✓	P&D	✓	P&D
Doors	Secure and choices of design	✓	✓	✓	✓
	External doors in ECH and sheltered housing should be lockable by key only (i.e. not lock on closing), and suited	✓	✓	✓	✓
	External - w/c accessible with no threshold (use alternative – weather stripping)	✓	D	✓	✓
	Internal door frames and at least one external door should be adequate for w/chairs	✓	✓	✓	✓
	Accessible spy holes positioned at the right height (i.e. lower or can be added for individuals wherever the position is an issue)	✓P	✓P	✓	✓
	Where self-closers are required, ensure independent operation from a wheelchair is possible, Consideration must be given to installing powered door openers if specified opening pressure cannot be achieved.	✓	✓	✓	✓
Windows	Double glazing, easy open, secure, lockable (keys provided to tenants) Windows should be longer levered, levers positioned low on casement, rod provided for	✓	✓	✓	✓

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Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
	adjusting ventilation.				
Heating	Efficient heating systems, with ability to control temperature in individual rooms, low cost in use where possible.	✓	✓	✓	✓
	Sound insulation between dwellings			✓	✓
Bathrooms	Well ventilated modern bathrooms	✓	✓	✓	✓
	Ensure clear manoeuvring space not less than 1800 x 1800mm to enable wheelchair user sufficient space to adequately access wc, basin and shower area.	✓	P	✓	✓
	(Level access) Wet room (min. 1000 x 1000) essential in extra care housing and preferable also in sheltered housing or shallow tray if not suited to level access.	✓	P	✓	✓
Extra care and designated disabled flats in sheltered	Provide 2x 450mm long grab rails grab rails, 1 on shower, 1 on adjacent wall in ECH	✓	D	✓	D
	Shower controls at 1200 cm height	✓	✓	✓	✓
	Thermostatically controlled shower with extended hose suitable for wheelchair operation to be provided with extended lever controls and adjustable head.			✓	✓
	Shower curtain rail fixed 1820mm above floor level with heavy-duty weighted shower curtain provided.	✓	✓	✓	✓
	Carer doors on shower	✓	P	✓	P
All sheltered/ ECH	Full height white tiling to all bathroom walls (walls adjacent to shower if not wet room)	✓	✓	✓	✓
	Single row of contrasting border tiles at the same height as the shower controls (aids the visually impaired and those living with dementia or balance problems)	✓	✓	✓	✓
Extra care and designated disabled flats in sheltered	Wet floor' facility finished with slip resistant vinyl sheet, 'Altro High Performance' range flooring or similar approved, laid to falls to a gully positioned below the bath location, dressed into floor gully and up 150mm high skirting formed with cove formers and top edge capping strip	✓	✓D	✓	✓
	Select and position to be approached in wheelchair with shallow but good capacity bowl, support for arms, reachable and usable taps. Basin shall be a non-pedestal type to allow space beneath for access			✓	✓
Bathrooms Extra care and	Ensure independent approach/transfer to and use of all fittings including manoeuvring space clear of fittings and of door swing if inward opening.			✓	✓

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Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
designated disabled flats in sheltered	Select and position for a range of transfers and for provision of support rails later to suit user. WC suites to be part M compliant, including raised seats, grab rails and drop arm support aids. Doc M packs to be supplied but NOT fitted.			✓	✓D
	Ensure that walls and ceiling are adequate for adjustable height basins and subsequent fixings of hoists, seats, supports and other fittings. Stud walls to the bathrooms and cloakrooms to be lined in 18mm WBP exterior quality hardwood plywood, with moisture resistant plasterboard			✓	✓D
Kitchen	Modern kitchen facilities and kitchens that are large enough to house 3 white goods (particularly if there are no good quality laundry facilities on site) with range of w/c accessible properties	✓	P	✓	✓
	Tenants to be consulted on height of wall cupboards when renewed through replacement programme (Tenants preferred adjustable height cupboards or provide service to have set at height to suite individual tenant's needs if not accessible at no cost to tenant – Rails are best solution (not ratchets)	P	P	✓	✓
	Storage: <ul style="list-style-type: none"> Provide storage appropriate to the size of dwelling, the major proportion of which is to be in a position and format usable from a wheelchair. Drawer runners will be metal and will include 'stops' 	✓	✓	✓D ✓	✓D ✓
Kitchen Designated disabled flats	Kitchen Layout:				
	To provide a practical working kitchen for a wheelchair user.	✓	P	✓	✓
	Ensure clear manoeuvring space not less than 1800 x 1800mm.	✓	P	✓	✓
	Ensure wherever practicable, that windows are positioned for ease of control and cleaning. Where windows are inaccessible because of worktops, an electrically operated window opener will be supplied.	✓	✓	✓ ✓D	✓ ✓D

