



Championing quality housing and
support for our ageing population

Independent Living Benchmarking Report

November 2025

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Appendix 1 – HA – Northern Ireland

Housing Association in Northern Ireland

Age of residents: Standard 60+ which can be reduced to 50+ if difficult to let. Whilst we have had younger tenants who may have different lifestyles to the stereotypical sheltered tenant there have been no dramatically noticeable changes.

Service Description: Category 2 sheltered housing – independent living with onsite scheme coordinator with the number of hours worked dependent on the size of the scheme. 3 resident Coordinators live on site but will change when staff retire. Cover provided by other staff. No review of service planned.

Housing Stock for older people

Property Type	Number of units
Bedsit	
1 bed	599
2 bed	115
1 bed bungalow	130
2 bed bungalow	57
Total	901

Managing the quality of the service:

Housing Officers quarterly

Housing Executive 2 schemes per year assessed, including paperwork and staff/tenant engagement.

STAR survey for overall satisfaction.

Allocations:

Northern Ireland Housing Executive common selection scheme. Problems with information provided and unsuitable allocation, although Fundamental Review of Allocations underway.

Assessing New Tenants:

Assessment carried out by NIHE, with pre tenancy questionnaire and informal observations at viewing to review mobility and capacity to evacuate.

New tenant visits carried out by Housing Officers.

Additional Comments:

We are running the support service provided by scheme coordinators at a growing loss due to the shortfall in funding from the Supporting People programme.

Rents and Service Charges 1 person, 1 bed flat

Rent	£80.14
Rates	£10.04
Service	£27.72
Support	£11.25
Total weekly charge	£129.15

Management Charges: Approximately 10%

Service Charge Caps:

Schemes which are in deficit on services were capped at 20% or the increase necessary to breakeven, whichever was lowest.

Staffing:

Scheme coordinators – are onsite on sheltered schemes for a varying number of hours and for larger schemes, 30/40 units the hours would be on average 30 per week.

Daily welfare calls are completed, annual support plans and risk assessments, providing weekly social activities, assistance with reporting repairs, etc. No further support available.

Staff Recruitment and Retention:

We have had difficulty attracting scheme staff and have in recent years utilised a recruitment agency who have been extremely helpful in sourcing suitable candidates. This however comes at an increased cost.

Supporting People funding: Yes, but a significant deficit

Challenging Behaviour/ASB:

We have seen an increase in challenging behaviour and ASB in sheltered schemes. Many incidents can be related to poor mental health and addictions, particularly alcohol misuse. We have had attempted suicides which can be very traumatic for scheme staff to deal with at the time and also very upsetting for other tenants. We have several tenants who we would consider may lack the capacity to live independently however this can be a difficult process working with colleagues in health to either get a diagnosis or find other more suitable accommodation. Alcohol use and misuse have risen in recent years in schemes which can be very challenging when the behaviours and lifestyle of some tenants impact on others. In several cases where alcohol misuse is prevalent, property condition can deteriorate where staff are left with no options to take enforcement action via the tenancy agreement. Neighbour disputes and fall outs among tenants can also be extremely challenging for front

Cleaning:

Mostly directly employed, with some contract cleaners. Average 3 or 4 hours per day, usually 3 days per week.

Heating:

In the vast majority of sheltered schemes, the communal heating system is gas and is paid for through services charges.

Community alarm monitoring: Radius Connect 24

Alarm Equipment/Digital Switchover:

We have been liaising with Tunstall on their progress of their digital converter boxes which are currently in the final phase of testing. A further meeting is being arranged in October with other housing providers in NI to discuss the way forward.

Grounds Maintenance:

Contractors are employed. Our current Grounds contractors are a social enterprise called Outwork.

Resident Involvement:

In each sheltered scheme we hold annual Time 4 Tenants meetings where senior staff from Housing and Maintenance teams meet with tenants to discuss any concerns.

Scheme Activities:

Generally, most schemes provide weekly coffee mornings as a minimum. From scheme to scheme it can vary depending on the interests of tenants, some scheme have weekly arts and crafts groups, lunch clubs, fish and chip nights and knit and natter groups, etc. Many schemes hold an annual BBQ for tenants and bus excursions.

Scheme coordinators organise many of the activities although in some schemes there can be some active tenants who take on more of a role in organising for example knit and natter groups.

Pets Policy:

We have recently developed our first pet policy which sets out the conditions for permission being granted to keep pets and the expectations for owners. We do permit tenants to keep pets although the size, type of pet, type of property and capacity of the tenant to look after a pet will be considerations before permission is granted.

Infestations:

None

Decarbonisation and Net Zero:

We have installed solar PV panels on 2 schemes with a further 3 to be completed in the coming year. The electricity generated onsite can be used to offset the energy costs for communal areas. It is hoped that these may result in reduced service charges for tenants in the longer term.

We have completed a pilot hybrid heat pump installation in 2 bungalows. Initial results suggest that we are unlikely to pursue this due to the age and composition of our stock, feedback suggests these initiatives may be best utilised in newer accommodation.

We have carried out loft insulation upgrades to all bungalow properties in the last 2 years. We are carrying out surveys of cavity wall insulation with a view to extracting and replacing as necessary.

These initiatives are not likely to relate directly to rental increases/decreases.

Communal Lounges:

Occasional anti-social behaviour for example lone drinking in the common room or use by groups of people outside staff working hours. We have problems with groups of tenants using the space which can alienate others within the scheme.

We have had tenants who are incontinent damaging communal chairs and furniture. We have also had to lock some communal kitchens due to items going missing regularly.

We don't have any specific guidelines on the use of common rooms, however in our new tenant handbook we will highlight intended uses for the common rooms.

Guest Bedrooms:

Charges apply for guest room use where they are available in sheltered schemes. In our recently updated Guest Room Policy, charges are £13 per night for an ensuite room where available and £10 per night for a standard guest room.

White Goods:

White goods are provided in new general needs wheelchair properties only. Beyond manufacturers warranty, Alpha will maintain any built-in cooker/ovens. All other white goods will thereafter become tenant responsibility.

Mobility Vehicles:

We have just recently drafted a new Mobility Scooter Policy which includes all types of e-vehicles. The policy covers restrictions on charging, for e.g. not in communal areas, no overnight charging, vehicles stored outside the scheme if possible, and clearer parameters on seeking permission and what exclusions may apply to the types of vehicles allowed.

Appendix 2 – HA – Northern Ireland

Housing Association in Northern Ireland

Age of residents: Minimum of 60. The age profile is getting younger. People are considering this type of housing from 60 on, particularly single men, divorce seems to be impacting on this trend.

Service Description: Scheme based Category 2 sheltered housing. HA encourage social inclusion and an independent life for frail and lonely older people within an affordable, supportive, safe and secure environment. We follow the Abbeyfield Guiding Principles

Housing Stock (includes supported sheltered houses)

Property Type	Number of units
Bedsit	119
1 bed	84
2 bed	3
1 bed bungalow	7
2 bed bungalow	2
Total	215

Managing the quality of the service:

To manage and maintain the quality of service we carry out daily, weekly and monthly checks including fire systems, emergency lights, water systems, warden call system, hygiene checklist, Health and Safety checklist, Managers monthly checklist, Property Manager regular checks. The records for these checks are reviewed by Scheme Supervisors and Housing and Support Manager. Supporting People carry out inspections. The Chief Executive reports to the Board. We complete an annual return to the Department for Communities. Tenant and resident meetings held, satisfaction surveys required by Housing Regulator every two years.

Erosch Independent Living Standards Accredited.

Allocations:

Northern Ireland Housing Executive common selection scheme. All properties are choice-based lettings. Demand for Sheltered Housing Schemes remains consistent and have a high occupancy rate.

Assessing New Tenants:

When a property becomes vacant those on the Northern Ireland Housing Executive waiting list with the highest points and who have expressed an interest in that scheme are invited to multi viewings and the property will be offered to the tenant with the highest points. The Supported Sheltered Houses have a different process.

Rents and Service Charges

	Rates Charge	Rent Charge	Service	Support	Total
1 Bed Flat	8.23	86.46	23.39	12.31	130.39
2 Bed flat	9.62	101.03	26.44	14.01	151.10
2Bed bungalow	9.78	102.72	23.64	11.92	148.06
1Bed bungalow	9.46	99.42	23.64	11.92	144.44

Management Charges: None

Service Charge Caps: None

Staffing:

Sheltered Housing has 2 Scheme Supervisors and a Relief Scheme Supervisor, reporting to Housing and Support Manager – staff are onsite on sheltered schemes on weekdays for a varying number of hours and per day.

Daily calls are completed, support plans, social activities, lunch clubs and careline pendants. Supported Sheltered Houses have on site staff daily, including staff sleep over at night and meals provided.

Staff Recruitment and Retention:

Since Covid we have experienced many challenges with recruitment. We have amended job titles and job descriptions to encourage more appropriate applications and so far, this has proven to be more successful.

Supporting People funding: Yes

Challenging Behaviour/ASB:

We have not seen an increase in challenging behaviour and ASB in sheltered schemes.

Cleaning:

Sheltered Houses: In 2 schemes cleaning staff are employed directly. In the larger scheme 7 hours per day, 2 days per week and in a small scheme 4 hours 1 day per week.

The third scheme is cleaned by contractors 6 hours per day over 2 days.

Heating:

Houses have a mixture of oil and gas-fired communal heating systems which provide heating to both the rooms and communal areas. At present there is no scope to change heating systems within our stock but due to geographical locations this may not be possible. In this case we would investigate if an alternative system like Heat Pumps could be installed to provide heating for the house. The communal heating system is earmarked for removal and individual boilers to be installed.

Community alarm monitoring: Radius Connect 24

Alarm Equipment/Digital Switchover:

The Association is currently on a roll out of fibre upgrades to Houses where analogue internet systems are installed. This project is dependent on the infrastructure contractors being able to install connections to the house internally and externally,

We are also upgrading lift call systems to sim only devices where there is no scope to add/change existing copper phone infrastructure to the units. This will ensure that any emergencies are always addressed.

The Association is reviewing warden call systems with provider to ensure that systems are compatible with digital switch over and will action appropriately.

Alarm suppliers are varied due to different ages of installed however all are hardwired systems. When carrying out future refurbishments of systems the Association will consider if wireless systems can be installed, however budget restraints will be a factor in final decision making.

Grounds Maintenance:

Grounds maintenance is provided by 3rd party contractors to all houses; however, the Association is reviewing current contract and will carry out a procurement exercise for new contract. Association residents in some houses do carry out some light gardening matters but are mainly based on planters etc; no machinery /tools used.

Resident Involvement:

Residents/tenants are regularly consulted and involved in decision making from redecoration choices, menus, activities, celebrations etc. Staff hold regular resident/tenant consultation meetings, discuss on a personal basis when completing Support Plans, and encourage participation in satisfaction surveys. NHF doesn't cover Northern Ireland and equivalent body, NIFHA doesn't have an equivalent standard.