Supported Housing Review

Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
Kitchen Designated disabled flats	Worktops: <ul style="list-style-type: none"> New build designated disabled properties only: provide a length of 600mm deep worktop suitable for a wheelchair user with clear knee space below and appropriate to the size of the dwelling as set out in the Housing Quality Indicators Version 4 Unit Layout requirements, or such standard which may supersede. Clear manoeuvring space In new build designated disabled units only and ideally if affordable all existing ECH: all worktops should be on adjustable brackets to range from 700mm to 900mm with tiling behind (using rails not ratchets). This should be adjusted to fit the incoming tenant. Fascia boards and vertical poles should be avoided within the main working area. To allow non-wheelchair user to comfortably use a worktop there should be also a section set at 900mm. This can also be used to accommodate appliances such as washing machine beneath. New build designated disabled only: it must be easy to move equipment between hob and sink, therefore a worktop with unobstructed knee space is required between these units. 	✓D ✓	 P	✓D ✓ ✓D ✓ ✓D	✓D ✓ ✓D ✓ ✓D
	Sink: <ul style="list-style-type: none"> New build designated disabled only: provide integral shallow sink with minimum 150mm bowl depth drainer to maximise height adjustability, with insulated bowl, suitable for a wheelchair user (with clear knee space below), and accessible, easily manipulate mixer tap with swivel arm extending over drainer or worktop. The length of worktop including the sink/ drainer will be height adjustable. Drainer will be handed to the hob side 	✓D		✓D	✓D
	Controls and lighting: <ul style="list-style-type: none"> Where worktops are adjustable, fit switches and sockets to worktop with enough cable to accommodate the change in worktop height. Sockets to kitchen worktop spaces to be installed on blocks. A minimum of 4 sockets above the worktop at an appropriate position for using kettle, microwave, toaster and other labour 	✓D ✓ ✓ ✓	✓D ✓ P P	✓ ✓ ✓ ✓	✓D ✓ ✓ ✓
Kitchen Designated disabled flats and ECH					

Supported Housing Review

Area	Attributes	Existing Stock		New Build/ Redevelop	
		ECH	Shelt	ECH	Shelt
	<p>saving equipment.</p> <ul style="list-style-type: none"> Provide remote and labelled switches for appliances and equipment. Combine general lighting with well positioned task lighting. 				
	<p>Refuse:</p> <ul style="list-style-type: none"> Provide suitable internal refuse arrangements, such as 1 x Nr. 10 litre refuse bins, manageable from a wheelchair 			✓D	✓D
Electric sockets and switches	<p>Reasonable number of sockets – 8 -12</p> <p>Accessible electric sockets and switches:</p> <ul style="list-style-type: none"> Socket outlets - appliances Set remote switches generally at maximum 900mm from FFL. Where above fixed worktop, set switches on blocks. Set sockets served by remote switches at min 600mm from FFL where they are below worktops. Specify sockets with large switches, on outer ends of double sockets. Set sockets at 900mm from FFL. Where sockets are installed above fixed worktops, the sockets will be mounted on suitable blocks. Specify full plate or larger rocker/toggle light switches, two-way where required, and set at maximum 900mm from FFL. Where pull switches are required, provide large pull at maximum 900mm high from FFL. 	<p>P</p> <p>✓D</p>	<p>P</p> <p>✓D</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>