Scheme Activities:

Community engagement Manager produces a monthly events calendar which includes resources, activities and actions. Staff and volunteers use this as a basis for activities in both Sheltered and Supported Sheltered housing and will include games, word searches, quizzes, reminiscence, crafts etc. She also provides information from local councils and community organisations that is of relevance for residents/tenants to promote participation and connection with local events such as Men's Shed, Bowling Club, church groups. There are also regular activities such as coffee mornings, lunch clubs, services by local clergy, knit and natter, bingo etc. Residents/tenants are consulted and can choose what activities they would like to take part in. External groups such as Plays Aloud, musicians etc are also invited to entertain residents/tenants. We also have volunteers who provide additional community contact, activities and one-to-one engagement

Pets Policy:

If a resident/tenant wishes to have a pet they have to make a request to the Housing and Support Manager. Each request will be considered on a case-by-case basis taking into account issues such as the layout of scheme and suitability to house the pet in question. The potential nuisance to other tenants, whether there are any Health & Safety issues. The ability of the tenant to care for the pet. Plans in place in event of tenant being hospitalised

or becoming incapable of looking after the pet. It must be discussed as part of housing pre allocation process what arrangements are in place should the pet outlive their owner. Pets are not allowed in any areas where there is food nor in communal areas unless pre-arranged with the Housing and Support Manager. It is the tenant's responsibility to remove all pet waste and full pet insurance must be held by the owner and the pet must be kept under control at all times and have the appropriate day to day health care. Tenants must not leave their pets in the property when they are away, and tenants must ensure that pets do not cause damage to the property if they are left unsupervised. The scheme supervisors are responsible for ensuring the day-to-day management of pets within the scheme and the safety of other tenants and staff. The Housing and Support manager can remove permission to keep a pet if they are not managed properly

Does your approach cause any difficulties?

The Housing and Support Manager is very clear about the rules for having a pet and will react promptly to any breaches of the rules and this approach appears to work.

Infestations:

None

Decarbonisation and Net Zero:

At present there are no planned works towards decarbonisation however an updated environmental strategy due in 2025-26 may change the priorities. How this would affect future rents would depend on the grant infrastructure available to fund it. It would be our desire not to have to pass on the costs through rent.

Communal Lounges:

Within Supported Sheltered Houses and Sheltered Schemes there have been very few issues with the communal lounge. The resident/tenant handbook, courtesies, and good neighbour agreement explains that the communal lounge is for residents to share with their fellow residents. This is their home, so they are always consulted if anything is being organised such as an event in the lounge. External groups are not permitted to use the lounge unless staff are on site.

Guest Bedrooms:

1 guest bedroom in 1 sheltered scheme which is very rarely used and the charge per night is £10 which goes into the scheme account.

White Goods:

Sheltered Housing - White goods are provided in communal areas, such as laundry equipment and kitchens.

Mobility Vehicles:

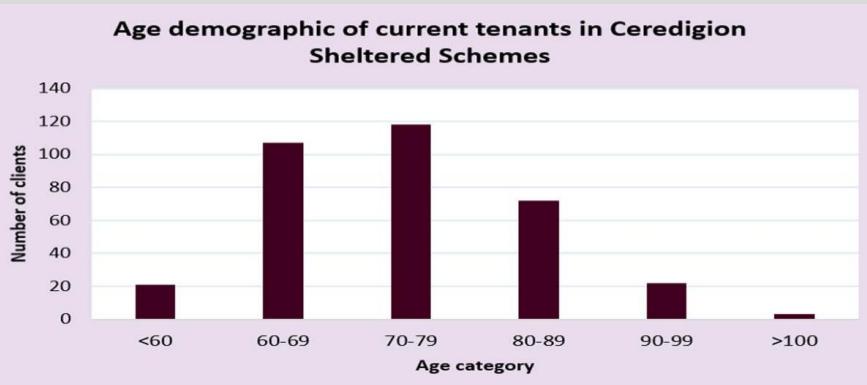
Prior to acquiring a mobility vehicle, which is to be stored at the house or scheme, permission must be sought from the Housing and Support Manager and agreed by the Property and Development Manager. Each case is considered on a case-by-case basis taking account of the layout of the house/scheme, whether there is somewhere suitable to store and charge the vehicle and whether there are any potential issues around health and safety,

building regulations, fire safety or nuisance hazards. If the vehicle is charged using the communal electricity supply a monthly contribution to the cost of the electricity may be requested. Residents and tenants must provide a copy of their insurance policy to prove they have appropriate liability insurance to cover damage to buildings, or injury involving other residents/tenants, staff or visitors. All mobility vehicles will be subject to Portable Appliance Testing (PAT) tests. Failure in testing must be made good by the tenant at their own costs.

Appendix 3 – HA – Mid and West Wales

Housing Association in Wales

Age of residents: Standard 55+ and 50+ for 2 schemes due to historic low demand. There has been an increase in specific age-related issues e.g. poor physical health and dementia, they can also face numerous other issues e.g. substance misuse, poor mental health and difficulty in tenancy sustainment. The tenant profile has changed in respect of an increase in the number of single male tenants. Another concern is unplanned/ unsafe hospital discharge and an increase of unsupported/unsupervised residents housed with complex needs.



Service Description: Scheme based with a Scheme Coordinator at each scheme, delivering Comprehensive Support Services to Individuals Aged 55+ in HA's Sheltered HA is dedicated to delivering high-quality, person-centred support, including addressing diverse and multi-faceted needs such as dementia, poor mental health, substance misuse, physical disabilities through dedicated, bilingual and trained on-site scheme coordinators.

Housing Stock for older people

Property Type	Number of units
Bedsit	5
1 bed flat	267
2 bed	54
1 bed bungalow	78
2 bed bungalow	512
Total	916

Managing the quality of the service:

Monthly meeting between HA and Local Authority to discuss complex contract holders and any scheme issues including any MDT or safeguarding referral. Also, reflective practice and regular supervision with staff and team meetings.

HA employ a Full time Supported Housing Coordinator that's 100% funded by Housing Support Grant.

Star survey results November 2024 - direct feedback from service users

STAR % Satisfaction Rates	% 2021	% 2024	Trend
Overall service provided by Scheme Coordinator	92	95	up
Ease of access to all areas of your home and scheme	93	93	same
Frequency of contact with Scheme Coordinator	91	93	up
Response when using pull cord /emergency call system in office hours	-	91	New question
The facilities at your scheme	89	90	up
Response when using pull cord /emergency call system during out of office hours	-	86	New question
The activities held at your scheme	80	78	down

Allocations:

HA Housing Officers shortlist from Common Housing Registers which HA fund the Local Authority to administer.

Due to lack of demand particularly in Sheltered Schemes, specific referrals are received from the Local Authority that become Inappropriate housing allocation with a root cause of:

- Mental health and safeguarding issues
- Support which was promised by providers

Assessing New Tenants:

A Pre-let- checklist was jointly developed by HSG and the Scheme Coordinator team. and the Scheme Coordinator is invited to pre tenancy viewing.

There have been many examples of difficulties moving in, for example poorly planned transition from residential care, hospital discharge, identification of equipment to assist with sensory issues and other disabilities.

Additional Comments:

An older person's strategy is being created and will be presented to Board.

Rents and Service Charges

Property Type		High- EPC A	Average
Bedsit			
1 bed flat		£ 86.91	£84.41
2 bed flat		£96.29	£97.79
1 bed bungalow		£96.29	£93.79
2 bed bungalow		£119.09	£116.59

Total Service Charges – Older persons

Property Type		Low			High		Average		
Bedsit		n/a			n/a				
1 bed flat		£21.10 pw			£35.26pw		£27.37		
2 bed flat		£21.66			£34.29		£28.40		
1 bed bungalow		£4.80			£19.05		£11.96		
2 bed bungalow		£4.80			£4.95		£4.88		

Type	Grounds	Cleaning	Heating	Lifts	Electricity	Scheme staff	Laundry	Comm alarm	Other Non HB Heat Water
Bedsit									
1 bed	0.92p	£4.26	£3.13	0.56p	£4.69	£5.54	£1.10	0.73p	£9.24/£3.88
2 bed	0.92p	£4.26	£3.13	0.56p	£4.69	£5.54	£1.10	0.73p	£11.64/£3.74
1 bed bung	0.51p	0.31p	0.12p	0.00	0.20p	0.27p	0.06p	0.03p	N/A, pay direct to own providers
2 bed bung	0.51p	0.31p	0.12p	0.00	0.20p	0.27p	0.06p	0.03p	N/A, pay direct to own providers

Management Charges: 15%

Service Charge Caps:

None to date - No service charges are currently being capped, however if the cost of a service charge were to become very high, we would look to cap, for example utilities

Staffing:

Each of the 9 Ceredigion Sheltered Schemes have a full time permanent designated Scheme Coordinator. On costs Each coordinator is based within an office within each Scheme.

Housing Support Grant fund 70% of the Scheme Coordinator cost for the support element of the role the remaining 30% Housing Management cost is recharged to contract holders via Housing Benefit eligible Service Charge as each of these units of accommodation are exempt properties for Housing Costs.

HA have an internal team for Complex Benefit Support that Scheme Coordinators can work alongside to support, undertake Home Fire Safety checks on behalf of the Fire Authority. There are also a wide range of external agencies where referrals can be made, including:

- CPN - supporting extremely vulnerable tenants in crisis, following referral.
- Successful examples of accessing volunteering opportunities eg Ty Hafan
- Older Adult Mental Health Team – Running “Cake and Clonc” at Sheltered Schemes for people with Dementia and their extended families
- Identifying physical needs and referrals to Occupational Health and Physiotherapy
- Local Authority - MARF for hoarding and associated complications for the tenant
- Housing Benefit / DWP – associated benefits including tackling fuel poverty, enhancing overall tenant wellbeing and financial stability
- Local Authority Community Connector Service – as part of the Ageing Well Forum
- General Practitioners and District nurses – early intervention to negate health crisis for tenants

- Assist Contract holders to apply for alternative accommodation via the Common Housing Register using the HA funded (no recharge to scheme tenants) in-house Scheme Computer provision
- CAVO - sourcing “ageing well” grants to fund exercise classes within Scheme’s

Staff Recruitment and Retention:

No challenges with bilingual staff recruitment and retention as HA have great terms and conditions of Employment including flexible working hours for the needs of the business.

Housing Support Grant funding:

Yes, Fixed 4 year with an option of 2 years contract with Housing Support Grant for 70% salary cost of 9 sheltered Scheme coordinators plus 100% fund a Full time Supported Housing Coordinator

Challenging Behaviour/ASB:

Yes indeed – e.g. 34% of the ASB cases involve over 55's who arguably would have benefitted from a more intensive supported environment

HA are dealing with a few serious cases of ASB, and involve criminal activity / legal action as well as more general ASB issues

ASB driven by substance / alcohol abuse by either the contract holder and / or their visitors

Root cause reasons:

- Mental health and safeguarding issues
- Support which was promised providers tenants are allowed to decline

We have been successful in one recent injunction for sexually motivated activity by a contract holder on a sheltered scheme.

We are in the process of progressing two repossession cases, within a Sheltered Scheme.

Cleaning:

Mix of internal and contractor, with cleaner retention and recruitment internally or externally is an issue for this role. Value for Money within this service is a concern to tenant with ever increasing rechargeable operational costs. Typically, between 3 and 10 hours per scheme per week.