10. Appendix 4: Scheme appraisal results

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29				
		Pat	Lan	Bin	Scot	Par	Lig	Ori	Acc	Ge	Ge	Acc	Flo	Wi	Me	Gu	Ma	Do	Ass	Ge	Aid	Flo	Do	Wi	He	Bat	Kit	Sto	Co	Ele	Scheme	Potential	%	
	Scheme Name	he	dsc	stor	ote	kin	htin	ent	ess	ner	ner	ess	ori	ndo	etin	rest	ine	ore	iste	ner	s, a	ori	ore	ndo	atin	hro	chen	rag	entr	ctri	Total	Total	%	
Sheltered w/ Communal	Broomfield	1	3	1	0	1	2	0	0	3	0	0	0	3	0		1	1		1	2	0	4	3	3	2	2	3	3	3	42	108	38.9%	
Sheltered w/ Communal	Bulford/Squirrel	2	3	1	0	1	4	0	3	3	2	0	1	0	4		1	1		4	4	0	2	3	3	2	3	4	3	3	57	108	52.8%	
Sheltered w/ Communal	Robin & Chaffinch	1	3	1	0	2	3	0	3	4	2	0	1	2	4		1	1		4	4	0	2	3	4	3	3	4	3	3	61	108	56.5%	
Sheltered w/ Communal	Chapman, Henderson & Roland	1	3	2	0	2	1	0	1	4	2	0	1	0	2		1	0		3	4	0	2	3	4	3	3	2	3	3	50	108	46.3%	
Sheltered w/ Communal	Churchill, Middleway	2	4	2	0	3	3	0	4	3	2	1	1	2	4	1	1	3		4	4	0	2	3	4	3	3	4	3	3	69	112	61.6%	
Sheltered w/ Communal	Calway, Coleridge, Trinity	2	2	2	0	0	2	0	1	3	1	1	0	3	0		1	2		3	4	0	3	3	3	3	3	2	3	3	50	108	46.3%	
Sheltered w/ Communal	Creech-barrow only	4	4	3	0	3	3	4	4	4	4	4	4	4	0		4	4		4	4	4	4	4	4	4	4	2	3	3	93	108	86.1%	
Sheltered w/ Communal	Crossways, Moorland Close and Place	2	2	2	0	2	2	0	2	3	0	0	0	1	4		0	0		3	4	2	3	3	3	3	3	2	3	3	52	108	48.1%	
Sheltered w/ Communal	Newton Rd	2	1	2	0	2	3	0	1	3	1	0	1	3	4		2	2		3	4	3	3	3	3	3	3	2	3	3	60	108	55.6%	
Sheltered w/ Communal	Greenlands	2	3	3	0	1	2	0	1	3	1	2	1	1	0		1	0		3	4	3	3	3	3	3	3	2	3	3	54	108	50.0%	
Sheltered w/ Communal	Harnell, Normandy, Milton	1	2	2	0	2	2	0	2	2	2	2	1	3	0		2	3		3	4	3	3	3	3	3	3	2	3	3	59	108	54.6%	
Sheltered w/ Communal	Monmouth, Charter	2	3	1	0	1	2	0	1	3	1	0	1	0	0		1	0		3	4	3	3	3	3	3	3	2	3	3	49	108	45.4%	
Sheltered w/ Communal	Polkesfield, Dinham	1	2	1	0	1	1	0	1	3	0	0	1	1	0		1	1		3	4	2	3	3	3	2	3	2	3	3	45	108	41.7%	
Sheltered w/ Communal	South Road, Tauntonfield	1	2	2	0	1	1	0	1	3	1	0	1	1	4	3	2	2		3	4	3	3	3	2	3	3	2	3	3	57	112	50.9%	