Heating:

A mix of gas, oil and electric, with no plans to change.

Community alarm monitoring: Delta Wellbeing

Alarm Equipment/Digital Switchover:

Options appraisal concluded – after consultation with Tunstall telecom and internal stakeholders. The conclusion is a Programme of work underway to upgrade the Sheltered

Schemes to a digital platform. As the community pendant alarms were not compatible for digital upgrade.

As part of the options appraisal, HA are not looking at removing the remaining hardwired systems be it Tunstall or Chubb equipment.

Grounds Maintenance:

Contractors are employed.

Resident Involvement:

A quarterly sheltered forum is held within a Central Scheme where HA arrange and fund transport. All scheme tenants are invited to come together for a morning to engage in activity and received speakers etc – currently 35 attend each forum.

Yearly face to face consultation meetings between HA officers and tenants reviewing scheme service charge.

A third of the Schemes have a designated tenant's group which have managed to secure lottery funding in the past

Programmed meetings with Tenant Participation officer at each scheme.

Scheme Activities:

Each scheme has activities that are agreed by the tenants. Some have internal fundraising to cover costs; some are funded ad hoc by the people attending. HSG have as part of the grant allocated £2k per scheme that supports events and activities that include the wider community.

Pets Policy:

If a new Contract Holder moving into sheltered accommodation has a dog or cat living with them before moving into the sheltered accommodation, the pet will be allowed to live with the Contract Holder until the end of its life. Upon the death of the pet, consent to replace with another dog / cat is unlikely to be granted. However, this may be reviewed on a case-by-case basis.

Infestations:

Consultation on an enhanced "Seagull" management scheme is currently being undertaken at one scheme

The Scheme Coordinator identified a flea infestation within a flat whilst tenant was in respite. After some negotiation the tenant agreed for a specialist contractor to attend to deal with the infestation prior to the tenant returning home – Tenant paid for this

Decarbonisation and Net Zero:

Historic upgrade of communal lighting has facilitated a well-received reduction in the rechargeable amounts within the communal service charge.

A change of Communal boiler allowing Kerosene usage has also reduced the communal heating recharge.

HA have within two schemes based on tenant's request, installed a heat meter within their flats.

Communal Lounges:

Underutilizing in some schemes and over utilising by a community group in the other. Loss of items within some schemes nothing is taken from others although there are lockable cabinets within communal area.

- *Communal Scheme Lounges:* Hosting activities and events that reduce loneliness.
- *Inclusive Events:* Welcoming broader community participation

Wellness Programmed: Organising fitness classes, workshops, and wellness events tailored to tenants' needs

Guest Bedrooms:

Scheme consultation arranges a meeting between Tenants and HA officer in each Sheltered Scheme every 3 years to confirm whether they wish to retain the Guest Room and what the nightly charge would be. Currently all Ceredigion Schemes are charged at £10 per night and Powys Scheme is at £14.40 nightly charge.

Individual contract Holders within the schemes. that have a guest room, are asked what their guest room nightly charge would be. All generated income is recorded as income within the Scheme Service Charge schedule

White Goods:

There has been a piece of work to gift the tenants the white goods however we are unable to gift the white goods that are inbuilt into the kitchens; therefore they are maintained by HA on a current non rechargeable basis.

Mobility Vehicles:

Over half of our Schemes have a designated mobility scooter store. There is a process in place to apply for a space to store and there is a weekly charge of 68p. Currently there is no active waiting list and although there is a procedure in place the policy is under review.

Appendix 4 – LA in Wales

Local Authority in Wales

Age of residents: Minimum of 60. No real change in the age profile.

Service Description: Scheme based. The Council older persons accommodation is specifically designed and built with the needs of older person in mind. The service aims to provide an environment to help prevent social exclusion and loneliness, live independently and age well in place. The Council provides affordable and secure housing for older people, with high quality accommodation with a full 24/7 wrap around service to help provide responsive housing support. Its Service Aims/Objectives are:

- Promote Independent Living: Enable older persons to live independently for as long as possible in safe, accessible, and comfortable housing.
- Ensure Safety and Wellbeing: Provide a secure environment with appropriate support services to maintain physical and mental wellbeing.
- Deliver Person-Centred Care: Tailor services to individual needs, preferences, and cultural backgrounds.
- Encourage Social Inclusion: Reduce isolation by fostering community engagement and social activities.
- Support Transitions: Assist residents in transitioning between levels of care or accommodation as their needs change.
- Maintain High Standards of Service Delivery: Ensure compliance with housing regulations, safeguarding policies, and quality assurance frameworks.

Housing Stock for older people

Property Type	Number of units
Bedsit	10
1 bed	315
2 bed	39
1 bed bungalow	0
2 bed bungalow	0
Total	364

Managing the quality of the service:

To manage and maintain the quality of service there are several key areas, including Governance and Compliance, Staff Training and Supervision, Resident Feedback and Engagement, Performance Monitoring and Partnership Working. These include audits, staff appraisals, satisfaction surveys, KPI's. The Business Development Team and Community Living Co-Ordinators take a lead role.

Erosch Independent Living Standards and RNIB Cymru Visibly Better Accredited.

Allocations:

Everyone is assessed under the same criteria, regardless of vulnerability or routes into housing. Challenges include assessment criteria not aligning with current priorities. This causes issues with unsuitable decisions at time of offer. Needing Community Living is not a

priority on its own - the need is still assessed under bands in the Allocations Policy. No current plans to do any further review on the arrangements.

Assessing New Tenants:

There are pre tenancy checks on the application form, housing need and conviction checks, HOC do pre tenancy checks, the offers are checked with tenancy and asb. There is a welcome visit approx. 6-8 weeks after signing up. The main purpose of the visit is to confirm residents have moved in and they are often completed over the phone (eg if a calling card is left and resident calls back in response). Scheme managers also visit the resident to ensure all necessary paperwork is completed including PEEP, referrals, financial support etc. Tenancy Sustainment do a vulnerability check to make sure we have all the info from HOC and there is a new tenant visit 6/8 months in as well.

Rents and Service Charges

1bed flat – Description	Rebateable Ind	Rent Value
ALL PROPERTY CLEANING CHARGE	Y	0.62
Building Access control/security	Y	1.05
ESTATE MAINTENANCE - GROUNDS & PESTS	Y	1.98
FLAT SERVICE CHARGE - DOOR ENTRY SYS	Y	1.31
DISCRETIONARY REPAIRS	Y	2.87
Net rent for property	Y	110.04
SERVICE CHARGE (NON REBATABLE)	N	14.05
COMM. ALARM - SHELTERED UNIT	N	2.9
RETIREMENT COMPLEX - CLEANING	Y	11.5
Communal maintenance	Y	7.9
Sheltered Fire & Safety Checks	Y	2.76
Scheme management - sheltered/hostel scheme	Y	15.4
SHELTERED HSG SERVICE CHARGE (REBATABLE)	Y	8.96
WATER CHARGE	N	5.27
	Total	186.61

Management Charges: None

Service Charge Caps: No more than £10 increase each year – reviewed annually.

Staffing:

Structure: Older persons accommodation manager x 1 – 0 hours daily, Community Living manager x 1 – 1 hour daily, Community Living co-ordinator x 2 – 5 hours daily, community living scheme mangers x 14 - 8 hours daily. Level of support provided includes:

- **Conduct welfare calls** – *checking on tenants, ensuring tenants are fit and well – often tenants are unwell and are unable to contact GP, in situations like this, SM will contact GP/Ambulance service/NOK or in more dire situations, tenants have passed away or require emergency first aid*
- **Undertaking PEEPs to ensure health and safety of tenant** – *writing an evacuation plan for individuals in the event of an emergency*
- **Health and safety of building** – *ensuring all health and safety checks are conducted daily, ensuring fire risks are minimised *93% are false fire alarms in sheltered housing. H&S also includes the management of guest rooms*
- **Referrals** – *Dependant on individual needs or concerns, referrals to co-dependants/partners – this can include ASB/ Tenancy/ Sustainability/ safeguarding/ money advice/ adult services/ health/ charities*
- **Supporting Tenants when moving in/out/management transfer** – *helping and assisting when tenants are new to the scheme, providing orientation and onboarding, providing general advice and assistance ensuring maximisation of income*
- **Assistance when tenants have falls, accidents or any other incidents** – *require first aid/ambulance or reassurance and comfort*
- **Fires** – *ensuring fire alarm checked weekly, any issues reported and monitored. False alarms are followed by a visit to tenants to ensure fire safety and to provide advice and assistance to ensure no underlying issues*
- **Extra support** – *if tenants are feeling unwell, extra support provided in terms of prescription requests/medication pick up, rubbish removal, laundry, gp/hospital appointments/meals/intermittent personal care*
- **Reporting of repairs** – *both individual and communal*
- **Running and managing events and activities to alleviate social isolation and loneliness** – *these events and activities are themed around health and wellbeing, financial information and advice, preventative advice and support. In the month of September, 795 tenants attended events and activities in schemes*

Staff Recruitment and Retention:

No challenges in staff recruitment and retention. Staff who have joined have stayed within the service and there is a demand for people wanting to join the service.

Supporting People funding: Yes

Challenging Behaviour/ASB:

Yes – challenging behaviours from residents with alcohol or drug abuse, some neurodivergent issues emerging, ASB from residents' family members. Impact it has on service means intensive management and support for all involved, partnership working, reliant on partners for support, residents may feel like they aren't always being listened to.

Cleaning:

Staff carrying out cleaning are employed by housing services caretaking team within the council. On average on site 6 hours per day at each scheme.

Heating:

4 schemes have individual boilers – remaining 7 have communal boilers. There are no current plans to change the type of heating provided at the 4 schemes.

Community alarm monitoring: Cardiff Telecare.

Alarm Equipment/Digital Switchover:

All schemes are digital, using Appello.

Grounds Maintenance:

Council Parks service carries out grounds maintenance.

Resident Involvement:

Resident involvement includes daily feedback, consultation on matters affecting them, decision making on colours/furniture/activities. Residents' meetings held ad hoc.

Scheme Activities:

There is a minimum of 2 events per scheme each week. In the month of July 2025, there were 105 events across all schemes with almost 1000 attendees. Work with Public Health Wales, and internal departments who support some events.

Pets Policy:

Responsible pet owner agreement – 1 cat or dog is allowed. Dogs are not allowed off lead within the communal areas of the scheme and no animals in the communal rooms. No issues.

Infestations:

Occasional cockroach infestation in 1 scheme – work with Councils pest control team – no bed bug issues. Occasional, rat or mice issue – council pest control team manage. This is paid for by community living budget. On occasion, adult services or tenancy management/sustainability may pay for treatment.

Decarbonisation and Net Zero:

No plans to decarbonise existing schemes. All new community living/Independent living schemes will meet the Welsh Government WDQR standards, and this also covers renewable technology and energy performance. New schemes will achieve an EPC A or a similar standard such as Passivhaus and are focused on a 'fabric first' approach – ensuring the building fabric is as efficient as possible. We no longer use individual gas boiler, specifying a renewable energy system such as air source or heat source with solar PV and battery storage instead. Some of our more recent schemes have used a communal ground source heat pump with underfloor heating which should be more affordable for our residents. Service charge for all new schemes is expected to cover all running costs so not subsidising any services.

Communal Lounges:

No challenges with communal lounges. Occasionally external groups are allowed to use the facility with written permission from Council and following consultation with residents.

Guest Bedrooms:

£10 per night – income is banked into overall budget for service.

White Goods: None

Mobility Vehicles:

All schemes have specific scooter/wheelchair storage and charging rooms.

Appendix 5 – HA in Wales

Housing Association in Wales

Age of residents: Minimum eligible age 50+ with medical need

We have seen an increase in younger residents apply for this type of housing, many new applicants are just over 50+ and some still in employment, many of our schemes are now seeing an influx of younger people take up housing as opposed to a few years back when the scheme was mostly for the older generation.

Service Description: Scheme Based, 6 Community Living Schemes pepper potted through the borough, each scheme consists of flats / bungalows communal lounges, laundry facilities and garden areas.

Housing Stock for older people

Property Type	Number of units
Bedsit flat	72
2 bed flat	4
1 bed bungalow	140
2 bed bungalow	2
Total	218

Managing the quality of the service:

Yearly Questionnaires, Monthly Residents Scheme Meetings, event/activity Feedback, communal improvements consultations, opportunities to join tenant groups to contribute to decisions/have your say.

Senior Community Living Partner undertakes supervision duties, 121 meetings, team meetings. Identifying training and development needs alongside our People Team who ensure mandatory training is completed.

Allocations:

Assessing New Tenants:

The Local Authority undertake assessments at application stage and place the applicant in the appropriate banding. We undertake affordability assessments prior to an offer of a property; a wellbeing assessment is carried out 3 weeks following move in and quarterly visits at a minimum for the first year of the new tenancy. However, it more likely that the new resident receives more regular interaction as our Community Living Partners are on site daily.

Rents and Service Charges

1 Bed Community Living Bungalow

Rent Per Week £95.67

Service Charge Per Week £22.86

2 Bed Community Living Bungalow

Rent Per Week £106.89

Service Charge Per Week £21.36

1 Bed Community Living Flat

Rent Per Week £79.01

Service Charge Per Week £26.87

2 Bed Community Living Flat

Rent Per Week £94.10

Service Charge Per Week £16.90

Management Charges:

Management costs are included solely within the Community Living Scheme charge, which forms part of the overall service charge. This amount is calculated as the lower of either the total management costs (including payroll, travel, and professional memberships) or 10% of the total Community Living Officer payroll costs.

Service Charge Caps:

A 70% cap is currently applied to utility and cleaning charges at our Community Living sites. This policy has been in place for several years and is subject to annual review.

A decision was made not to include firefighting equipment within the service charge, as we consider it our responsibility to ensure such equipment is readily available and properly maintained to safeguard the wellbeing of our tenants.

Maintenance cost of disabled adaptations e.g. stairlifts, hoists and through floor lifts - A decision was made to include equipment such as stairlifts, hoists, and through-floor lifts within our inspection and maintenance regime. This ensures the equipment remains in good working order and that cost does not become a barrier to tenant safety or their ability to live independently in their homes.

Staffing:

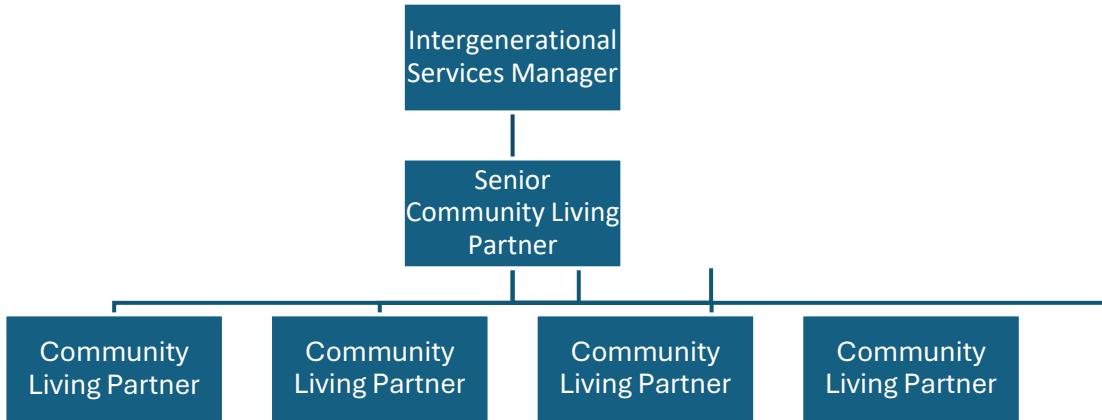
Intergenerational Services Manager oversees both older persons services and youth services.

Senior Community Living Partner provides leadership and support to the Community Living Partners and monitors the daily running of the schemes.

4 Community Living Partners provide a daily service to residents within each of the 6 Community Living Schemes.

The hours are generally broken down to a morning or afternoon scheme cover. Each member of staff delivers 30hrs per week.

We don't offer Floating Support within the community; however, our Housing colleagues do. The Community Living Partners offer low level support, such as, morning calls, wellbeing visits, safeguarding, sign posting, liaising with other agencies on the resident's behalf.



Staff Recruitment and Retention:

We seem to be attracting more applicants, possibly due to the change to a 4-day week. In terms of retention, we often receive feedback from colleagues who want to progress within the organisation and receive a better salary. In terms of improvements, HA want to get the best out of people at interview stages, therefore, we provide all candidates with the questions a day or two before the interview. This method ensures fairness and consistency, reduces anxiety and nerves, inclusion and accessibility, that align with our organisational culture.

Supporting People funding:

No SP funding is being received for our Community Living Service; however, our Housing and Support teams receive this funding and therefore provide housing related support to residents if required.

Challenging Behaviour/ASB:

There is an increase of challenging behaviour within the schemes. The majority of incidents relate to people with complex needs - substance misuse, addictions, physical and mental health needs. A stream of visitors visiting residents at unsociable hours which cause concern, suspicion and fear for members of the community. There has also been an increase in safeguarding concerns for our most vulnerable residents in terms of emotional and financial abuse.

Cleaning:

Cleaning is carried out by the Community Living Partner; this varies from site to site however I would estimate currently 6 hours per week.

Heating:

A Gas combi boilers are installed within our properties and communal lounges'. We have no plans to change the type of heating at present. mix of gas, oil and electric, with no plans to change.

Community alarm monitoring: Merthyr Tydfil County Borough Council

Alarm Equipment/Digital Switchover:

We have made the move and have become fully digital. We are currently using the Lifeline digital units.

We have chosen to remain with Tunstall services. We gradually installed the digital units over a period of months, ensuring it was fully operational and tested before removing the hardwired alarms from each property and communal areas.

Grounds Maintenance:

Currently HA has a grounds maintenance team who cut communal areas and open garden areas. Enclosed garden spaces (generally the rear garden) is maintained by the resident.

Resident Involvement:

Our residents have opportunities to join tenant forums, our democratic body (monthly meeting alongside employee's rep, tenant reps, CEO and exec team members) and can access TPAS Wales services. Residents also run their own constituted groups with support from staff and external agencies.

Scheme Activities:

Each scheme has a minimum of 3 activities each week. Most residents will organise the low-level type of activities themselves – bingo, coffee mornings, etc. The staff tend to organise events, such as, Christmas parties, day trips, etc. We work alongside a variety of organisations who deliver events/activities, such as, digital inclusion.

Pets Policy:

No Pet policy in High Rise Accommodation. Our self-contained bungalows and flats are permitted to keep pets. We have experienced negative feedback from residents in our high-rise building; however, this is clearly stated during the letting process and prior to an offer of accommodation.

Infestations: None

Decarbonisation and Net Zero:

Unknown at this time.

Communal Lounges:

Current challenges are that some schemes are utilised more by members of the community who are friends of the community living residents. One scheme in particular receives just a few residents and despite promoting events/activities residents don't want to attend. Sometimes this is due to younger residents (age 50+) work during the day and no facilities on offer during the evening. We have written guidelines for external groups to book the communal lounge; however, another challenge we face is availability during the day and obtaining/providing liability insurance has been a barrier for smaller external groups in the past.

Guest Bedrooms:

All been removed from our schemes.

White Goods:

None, other than communal.

Mobility Vehicles:

We have a motorised scooter policy. Residents must request permission preferably before purchasing, to enable our H&S Team to assess in terms of storage and safety requirements. We have a storage and charging facility within our high-rise accommodation with no direct charge to the resident. We have also installed outdoor electrical sockets and patio areas for some residents within another scheme of bungalows.

Appendix 6 – HA in Wales

Housing Association in Wales

Age of residents:

Minimum age 60+ with no plans to change this.

Service Description: Scheme Based

HA Sheltered Housing Service is all about helping people aged 60+ to live independently while feeling safe, supported, and part of a community. We provide self-contained homes with the reassurance of visiting staff, emergency alarm systems, and access to communal spaces where residents can connect with others.

Our aim is to enhance quality of life by offering the right balance of independence and support, whether that's through regular wellbeing checks, help with day-to-day concerns, or simply being there when needed. We work closely with health and social care partners to ensure residents' needs are met early, helping to prevent crises and promote long-term wellbeing. At the heart of everything we do is a commitment to dignity, inclusion, and helping people feel at home.

Our Sheltered Scheme Coordinators play a vital role in ensuring that residents in Sheltered housing feel safe, supported, and empowered to live independently. Their role is both practical and people-focused, acting as the main point of contact for residents, families, and external agencies. Coordinators carry out regular wellbeing checks, respond to emergencies, and help residents access the support they need. This can include arranging repairs, signposting to health services, or simply being a friendly, familiar face. They also help foster a sense of community by encouraging social activities and promoting inclusion. At the heart of the role is a commitment to dignity, respect, and helping residents maintain their independence for as long as possible in a secure and welcoming environment.

Housing Stock for older people

Property Type	Number of units
Bedsit	N/A
1 bed	525
2 bed	40
3 bed	9
1 bed bungalow	43
2 bed bungalow	9
3 bed houses	9
Total	629

Managing the quality of the service:

The role of the Scheme Coordinator is centred around two key areas: Building Compliance and Tenant Support. In terms of compliance, the coordinator is responsible for ensuring that

all health and safety checks, inspections, and statutory requirements are completed to a high standard. These are monitored monthly through key performance indicators (KPIs) to ensure quality and accountability. On the tenant support side, Coordinators carry out regular welfare visits and mandatory checks to ensure residents are safe, well, and supported in maintaining their independence. Both aspects of the role are underpinned by ongoing training and development, ensuring staff are equipped with the knowledge and skills to deliver a high-quality, person-centred service.

We have recently updated our Role Profiles for both Senior Scheme Coordinator and Scheme Coordinator and had them benchmarked.

Erosch Independent Living Standards and RNIB Cymru Visibly Better Accredited.