Sheltered w/ Communal	Warwick Slapes Dorchester	3	2	1	0	1	1	0	0	3	1	0	0	1	0		0	1		3	4	2	3	3	3	2	2	2	3	3	44	108	40.7%	
Sheltered w/ Communal	Willie Gill	3	2	1	0	1	2	0	1	3	3	1	1	1	0		2	1		3	4	2	3	3	3	2	3	2	3	3	53	108	49.1%	
Sheltered w/ Communal	Dowell	2	3	2	0	2	1	0	2	3	1	0	0	2	0			0		3	4	0	2	3	3	2	3	2	3	3	46	108	42.6%	
Sheltered w/ Communal	Heathfield Drive, Elms Estate, Richards Crescent	1	3	1	0	1	1	0	1	3	1	1	1	2	3	1	2		3	4	0	2	3	3	2	3	2	3	3	3	50	108	46.3%	
Sheltered w/ Communal	Wellesley Road, Grange Walk, Enmore, Cheddon	1	2	2	0	2	2	0	2	3	1	1	1	2	3		1	2		4	4	0	2	3	3	2	4	2	3	3	55	108	51.2%	
Sheltered w/ Communal	Fletcher Close, Treborough	1	3	1	0	2	1	0	2	3	1	1	1	2	0		1	2		4	4	0	2	3	3	2	3	2	3	3	50	108	46.3%	
Sheltered w/ Communal	Hope corner Lane and Upper Quantock	2	3	2	1	2	2	0	2	3	1	1	1	2	4	4	2	2		4	4	0	2	3	1	2	3	2	3	3	61	112	54.5%	
Sheltered w/ Communal	Triscombe, Lower Quantock	2	2	2	0	2	2	0	1	3	1	1	1	2	0		2	2		2	4	0	2	3	3	2	3	2	3	3	50	108	46.3%	
Sheltered w/ Communal	Lyngford Rd and Place	2	2	0	1	1	1	0	1	3	1	0	1	2	0		1	2		3	4	0	2	3	3	2	3	2	3	3	46	108	42.6%	
		1253																																
Sheltered no Communal	Bovet, George St and Stedhams	3	3	2	0	3	4	0	4			0			0					4	4		2	3	4	3	4	4	3	3	57	84	67.9%	
Sheltered no Communal	Creedwell Orchard	0	2	1	0	2	1	0	1	2		0			3				2	4		2	2	1	2	2	4	2	3	3	35	84	41.7%	
Sheltered no Communal	Bruford close & Manor Drive	1	2	0	0	2	1	0	1	2		0			0				1	4		2	3	2	1	1	2	3	3	3	31	84	36.9%	
Sheltered no Communal	Darby Way	1	3	2	0	2	1	0	1	3		2			3				3	4		2	3	3	2	3	2	3	3	46	84	54.8%		
Sheltered no Communal	Leachs Field	1	2	2	0	2	1	0	1	3		2			0				4	4		2	3	2	2	3	2	3	3	42	84	50.0%		
		211																																
Extra Care	Kilkenny ECH	3	3	4	4	3	2	2	4	4	3	2	1	3	4	3	3	4	4	3	4	3	3	3	3	4	3	2	3	3	90	116	77.6%	
Extra Care	Lodge Close ECH	1	4	2	4	2	3	1	3	3	2	1	1	2	4	2	2	3		4	4	3	3	3	3	3	3	3	2	3	3	74	112	66.1%
		164																																