Allocations:

Our properties are allocated through Choice-Based Lettings, in partnership with the Local Authority and other Registered Social Landlords (RSLs). We're fortunate to have consistently high demand for our schemes and have not experienced issues with unsuitable nominations or falling interest. To maintain this strong demand, we actively promote our schemes within the community. We regularly host open events where local people can visit, meet staff and residents, and see first-hand what we offer. Our existing tenants are often our greatest advocates, and they frequently recommend our service to friends and family, which helps build trust and interest through word of mouth.

Assessing New Tenants:

We carry out pre-tenancy assessments for all prospective tenants, which have proven effective in helping us maintain balanced and supportive communities. These assessments allow us to understand individual needs and ensure that sheltered housing is the right fit.

Once a new tenant moves in, we provide regular follow-up visits, typically over a period of two to six weeks. This helps to ensure they are settling in well and to offer any additional support they may need. This approach has worked well for us, and while we continually review our processes to ensure they remain effective, we have not encountered significant challenges with the current arrangements.

Management Charges: n/a

Service Charge Caps: n/a

Staffing:

We manage 22 Sheltered Schemes and 9 Supported Schemes, with a dedicated team structured as follows:

Senior Scheme Coordinators: 3

Scheme Coordinators: 9

Relief Scheme Coordinators: 1.5 FTE

Scheme Cleaners: 15

Relief Scheme Cleaners: 1

Each Scheme Coordinator is typically on-site for a minimum of 22 hours per week. While we do not attend every scheme daily, we operate a weekly rota, which is shared with tenants, so they know when to expect staff presence. This approach helps reduce travel time and allows staff to spend more meaningful time at each scheme. In terms of allocation:

Each Senior Scheme Coordinator manages one scheme, including some of our Supported Schemes.

Six Scheme Coordinators manage two schemes each.

Three Scheme Coordinators manage three schemes each.

Support provided includes:

Two CARE (welfare) visits per tenant every six months

Four quarterly emergency equipment checks This ensures a minimum of six home visits per year per tenant. While we do not carry out daily scheduled calls, we do make welfare calls when concerns arise or additional support is needed.

Staff Recruitment and Retention:

Thankfully no challenges with staff recruitment. As mentioned, we have recently reviewed our role profile and salary award, however this was not linked to staff retention or recruitment issues.

Supporting People funding:

No SP, but all of our tenants are charged an Intensive Housing Management (IHM) service charge, which helps us recover eligible costs associated with the enhanced housing management we provide. This includes a proportion of staff salaries for Scheme Coordinators, as well as the costs of our Out of Hours support service and the emergency alarm system. These elements are essential to delivering a safe, responsive, and supportive environment for our residents.

Challenging Behaviour/ASB:

While we haven't seen a significant increase in the number of ASB cases, the nature and complexity of incidents have changed. Recently, we've dealt with reports involving unwanted sexual advances, inappropriate language, and hate-related behaviour. These types of incidents have had a notable impact on both residents and staff, particularly due to the communal nature of our schemes, where victims and perpetrators often share shared spaces.

In response, we are actively reviewing our approach through our "Live Well – Living Together" initiative, which focuses on promoting respectful behaviour, challenging outdated attitudes, and encouraging open conversations, particularly around issues such as language, boundaries, and male privilege. As part of this, we are planning a series of gender-specific sessions in January 2026 to create safe spaces for residents to discuss these sensitive topics.

One of the challenges we face is the reluctance of some external agencies, such as the police, to take action, often due to the age of the alleged perpetrator or concerns about the victim's ability to pursue legal proceedings. Additionally, older people may feel embarrassed or uncomfortable discussing sexual boundaries, which can make it harder to address these issues openly. Our aim is to break down these barriers, raise awareness, and foster a culture of transparency, safety, and mutual respect within our communities.

Cleaning:

Cleaning is delivered in-house as part of our Sheltered Housing team. We currently employ 16 Scheme Cleaners, who work across our 22 Sheltered Schemes. Some cleaners are responsible for more than one scheme, depending on the size and needs of each location. On average, cleaners are on-site for approximately 3 hours per day, Monday to Friday, ensuring that communal areas are kept clean, safe, and welcoming for residents and visitors.

Heating:

We are impacted by Heat Network Regulations. Our heating systems are under constant review, with the aim of updating to be more efficient and also to ensure our tenants are able to view and monitor their utility usage.

Community alarm monitoring: DELTA

Alarm Equipment/Digital Switchover:

100% completed at our Sheltered Schemes, we do however have a small number of bungalows that have dispersed systems that are due to be updated by 2026/27. We have Wireless Health Care Locate System, which operates on a wireless mesh, in addition we have Tunstall Alarm system in our bungalows.

Grounds Maintenance:

The majority of our grounds maintenance is delivered by our internal Estates Team, who are directly employed and familiar with the specific needs of our schemes. In addition, we work in partnership with the Local Authority and a volunteer group called Learning Curve, which supports adults with learning disabilities and challenges. This group contributes to the upkeep of outdoor spaces at a number of our schemes, providing both a valuable service and meaningful opportunities for community involvement and inclusion.

Resident Involvement:

We hold monthly Tenant Meetings in all our Schemes, and I meet with our Involved Tenant group monthly also. In addition, we have quarterly Regional Meetings, for our Tenant Representatives to come together.

Scheme Activities:

We have a large number and wide range of activities across our Schemes. Our Scheme Coordinators encourage activities and at the early stages, offer help and support, however whenever possible will, step away to allow our tenants to run and organise the events independently.

We very much advocate the ABCD approach (Asset Based Community Development) and believe this is the reason for the continued success of the activities that are held.

We have built a great network of contacts and organizations that know they can use our spaces to reach our tenant group.

Pets Policy:

We welcome requests from tenants who wish to keep a pet. However, approvals are rare due to the nature of our accommodation. The majority of our properties do not have direct

outdoor access, which limits our ability to safely and practically support pet ownership. Each request is considered on a case-by-case basis, taking into account the individual circumstances, the type of pet, and the suitability of the property.

Infestations:

Thankfully we have not had any issues with big infestations, however if we did any cost would be recharged to the tenant. If necessary, we would refer the tenant to receive additional support to action.

Decarbonisation and Net Zero:

Our schemes already benefit from a range of energy-saving features, including solar panels, double glazing, high-grade insulation, and efficient heating systems. We've also installed sensor-operated lighting to reduce unnecessary energy use in communal areas. These measures contribute to lower energy consumption and improved comfort for residents.

Looking ahead, we are committed to supporting the Net Zero agenda and have a number of planned works aimed at further decarbonising our housing stock. These include upgrading heating systems to low-carbon alternatives, improving insulation standards, and exploring the expansion of renewable energy technologies across more schemes. Low maintenance gardens, with wildflower meadows to increase biodiversity and encourage wildlife, also the installation of water butts, to reduce reliance on mains water.

While these improvements are essential for long-term sustainability and compliance with national targets, we are mindful of the potential impact on future rent levels. We aim to balance environmental responsibility with affordability, and any changes to rent or service charges will be carefully considered and communicated transparently with tenants.

Communal Lounges:

We freely allow our tenants to use their communal lounge without restrictions, however for more formal larger events, we ask that they complete a Reservation Application Form. They need to provide the name and contact details of the event organiser, number of attendees, nature of the event, start /end time etc. This request is discussed at the Scheme Tenant Meeting (held monthly) for discussion and approval/rejection. This includes, both tenant and external groups.

The form includes guidance on the room use and expectations regarding cleaning up/noise and number of attendees etc.

Guest Bedrooms:

Currently we charge £5.00 per night, and the income is returned to the business.

White Goods:

We don't provide any white goods

Mobility Vehicles:

Each of our schemes has a designated scooter storage room, where tenants are required to store and charge their mobility scooters safely. However, we recognise that this arrangement may not be suitable for everyone. In such cases, we provide individual guidance to ensure safe storage and charging within the tenant's property, where appropriate

All mobility vehicle owners must provide annual documentation, including proof of servicing or a valid PAT test certificate, along with insurance documentation to ensure safety and accountability.

We have seen a notable increase in the use of mobility scooters, and some schemes have now reached full capacity for storage. To manage this, we operate waiting lists and strongly encourage tenants to seek written permission before purchasing a mobility vehicle. While there have been instances where scooters were purchased without prior approval, we have responded by offering advice and support rather than enforcing bans. To date, we have not prohibited the use of mobility vehicles, but we continue to monitor demand and may need to review our approach in the future to ensure safety and accessibility for all residents.

Appendix 7 – Housing Trust in England

HT is an Exempt Charity, registered as a Co-operative and Community Benefit Society and a Registered Social Landlord in England

Age of residents: Minimum age 65+

The age profile of applicants is changing, with more applicants being older (90 yrs+), despite stating they are not ready to move in yet, or have just turned 65 years, with few in between.

In the last 12 months we have had two tenants who have moved into a care home within two months of moving into sheltered housing, due to mobility problems.

We are seeing that newer tenants are much more spritely and able or conversely, challenged with their mobility.

Service Description: Scheme Based

The Trust's Sheltered Housing aims to provide:

- 24-hour assistance through an emergency call system
- A manager and support staff who are on duty, or on-call on the site, 24 hours a day
- Assistance with day-to-day living in the manner of a "good neighbour"
- To provide an environment that empowers and nurtures those living within the Trust
- Liaison with tenants' families, statutory, voluntary, or other support services to ensure tenants' needs are met
- An environment that is both safe and stimulating in easily managed accommodation that allows older people to maintain their privacy, dignity, and independence
- Its tenants with a service that focuses on empowering older people to have choices and control over the way they choose to live, valuing their contribution to the community

Housing Stock for older people

Property Type	Number of units
Bedsit	22
1 bed	46
Total	68

Managing the quality of the service:

The Trust undertakes an annual survey, the CEO has monthly 'drop-in' sessions that any tenant can attend, there are bi-monthly general tenants' meetings, with the Chair of Vice Chair attending every other meeting, suggestion boxes, general feedback form tenants, such as letters, cards, and emails. All repair requests are logged digitally including completion date, and tenants are asked to complete a repair feedback form. All complaints are logged and annual reports covering, survey, repairs, compliments, and complaints is provided to the Board, and monthly CEO reports and copies of minutes from all meetings.

The Sheltered Housing Manager and Director of Operations have quality assurance remit, in gathering data and providing reports for the CEO/Board.

Allocations:

All potential tenants complete an application form to prove their eligibility against criteria, and indicating the preference of a one bed, or studio flat, or no preference. We have four waiting lists.

- 1: Single occupancy, ready to move
- 2: Double occupancy, ready to move
- 3: Single occupancy, not ready to move
- 4: Double occupancy, not ready to move

Once a flat is vacant, the next eligible applicant(s) on the ready to move list are contacted to determine if they are ready to move and to view the flat. Applicants are given an option to refuse one offer of a flat, before moving back to the bottom of the waiting list.

In recent years, studio flats have become harder to let as most people state a preference for 1 bed flats, although in 2024 there was an increase in applications from people who preferred or were prepared to accept a studio flat.

Assessing New Tenants:

An interview/assessment is conducted, checking details on the application form, detailing medical history/ social history/ local network/next-of-kin/support needs, to determine if this is the correct environment and what additional support may be needed for independent living.

Any unsuitable applications are not accepted with an explanation included in the letter. If any applicant comes to view a flat, and it is not appropriate/safe then this will be explained with other options and information provided.

We are finding that potential applicants are not always completely honest with us when conducting the assessment, with their needs being greater but downplayed/masked by the applicant and their family at assessment. In recent months we have had a tenant move into our residential home within a few weeks of moving into sheltered housing, as they were not able to live independently and safely, even with a care package. We are planning to review our pre-assessment form to have more direct questions, and the welcome packs are being re-written and will provide clearer information on the support staff role and stress (politely) that independence is required to live here successfully.

Rents and Service Charges

	Rent	Service	Support	Water (per person)	Total per week	Total per month
Studio PH	88.39	74.82	22.59	3.47	£189.27	£822.42
1 bed Flat PH	98.16	81.11	22.59	3.47	£205.33	£892.21
1 bed flat	96.65	78.83	22.59	3.47	£201.54	£875.74

The flats listed with a PH have a heat network providing heat and hot water, the other flats have a gas boiler, the Trust pays for providing and maintaining the boiler and the tenant pays for fuel consumed.

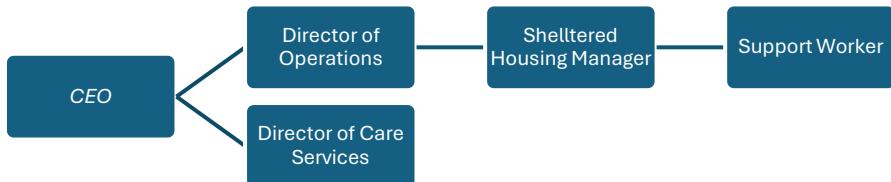
Management Charges:

The Trust has four separate services and management costs are apportioned across these services. For 25-26 budget, 100% of management costs were included in the rent element of the overall rent charges.

Service Charge Caps: n/a

Staffing:

The sheltered housing staff structure is quite simple:



The Sheltered Housing Manager is line managed by the Director of Operations; both are full time employees (37.5hrs per week). There is no set time spent by the DoO supporting the manager, staff, or tenants each week. The CEO and Director of Care will also provide support/help when needed. The main admin head office is based out of one of the sheltered housing buildings, and so all are on site each day.

The sheltered housing support workers have shift times that start at 07:00 and finish at 22:00. From 22:00 – 07:00, the staff sleep-in and if woken, their time is considered waking hours.

If a tenant has requested a daily visit, this will be carried out. The support staff will meet tenants to update support plans, tenants often drop- in to the staff office to update with information or just to chat.

Staff Recruitment and Retention:

There have been challenges with recruitment in recent years, especially with applicants not wanting to work the shift hours on offer. The Trust has matched the Real Living Wage for its lowest paid employees and has a good retention and reward scheme. The team members who have left in recent years have retired or moved away from the area. Three of the seven members of the Sheltered Housing team have worked for the Trust for more than 15 years.

Supporting People funding: n/a

Challenging Behaviour/ASB:

There has been minimal increase, and it is not clear whether this is down to age/infirmity or personality.

One tenant continued to throw food out of the window for birds and pour water down the outside of the window to try and clean it – causing distress to the tenant below. Another was openly hostile verbally to another tenant.

Cleaning:

The housekeeping staff are directly employed and work an average of 5 hours Monday – Friday.

Heating:

One building has a heat network, providing hot water and heating for 48 flats, therefore, we will be affected by the regulations. The other 20 flats have gas boilers which are maintained by the Trust, but gas bills are paid by the tenant.

Community alarm monitoring: n/a

Alarm Equipment/Digital Switchover:

All Trust phones are VOIP, tenants have been made aware of the forthcoming changes and offered support with their providers if needed. Fire alarm is already linked with external monitors via SIM.

Alarm equipment is Courtney Thorne – this was installed at the beginning of January 2025.

Grounds Maintenance:

The Trust employs one full time gardener to manager both sites.

Resident Involvement:

We are not signed up for the Together with Tenants charter, but endeavour to follow the ethos.

Our most recent survey had 100% of respondents stating that they felt the Trust treats them fairly and with respect.

We provide clear information to tenants, in writing and for those with sight problems, staff will inform them verbally of anything of note or interest to them.

We hold a general tenants meeting, where all tenants are welcome to attend, every other month. A member of the Senior Leadership Team always attends to provide updates on matters relating specifically to sheltered housing and the Trust in general.

The Trust continually seeks tenant feedback, via surveys, drop-in sessions, suggestion boxes, email, in person or via the phone. This is raised at every tenant meeting as a reminder.

The Trust has asked tenants to be part of a focus group for projects, e.g. the current website upgrade project. When flat front doors were upgraded to meet fire regulation standards, tenants were able to choose their preferred colour from a provided list. Residents reported in the survey that they are happy to speak with the sheltered housing team, and the Senior Leadership team about any issue that matters to them and without fear. All minutes and reports regarding sheltered housing are shared with the tenants and the financial accounts are published on the FCS website. Many tenants are shareholders and receive copies of the Trust Annual Report.

Tenants are asked to complete feedback forms following any repair in their home and are comfortable raising repair request with staff who log the jobs electronically for the maintenance team.

The Trust complaints procedure was updated in accordance with the Housing Ombudsman requirements and is displayed on each notice board. This was discussed at the general tenants meeting and tenants were informed that they could request a copy at anytime, should they want one.

Scheme Activities:

Most activities are led by tenants or have been suggested by tenants. Staff run several activities alongside tenants, such as Bingo, and evening quizzes. There is an external exercise coach who comes one times per week, and tenants also organise many activities, i.e. twice per week exercise session, knit & natter, crafting, Rummikub, dominoes, cribbage, art, to name a few. Staff organise a weekly coffee morning, monthly singing group and other infrequent activities throughout the year, such as historian talks, fish and chip suppers, group dining, afternoon teas and events over Christmas.

Pets Policy:

Our current tenancy agreement states that any animals kept at the premises must be kept under control and not to keep any animal that may cause damage to the property or cause a nuisance. Cats and dogs are not permitted, except for blind dogs. No tenant or potential tenant has objected or questioned this yet.

Infestations:

We have not had any true infestations in recent history. There has been one incident of bedbugs in a flat, and one incident of moths in a flat. It was determined that the tenant had brought the moths with them when they moved in and costs for pest control were passed on to the tenant. The tenant who had bed bugs in their flat followed a trip abroad and the Trust and tenant agreed that these were brought back with the tenant, and the costs for pest control visit would be paid for by the tenant. A subsequent visit was required, and as the Trust had arranged the first visit, they paid for the second visit.

Decarbonisation and Net Zero:

We are planning to replace some windows in one of our buildings. It is likely that this will lead to an increase of future rents, as part of a new planned capital expenditure budget line.

Communal Lounges:

We have, at times, had tenants complain if the lounge has been used for staff training, some tenants feel that the lounge should be theirs to use at all times, and new tenants have assumed they can use the lounge and invite friends/family for coffee.

External groups have used the lounge in the past, usually when a tenant is part of their group. We have never placed a charged for use of the lounge by external groups. There is no specific guidance about use of the lounge, but its use is explained to prospective tenants when they come to look around, and this is also included in the application and welcome packs, and tenancy agreement.

Guest Bedrooms:

The Trust charges £35 per night for the guest room. This is attributed to the SH service budget, to cover staff, laundry, and provision costs.

White Goods:

The newer annexe and refurbished kitchens now include an integrated oven and induction/electric hob. Older building flats have space for a free standing electric cooker, but as the kitchens are replaced, new integrated appliances will be installed.

Items will be replaced if faulty, broken or as part of a full kitchen upgrade.

Mobility Vehicles:

Several tenants have electric scooters and park and charge these in the allocated area of our adjacent residential home, which has specific outside plug areas for charging. Smaller electric scooters which can be accommodated in certain flats can be charged inside the flat, but under instruction following individual risk assessment.

Only the most recently constructed part of one building is suitable for access of electric scooters into a flat. We currently have six charging points and so far, this is adequate.

Appendix 8 – HA in England

Housing Association in Southern England

Age of residents: Minimum age 60+

The average age of our residents is 77; unchanged since 2022.

Service Description: Scheme Based

The Association is a registered charitable housing association that supports former members of HM Armed Forces and their families over the age of 60. It currently provides 5 sheltered housing schemes in the local area. In keeping with its Christian values, it provides a choice of high-quality sheltered housing irrespective of religious faith/belief and without any form of religious promotion. It believes in promoting tenant wellbeing, enabling independent living for those who are able, and encouraging mutual support. Its Mission is to carry on for the benefit of the community, the business of providing housing, that, with the low-level support of a Scheme Manager, enables independent living for eligible applicants in necessitous circumstances upon terms appropriate to their means; and to provide any associated amenities specially designed or adapted to meet the disabilities and requirements of such persons.

Housing Stock for older people

Property Type	Number of units
Bedsit	3
1 bed	177
2 bed	4
1 bed disabled	5
2 bed disabled	2
Total	191

Managing the quality of the service:

Incorporated within other roles (e.g. Asset & Services Manager, Tenant & Services Manager and Director of Housing).

Through benchmarking with the Acuity Housing for Older People Benchmarking Group; physical stock condition and H&S regimes, annual scheme audits, as well as via tenant feedback at 8-weekly tenant meetings, repairs surveys carried out at the point of delivery, and biennial tenant satisfaction measures surveys.

Erosch Independent Living Standards.

Allocations:

Direct lettings from advertising, referrals from outside agencies (including local authority) and personal recommendations from existing tenants.

Assessing New Tenants:

Formal interview at the scheme conducted by the Tenant & Services Manager and the Scheme Manager; Risk Assessment and written assessment of application and suitability for occupancy. Paperwork reviewed and signed off by Director of Housing. Considering reviewing referencing to make it more robust as have had issues of housing someone who was unsuitable for the accommodation.

Rents and Service Charges

Rather than being solely dependent on the number of bedrooms (though it is an element of determining the rent for each property), rents and service charge are also dependent on the occupancy size (1-bed flats are either suitable for 1-person or 2-person occupancy). Also, depending on when someone has moved in, different tenants will be paying different rates for a similar sized property. Note that single occupants living in a 2-person occupancy pay the 2-person occupancy rates, with a single person living in a 2-bed property that is 3-person occupancy do not benefit from reduced rates either. Indicative averages of new let rates are as follows:

- Studio – Basic Rent - £373.82, Service Charge - £189.99, Total - £595.69
- 1-bed single occupancy (including disabled flats) – Basic Rent - £444.52, Service Charge £172.95; Total - £617.47.
- 1-bed – up-to-double-occupancy (including disabled flats) – Basic Rent - £461.63, Service Charge - £259.29. Total - £720.92
- 2-bed, up to 3-person occupancy (including disabled flats) – Basic Rent - £529.42, Service Charge - £256.89. Total - £786.31.

Management Charges:

HA levies a Management Fee of 15%, but most is donated back to tenants to cover HB ineligible support costs.