Scheme appraisal results

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29			
		Pat	Lan	Bin	Sco	Par	Lig	Ori	Acc	Ge	Ge	Acc	Flo	Wi	Me	Gu	Mai	Do	Ass	Ge	Aid	Flo	Do	Wi	He	Bat	Kit	Sto	Co	Ele	Scheme	Potential	%
Scheme Name		ha	dsc	stor	ote	kin	htin	g	ee	ner	ner	ee	ori	ndo	etin	rest	n	ore	iste	ner	s,	ori	ore	ndo	atin	hro	chen	rag	cntr	ctri	Total	Total	%
Sheltered w/ Communal	Broomfield	1	3	1	0	1	2	0	0	3	0	0	0	3	0		1	1		1	2	0	4	3	3	2	2	3	3	3	42	108	38.9%
Sheltered w/ Communal	Bulford/Squirrel	2	3	1	0	1	4	0	3	3	2	0	1	0	4		1	1		4	4	0	2	3	3	2	3	4	3	3	57	108	52.8%
Sheltered w/ Communal	Robin & Chaffinch	1	3	1	0	2	3	0	3	4	2	0	1	2	4		1	1		4	4	0	2	3	4	3	4	3	3	61	108	56.5%	
Sheltered w/ Communal	Chapman, Henderson & Roland	1	3	2	0	2	1	0	1	4	2	0	1	0	2		1	0		3	4	0	2	3	4	3	2	3	3	50	108	46.3%	
Sheltered w/ Communal	Churchill, Middleway	2	4	2	0	3	3	0	4	3	2	1	1	2	4	1	1	3		4	4	0	2	3	4	3	3	4	3	3	69	112	61.6%
Sheltered w/ Communal	Calway, Coleridge, Trinity	2	2	2	0	0	2	0	1	3	1	1	0	3	0		1	2		3	4	0	3	3	3	3	3	2	3	3	50	108	46.3%
Sheltered w/ Communal	Creech-barrow only	4	4	3	0	3	3	4	4	4	4	4	4	4	0		4	4		4	4	4	4	4	4	4	4	2	3	3	93	108	86.1%
Sheltered w/ Communal	Crossways, Moorland Close and Place	2	2	2	0	2	2	0	2	3	0	0	0	1	4		0	0		3	4	2	3	3	3	3	3	2	3	3	52	108	48.1%
Sheltered w/ Communal	Newton Rd	2	1	2	0	2	3	0	1	3	1	0	1	3	4		2	2		3	4	3	3	3	3	3	3	2	3	3	60	108	55.6%
Sheltered w/ Communal	Greenlands	2	3	3	0	1	2	0	1	3	1	2	1	1	0		1	0		3	4	3	3	3	3	3	3	2	3	3	54	108	50.0%
Sheltered w/ Communal	Harnell, Normandy, Milton	1	2	2	0	2	2	0	2	2	2	2	1	3	0		2	3		3	4	3	3	3	3	3	3	2	3	3	59	108	54.6%
Sheltered w/ Communal	Monmouth, Charter	2	3	1	0	1	2	0	1	3	1	0	1	0	0		1	0		3	4	3	3	3	3	3	3	2	3	3	49	108	45.4%
Sheltered w/ Communal	Polkesfield, Dinhams	1	2	1	0	1	1	0	1	3	0	0	1	1	0		1	1		3	4	2	3	3	3	2	3	2	3	3	45	108	41.7%
Sheltered w/ Communal	South Road, Tauntfield	1	2	2	0	1	1	0	1	3	1	0	1	1	4	3	2	2		3	4	3	3	3	2	3	3	2	3	3	57	112	50.9%
Sheltered w/ Communal	Warwick Slapes Dorchester	3	2	1	0	1	1	0	0	3	1	0	0	1	0		0	1		3	4	2	3	3	3	2	2	2	3	3	44	108	40.7%
Sheltered w/ Communal	Willie Gill	3	2	1	0	1	2	0	1	3	3	1	1	1	0		2	1		3	4	2	3	3	3	2	3	2	3	3	53	108	49.1%
Sheltered w/ Communal	Dowell	2	3	2	0	2	1	0	2	3	1	0	0	2	0			0		3	4	0	2	3	3	2	3	2	3	3	46	108	42.6%
Sheltered w/ Communal	Heathfield Drive, Elms Estate, Richards Crescent	1	3	1	0	1	1	0	1	3	1	1	1	2	3		1	2		3	4	0	2	3	3	2	3	2	3	3	50	108	46.3%
Sheltered w/ Communal	Wellesley Road, Grange Walk, Enmore, Cheddon	1	2	2	0	2	2	0	2	3	1	1	1	2	3		1	2		4	4	0	2	3	3	2	4	2	3	3	55	108	51.2%
Sheltered w/ Communal	Fletcher Close, Treborough	1	3	1	0	2	1	0	2	3	1	1	1	2	0		1	2		4	4	0	2	3	3	2	3	2	3	3	50	108	46.3%
Sheltered w/ Communal	Hope corner Lane and Upper Quantock	2	3	2	1	2	2	0	2	3	1	1	1	2	4	4	2	2		4	4	0	2	3	1	2	3	2	3	3	61	112	54.5%
Sheltered w/ Communal	Triscombe, Lower Quantock	2	2	2	0	2	2	0	1	3	1	1	1	2	0		2	2		2	4	0	2	3	3	2	3	2	3	3	50	108	46.3%
Sheltered w/ Communal	Lyngford Rd and Place	2	2	0	1	1	1	0	1	3	1	0	1	2	0		1	2		3	4	0	2	3	3	2	3	2	3	3	46	108	42.6%
																															1253		
Sheltered no Communal	Bovet, George St and Stedhams	3	3	2	0	3	4	0	4	4		0			0					4	4		2	3	4		3	4	3	3	57	84	67.9%
Sheltered no Communal	Creedwell Orchard	0	2	1	0	2	1	0	1	2		0			3					2	4		2	2	1	2	2	2	3	3	35	84	41.7%
Sheltered no Communal	Bruford Close & Manor Drive	1	2	0	0	2	1	0	1	2		0			0					1	4		2	3	2	1	1	2	3	3	31	84	36.9%
Sheltered no Communal	Darby Way	1	3	2	0	2	1	0	1	3		2			3					3	4		2	3	3	2	3	2	3	3	46	84	54.8%
Sheltered no Communal	Leachs Field	1	2	2	0	2	1	0	1	3		2			0					4	4		2	3	2	2	3	2	3	3	42	84	50.0%
																															211		
Extra Care	Kilkenny ECH	3	3	4	4	3	2	2	4	4	3	2	1	3	4	3	3	4	4	3	4	3	3	3	3	4	3	2	3	3	90	116	77.6%
Extra Care	Lodge Close ECH	1	4	2	4	2	3	1	3	3	2	1	1	2	4	2	2	3		4	4	3	3	3	3	3	3	2	3	3	74	112	66.1%
																															164		