Service Charge Caps: n/a

Staffing:

Scheme Managers x 7 (one covers 2 schemes on a part-time basis at each)
- Scheme Maintainers x 2.
- Scheme Cleaners x 8, working an average of 2 hours p.d. Mon-Fri.
- Head Office – Housing office staff x 5 (Housing Administrator, Accounts Clerk, Tenant & Services Manager, Asset & Services Manager & Director of Housing); plus CEO working 17.5 hours a week. 22.5 staff in total.

Low level support only provided – e.g. daily calls (where requested and/or identified as being needed), but wellbeing record of sighting/contact kept; support planning where either requested, or offered and accepted; signposting to external services (including those for advice)

The Association offers an Additional Support service, provided by Home Instead and funded by the Organisation for a period of up to 12 weeks. Total funding provided is capped at £15k p.a. This provides low level support e.g. wellbeing visits, trips out or carer respite visits to enable a tenant caring for a partner to have time to themselves. Move on arrangements support users to either continue with the service on a self-funded basis or to identify alternative funding sources/services.

Staff Recruitment and Retention:

The Association has a very stable complement of staff, many of whom have been with the service for a considerable number of years (e.g. 30+ years).

Supporting People funding: n/a

Challenging Behaviour/ASB:

Yes, less tolerance between residents and several instances of aggression shown towards staff. All find these instances upsetting but we have observed that those most affected may also be the ones unintentionally initiating the ASB themselves. In one instance this has resulted in our, very reluctantly, having to install barrier arrangements across a scheme office door to prevent tenants from just walking in.

Cleaning:

All directly employed. The number of hours on site depends on the volume of cleaning agreed as being required with tenants; however, on average this is 2 hours a day.

Heating:

HA schemes have hot water and heating systems operated via a communal boiler, so will be affected by the Heat Network Regulations. Its early days, but the Association is considering moving from central gas boilers to electrical heating systems. Note all the managed schemes already have full electrical heating and hot water.

Community alarm monitoring: PPP Taking Care Limited

Alarm Equipment/Digital Switchover:

All schemes have been converted to digital door entry and emergency alarm systems. All, bar 1 have had fibre broadband fitted. HA is working with Careline to finalise the transition to a fully digital service.

Tynetec digital hardwired system

Grounds Maintenance:

Contractors, with tenants involved in the tender process.

Resident Involvement:

HA is signed up to the NHF's Together with Tenants standard, and the standards form the Association's service standards to tenants. The Tenant and Services Manager meets with tenants (all are invited) every 8 weeks for a cup of tea and a catch up, when residents can raise concerns. Scheme-based service concerns (e.g. the use of the tannoy system, or provision of additional laundry facilities) are balloted; giving every tenant an opportunity to give their opinion on scheme-based services. 3 tenants also sit on the Association's Housing Committee to ensure that their voice is heard at Board level and they are able to influence operation and strategic decisions at a senior level.

Scheme Activities:

Varied across schemes depending on tenants' wishes and abilities. A HA has just initiated a scheme to encourage the setting up of formal Tenant Social Committees, whereby in the first year of operation committees will receive a £300 donation to committee funds, augmented annually by a further £100 grant.

Pets Policy:

Only small pets and no dogs or cats, unless registered service animals. Policy determined by consultation with residents (ballots), when 70% of tenants said they did not wish pets (dogs and cats) to be living in their scheme. The policy is due for review in December and will include a further resident ballot to update their views, which will have a direct impact on the policy going forward (especially considering that the Renter's Rights Bill states that 'Pets must be permitted' unless a particular reason dictates otherwise).

Infestations:

Yes, has previously been experienced at several schemes, resulting in all having a comprehensive pest control contract in place, that provides regular inspections and visits. The Association initially pays for treatment/s, but the cost is service chargeable so costs are offset by S.C. income.

Decarbonisation and Net Zero:

Replacement double glazing; remedial works to make scheme heating systems more energy efficient; installation of heat monitoring equipment in communal areas and in flats experiencing extreme temperature fluctuations. Installation of PV in a phased programme (not yet started). No impact on the charging of future Basic Rents that are governed by the Governments Formula Rent regime but may positively impact service chargeable energy costs.

Communal Lounges:

No particular challenges being experienced. External groups are allowed to use communal lounges, so long as residents are included and able to attend. They are not currently let out on a commercial basis. Communal lounges are also used, at no charge, by Head Office for corporate events and meetings.

Guest Bedrooms:

Charges are: £15 per person, per night. The income is recorded as income against the guest room service and is used to offset room and fixtures and upgrades to keep the facility in a good and attractive condition so as to attract guests.

White Goods:

Only to disabled flats which are repaired and/or replaced when needed. Where white goods are in good condition and taken on by incoming tenants, they sign a disclaimer to accept responsibility for their maintenance and replacement when needed.

Mobility Vehicles:

Each scheme has storage facilities for scooters and demand is steady, with residents often waiting until a space becomes available. One scheme has storage facilities in the flats remodelled in 2018. Tenants must either store electric scooters, wheelchairs or bikes in their home, or use designated facilities. Communal storage in communal corridors is prohibited for H&S reasons. The scooter policy was recently updated to include electric e-bikes and other e-vehicles. Tenants using storage facilities are charged £50 p.a. (chargeable proportionally for new tenants moving in during the year).

Appendix 9 – HA -England

Housing Association in England

Age of residents: Minimum age 55+

The client group are definitely getting younger, and in some cases more challenging.

Service Description: Scheme Based

The Overall aims and objectives: to ensure that our customers have a choice of high-quality housing with care and support that enables them to lead active, safe, healthy and independent lives.

Housing Stock for older people (includes 181 units of Housing with Care stock)

Property Type	Number of units
Bedsit	17
1 bed	612
2 bed	54
1 bed bungalow	23
2 bed bungalow	2
Total	708

Managing the quality of the service:

The managers have the role of managing quality and use the following:

1. Case audits of tenancy management checks, safeguarding and ASB cases by managers
2. Weekly Building inspections
3. New tenant visits/tenancy management checks with customers
4. Satisfaction surveys post-visit/contact with Citizen (a range of service touchpoints, not just the retirement living service)
5. Annual tenant satisfaction measure surveys
6. Quarterly scheme meetings
7. Complaints
8. Ad-hoc feedback

Registered for Erosh Independent Living Standards with assessment early 2026.

Allocations:

Retirement Living allocations:

- CBL primarily, with Zoopla ads when CBL doesn't come up with any applicants. Direct lettings to those who meet discretionary move criteria (medical/support needs).
- We find that CBL is not particularly accessible for older people; it also doesn't help us to create balanced communities in our schemes as we invariably have the person most in need from the top of the CBL list – more often than not, a single, homeless male, increasingly with a number of substance/behavioural needs. This can affect gender

balanced communities and a concentration of challenging support needs that ideally, we would spread across different schemes.

- We have used a downsizing initiative for a brand-new scheme – great success and led to LA part-funding of a permanent role.
- Zoopla is hit and miss
- Referrals from professionals and internal colleagues can work better – discretionary moves

Assessing New Tenants:

- Pre-tenancy checks to test for the usual background checks, affordability checks plus Retirement Living Officers do an additional screening questionnaire (interview with potential customer) to check level of support needs, and suitability for scheme/scheme suitability for them.
- Dealing with previous criminal offences can be problematic if these are spent but reputations and types of past offending history can feel risky but duty to house is our primary responsibility. Additional checks will be done to ensure that we have fully understood the nature of offences/convictions and any risks/licencing conditions are fully disclosed and discussed which they are not always on application.
- All new tenants will be visited and inducted into the scheme and a thorough risk and needs assessment completed with them so we have a clear understanding of support needs and challenges that we can potentially help with.

Upgrading/Reviewing Schemes

- We are on a major programme of modernisation of existing schemes.
- We are seeking to build new schemes.
- We have identified one scheme that is potentially does not have a long-term future as a retirement living scheme.
- All schemes have been assessed for their financial viability,

Rents and Service Charges

Retirement Living (sheltered housing)			
	Coventry – ave rent and service charge	Birmingham	Hereford/Worcester
Studio flat/bedsit	Rent – 87.90 s.c – 62.03	-	-
1 bed flat	Rent – 127.23 s.c 64.47	Rent – 103.30 S.c – 39.17	Rent – 99.05 ss.c. – 43.35
2 bed flat	Rent – 117.38 s.c. - 49.94	Rent – 127.12 s.c- 26.20	-
1 bed bungalow	-	Rent – 115.13 s.c. – 29.53	Rent – 113.02 s.c. 20.50
2 bed bungalow	-	-	Rent – 129.88 s.c. – 13.70

Management Charges:

Yes, in most of them – usually a 15% fee.

Service Charge Caps: n/a

Staffing:

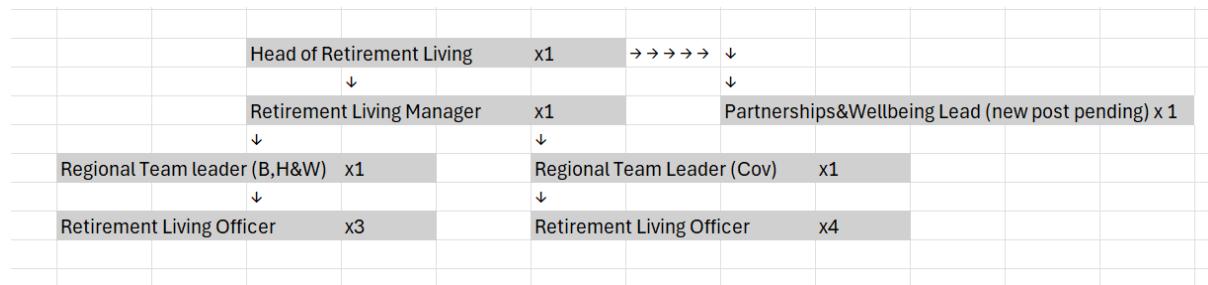
Retirement Living Officers are principally on site managing 2-3 schemes each.

Team leader will manage 1 scheme and rest of their staff.

Hours on site – typically 8.30 – 4.30 pm each day with a 1 day or half day at home (FTE is 37h per week)

RLOs responsible for: Daily welfare status calls, building and property health and safety checks, housing management and tenant consultation duties, tenancy management checks and new tenant visit inductions (both incorporates risks and needs assessment), support plans for those that need it, PEEPs for all customers.

A new role of partnerships and wellbeing lead is being explored (subject to funding and approval), to bring in additional partnership and wellbeing services and activities in to schemes, linking into the community where appropriate.



Staff Recruitment and Retention:

The team has been stable for a long time but now have half the team retiring or approaching retirement – recruitment to part time roles may prove more difficult than for full time positions (some roles are currently less than 37 hours).

Supporting People funding:

No SP funding.

We variably call the scheme officer charge an Intensive Housing Management charge – LA's are increasing their scrutiny of the IHM charge to check eligibility of tasks expected to be paid as part of HB or UC.

Challenging Behaviour/ASB:

Yes – more mental health, more substance abuse, more alcoholism, more chaotic backgrounds – verbal aggression and bullying of staff and other residents, examples of physical threats to life, more safeguarding but a reluctance and delay from social services to get involved (thresholds very very high). Difficult to get proper assessments or move people on – we are using more injunctions to manage behaviours at considerable cost to organisation.