Appendix B

Key replacements are programmed as follows (from 50% surveyed)

YEAR

[illegible]

Equality Impact Assessment Form and Action Plan

Expand boxes as required. Guidance notes are stored - TDBC link:

<http://portal/sites/policyPerf/strategyandpartnerships/equality/Equality%20Impact%20Assessment%20GuidanceTemplate/Forms/AllItems.aspx> WSC 'W' drive: W:\Equalities\EIA TEMPLATE

<p><i>"I shall try to explain what "due regard" means and how the courts interpret it. The courts have made it clear that having due regard is more than having a cursory glance at a document before arriving at a preconceived conclusion. Due regard requires public authorities, in formulating a policy, to give equality considerations the weight which is proportionate in the circumstances, given the potential impact of the policy on equality. It is not a question of box-ticking; it requires the equality impact to be considered rigorously and with an open mind."</i>¹</p>			
Officer completing EIA form:	Job Title:	Team/Service:	
Jan Errington	Project Manager	Housing Services	
Why are you completing the impact assessment? Please ✓ as appropriate			
Proposed new policy or service	Change to policy or service	New or Change to Budget	Service review
	✓		
1 Description of policy, service or decision being impact assessed:			
<p>Sheltered and Extra Care Housing (ECH) is accommodation for vulnerable older people with support needs. ECH is specialist housing for those who may be frail or disabled and may have long-term care and higher support needs. TDBC has reviewed its Sheltered and Extra Care Housing portfolio with a view to achieving the key elements of a new aspirational supported housing standard incrementally over the 30 year business plan through (a) use of suitable components for sheltered and extra care housing fitted in a way appropriate to the needs of vulnerable older people (b) stock rationalisation so that the sheltered housing portfolio incorporates the most suitable stock and swaps out the most unsuitable stock to general needs use. In addition, stock performance has been appraised financially and against the aspirational standard, with the result that a number of schemes will merit further investigation and options appraisal.</p>			

¹ Baroness Thornton, March 2010

Equality Impact Assessment Form and Action Plan

Expand boxes as required. Guidance notes are stored - TDBC link:

<http://portal/sites/policyPerf/strategyandpartnerships/equality/Equality%20Impact%20Assessment%20GuidanceTemplate/Forms/AllItems.aspx> WSC 'W' drive: W:\Equalities\EIA TEMPLATE

2 People who could be affected, with particular regard to the legally defined protected characteristics²:

Age; Disability;

Sheltered and ECH Tenants are mainly frail elderly. Tenants have varying degrees of disability and/or care/support requirements. Many have significant health challenges with increasingly complex physical health needs and/or significant mental health needs. ECH also supports younger tenants with significant physical and/or mental health needs or disabilities. Approximately 20% of tenants are under 60 years of age.

Approximately 89 % sheltered and ECH tenants are over 60 years old, approximately 51% female, 49% male, approximately 70%+ with stated disabilities at any given time. Many (without stated disability) we can assume to be frail elderly who may also have a range of health needs.

3 People and Service Area who are delivering the policy/service/decision:

Property and Development – Asset Management and Property Services
Housing Services – Supported and extra care housing and One Teams

² For protected characteristics, please visit:

<http://www.equalityhumanrights.com/private-and-public-sector-guidance/guidance-all/protected-characteristics>

Equality Impact Assessment Form and Action Plan

Expand boxes as required. Guidance notes are stored - TDBC link:

<http://portal/sites/policyPerf/strategyandpartnerships/equality/Equality%20Impact%20Assessment%20GuidanceTemplate/Forms/AllItems.aspx> WSC 'W' drive: W:\Equalities\EIA TEMPLATE

<p>4 Evidence used to assess impact: <i>Please attached documents where appropriate.</i></p> <p>Engagement:</p> <ul style="list-style-type: none"> • Informal feedback received from the Supported Housing Development Group over the course of 2015-16 culminating in a formal workshop on 07.06.16 which provided detailed input into all areas of the standard • Feedback received from TDBC's Tenant Forum on 09.08.16 and subsequent follow-up <p>We considered national guidelines and good practice, property review and advice from Savills, survey results and scheme appraisal against the standard, incorporating specialist advice from our disabled facilities grant teams and an occupational therapist.</p> <p>On balance we consider that the positive impact of improving our sheltered and extra care housing stock supports accessibility issues and makes the properties more flexible to meet changing needs and deteriorations in health as tenants grow older.</p>
<p>5 Conclusions on impact of proposed decision or new policy/service change:</p> <p>The proposed changes will apply across sheltered and extra care housing. No tenants will be disadvantaged by improvements over time, in fact they will have more suitable and more accessible housing. No tenants will be disadvantaged by stock rationalisation which will take place only on relet (or earlier if an over 60 year old general needs tenant or couple requires and chooses the sheltered service sooner to better meet their needs). As such no potential discrimination amongst the protected groups has been identified.</p> <p>Sheltered and extra care accommodation is protected from the Right To Buy in that it is specifically provided for older people or those with specific support needs. Tenants in general needs accommodation which is targeted for re-designation to sheltered</p>

Equality Impact Assessment Form and Action Plan

Expand boxes as required. Guidance notes are stored - TDBC link:

<http://portal/sites/policyPerf/strategyandpartnerships/equality/Equality%20Impact%20Assessment%20GuidanceTemplate/Forms/AllItems.aspx> WSC 'W' drive: W:\Equalities\EIA TEMPLATE

housing at relet will, if eligible, retain their right to buy for the life of their tenancy in that property. Right to buy will no longer apply once the property has been redesignated to sheltered housing on relet. Therefore, there will be no disadvantage in relation to the right to buy for general needs tenants where the property is due to swap to sheltered accommodation.

No negative equality impacts have been identified as a consequence of the proposed changes.

6 Recommendation based on findings. These need to be outlined in the attached action plan.

There will be no adverse equality impact on the protected groups identified as a consequence of the proposed improvements and stock rationalisation in sheltered and extra care housing. Recommended that proposals can continue subject to approval.

Equality Impact Assessment Form and Action Plan

Expand boxes as required. Guidance notes are stored - TDBC link:

<http://portal/sites/policyPerf/strategyandpartnerships/equality/Equality%20Impact%20Assessment%20GuidanceTemplate/Forms/AllItems.aspx> WSC 'W' drive: W:\Equalities\EIA TEMPLATE

Equality Impact Assessment Action Plan					
Group Affected	Action required	Expected outcome of action	Person to undertake action	Service Plan - for monitoring	Expected Completion date
Age	N/A	N/A	N/A	N/A	N/A
Disability	N/A	N/A	N/A	N/A	N/A
Gender Re-assignment	N/A	N/A	N/A	N/A	N/A
Marriage and Civil Partnership	N/A	N/A	N/A	N/A	N/A
Pregnancy and Maternity	N/A	N/A	N/A	N/A	N/A

Equality Impact Assessment Form and Action Plan

Expand boxes as required. Guidance notes are stored - TDBC link:

<http://portal/sites/policyPerf/strategyandpartnerships/equality/Equality%20Impact%20Assessment%20GuidanceTemplate/Forms/AllItems.aspx> WSC 'W' drive: W:\Equalities\EIA TEMPLATE

Equality Impact Assessment Action Plan									
Group Affected	Action required			Expected outcome of action		Person to undertake action	Service Plan - for monitoring		Expected Completion date
Race ³	N/A			N/A		N/A	N/A		N/A
Religion and Belief	N/A			N/A		N/A	N/A		N/A
Sex	N/A			N/A		N/A	N/A		N/A
Sexual Orientation	N/A			N/A		N/A	N/A		N/A
Rurality	N/A			N/A		N/A	N/A		N/A
Author's Signature:	Jan Errington			Ref/Report Title:	Updated Extra Care Housing Option Report	Date:	13.04.16		EIA Version:
Contact Details:	Tel:	01823 356399		Extn:	2392		Email:	j.errington@tauntondeane.gov.uk	

³ Including ethnicity, national origin, colour, nationality, gypsies and travellers.