Cleaning:

Estates and Cleaning team clean the schemes. Cleaning hours – varies but average 2 hours per day on site; Housing with Care gets 5 days a week on site; most sheltered housing – between 3 and 5 days on site.

Heating:

Mix of communal heating system supplying heating in homes with costs apportioned to each customer, to individual storage heater systems. No plans to change in any schemes – not affected by heat network regulations as far as I know.

Community alarm monitoring: Appello.

Alarm Equipment/Digital Switchover:

All schemes with hard wired systems are already upgraded to digital systems.
Appello system

Grounds Maintenance:

Directly employed by organisation.

Resident Involvement:

Quarterly scheme meetings; text surveys after use of certain services; TSM surveys.

Scheme Activities:

Quarterly scheme meetings – with Retirement Living Officer to get feedback on scheme and services and share info on services or issues affecting scheme. Ad hoc programme of activities – some with RLOs facilitating/organising and lots done by residents themselves. Often social – coffee mornings, lunch clubs, book clubs, jigsaw clubs, gardening clubs or themed around sporting events – e.g. Wimbledon cream tea. RLO's organise visits/talks from police, fire services and other agencies where appropriate.

Pets Policy:

Pets allowed with permission. Must be manageable in home. No pets that need walking above the first floor. Type and potential noise/smell etc taken into account before permission given.

Infestations:

None so far re bed bugs. From time to time, mouse/rat infestations – in house estates team manage and deal with these unless evidence that a resident has caused it.

Decarbonisation and Net Zero:

Modernising homes and facelift of existing schemes from 80s and 90s. Don't anticipate additional impact on future rents, but some service charges could be reviewed and changed if we introduce new facilities (e.g. scooter stores) in schemes.

Communal Lounges:

Generally, no challenges other than probably an under used facility. Some thefts of TVs and kitchen equipment over the years in some schemes – we have had to find ways to secure these. External groups generally don't use them unless residents want to invite them in to do something. No written guidance at the moment but risk assessments needed for any activities over and above the norm.

Guest Bedrooms:

In the process of closing these down. At the moment – about £15 per night.

White Goods:

Some schemes have legacy TA clauses where we provide white goods (cooker and fridge) – slowly being phased out. Where we have a responsibility, we replace or repair where appropriate.

Mobility Vehicles:

More robust policy on these – scooter stores in place in some newer schemes, and new external scooter store facilities have been created at other schemes – expect to continue to develop these across all schemes. Insurance required to store in dedicated facilities. Not allowed in flats where facilities are provided. Main challenge is around security and fire risks, especially if souped up e-bikes start making an appearance. Charging has not been an issue – we have been through consultation with customers on these.

Appendix 10 – HA England

Housing Association in England

Age of residents: Minimum age 60+

We have introduced a local lettings policy to some schemes where we have difficulty letting upper floor flats and in these locations the age has been reduced to 50+.

Service Description: Scheme Based

The aim of the Independent Living Service is to provide accommodation and services to our older tenants which enables them to live as independently in their homes for as long as possible. We achieve this through the provision of Independent Living Officer (ILO) support to help each individual manage their tenancy and wellbeing through regular visits, signposting and we also offer a vibrant activities programme, which aims to reduce social isolation and loneliness.

Housing Stock for older people

Property Type	Number of units
Bedsit	0
1 bed	322
2 bed	76
3 bed	1
1 bed bungalow	122
2 bed bungalow	0
Total	521

Managing the quality of the service:

We have our own Performance Team within the Independent Living Service who collate the monthly Health and Safety Reports and monitor compliance for the Independent Living and extra care schemes. This includes the H&S/fire checks completed by the Independent Living Officers in the community and our on-site caretakers at the extra care sites. The organisation recently implemented C365 for H&S across all services, which means all of our H&S/Compliance will be automated and monitored through this platform in future.

We also have operational KPIs for the completion of morning ring round checks, menu of service met, lifeline and pull cord checks and monthly visits for the schemes in the community and our extra care schemes too.

As part of this service, we undertake quality assurance checking person centred plans and customer interactions on a regular basis. This ensures our colleagues are delivering a consistent person-centred service and enables us to identify whether there are any training or support needs, or any underperformance.

We are currently developing a more robust quality assurance process which will involve an officer from our Performance Team undertaking site visits to our schemes too.

Allocations:

Choice based lettings through Select Move. As highlighted above, we do have difficulties letting upper floor flats in our scheme sites and we have had to reduce the age limit in some areas. We have also completed an exercise targeting people bidding for properties in these areas who meet the age criteria to see if they are interested in Independent Living and this has been successful, helping us to reduce our voids.

Assessing New Tenants:

The ILO completes a needs assessment with the person prior to sign up to ascertain if they are eligible for the IL service and have a need(s) which we can meet. If their needs exceed what we can provide or they don't have an eligible need for assistance, we will advise the applicant and signpost them accordingly. We try and meet the applicant upfront to complete the assessment but sometimes this is not possible, and we complete this over the telephone. To date, this approach has worked successfully.

Rents and Service Charges

1B Flat (Pavilion Scheme) – Rent = £95.43 + £65.84 Service Charge (see below) = £161.27 pw.

Estate Charge	28.46
Heating Charge	15.26
Intensive Housing Management	22.12
Provision for Renewal	0.00
Total	65.84

1B Bungalow (IL) – Rent = £99.24 + £33.55 Service Charge (see below) = £132.79 pw.

Estate Charge	11.43
Heating Charge	0.00
Intensive Housing Management	22.12
Ineligible IHM	0.00
Provision for Renewal	0.00
Activities	0.00
Total	33.55

1B Flat (IL) – Rent = £96.76 + £45.03 Service Charge = £141.79 pw.

Estate Charge	21.02
Intensive Housing Management	24.01
Total	45.03

2B Flat (IL) – Rent = £94.55 + £38.24 Service Charge = £132.79 pw.

Estate Charge	16.12
Intensive Housing Management	22.12
Total	38.24

3B Flat (IL) – Rent = £105.21 + £34.28 Service Charge = £139.49 pw.

Estate Charge	12.16
Intensive Housing Management	22.12
Total	34.28

Management Charges:

We currently charge 10% management fee but are looking to increase this in 2026.

Service Charge Caps:

We only ever increase our service charges by CPI + 1%. We have adjusted some charges in the past e.g. heating for a scheme to reflect the actual cost.

Staffing:

IL Manager – responsible for overall IL service.

Extra Care manager – responsible for 2 x extra care sites. Staffing includes: 2 x ILOs, 1 x caretaker on each site full time (total of 6 staff).

IL Community Team Leader responsible for managing schemes based in community.

Staffing includes: 12 x ILOs across 11 schemes and 1 road of bungalows.

ILO tasks - the ILOs for extra care and community are responsible for completing daily calls, home visits (in line with Menu of Service), monthly property checks, lifeline & pendant equipment testing, helping tenant to understand tenancy and reporting repairs/organising access, health and safety checks in communal areas and PCFRA for tenants where required, signposting to other services e.g. adult social care/OT/mental health, drug & alcohol, managing low level ASB, reporting and recording safeguarding concerns, encouraging tenants to attend activities.

IL Performance Team Leader responsible for Performance team. Staffing includes: 1 x IL Facilitator (fits lifeline units, responds to repairs/issues, managing digital transition), 1 x Co-ordinator responsible for checking ILO reports, collating data for performance report.

Within HA, we have a Tenancy Support team whose primary goal is to help tenants navigate various aspects of financial support. They help with a wide range of welfare benefits, as well as help with obtaining grants, food parcels, and energy vouchers. Their service is designed to alleviate financial stress and improve the overall well-being of our tenants.

Types of Welfare Benefits We Help With:

- **Universal Credit:** A payment to help with living costs for those on a low income or out of work.
- **Pension Credit:** An income-related benefit aimed at people over State Pension age.

- **Housing Benefit/Council Tax Support:** Assistance with housing costs and council tax for those on a low income.
- **Personal Independence Payments (PIP):** Support for those with long-term health conditions or disabilities.
- **Attendance Allowance:** A benefit for people over State Pension age who need help with personal care due to illness or disability.
- **Employment and Support Allowance (ESA):** Financial support for those unable to work due to illness or disability.
- **Jobseeker's Allowance (JSA):** A benefit for those actively seeking work.
- **Income Support:** Financial help for those with no income or a low income.
- **Carer's Allowance:** A benefit for those who care for someone with substantial caring needs.
- **Child Benefit:** A payment to help with the cost of raising children.
- **Tax Credits:** Financial support for those responsible for children or working on a low income (ending in April 2025).

Staff Recruitment and Retention:

In 2024, we had a lack of interest in the ILO roles, and it was difficult to recruit people with the right skills/knowledge/experience. We broadened our advertising to include social media last year and this has attributed to an increase in interest. However, in 2025 we received more applications from people who come from the NHS, school roles or private sector, which may be due to other external factors.

In terms of retention, we don't have a high turnaround in the team and people move on for valid reasons. However, we introduced a full induction programme for each role within service about eighteen months ago, which includes one-to-one shadowing for new colleagues, and we ask for feedback throughout the first three months of the induction. Responses have been positive, with new colleagues telling us that they feel welcome and fully supported to learn 'on the job' until they have the confidence to undertake their role independently.

This approach also helps us to identify early on whether someone is not suited to the role.

Supporting People funding:

No SP funding.

We receive a weekly IHM amount for all of our schemes (community site based and extra care). This covers some aspects of the ILO role.

Challenging Behaviour/ASB:

The ILOs manage low level ASB and try and resolve issues before they escalate. However, we have seen an increase in ASB in one of our extra care schemes and this has been managed in-house between colleagues on site and our tenancy management team, and we also involved our in-house mediator to resolve one case.

Tenants living in the scheme do find ASB unsettling and that is why the staff on-site respond to any concerns promptly to ensure people feel safe in their home.

Cleaning:

We outsource this to an external organisation, and, on average, they carry out the following:

- Extra Care - 5 hours per day per site (2 sites)
- IL Community – 1 hour per day per site (x 10 sites)
- Pavilion Scheme – 2 hours per day (x 1 site)

Heating:

We have gas central heating in our older scheme-based sites, the surrounding properties and one of our extra care schemes. The other extra care scheme has electrical heating, and the communal areas are powered by solar panels.

The pavilion scheme in the community has a gas central heating system which services all tenants living in the scheme and we will be reviewing this in the near future.

Community alarm monitoring: Progress Housing Group

Alarm Equipment/Digital Switchover:

We have transferred 85% of our lifeline users over to digital and we anticipate that all of our users will have a digital unit by the end of 2025.

We have procured Tunstall to fit the IP connectors in our older scheme-based sites with hard wired equipment this year also.

We have a mix of equipment purchased from Tunstall and Chiptech. We have arranged to have IP connectors fitted to our older scheme-based sites and have been informed that these will last between 5-7 years. The equipment is over 15 years old so we may look to replace this with free standing lifeline units in future but have no immediate plans to change this. We have the Tunstall VI systems in the extra care schemes, which are more modern and digital ready.

Grounds Maintenance:

Directly employed by organisation, part of the Greencare Team.

Resident Involvement:

We are signed up to the Together with Tenants charter. In terms of involvement from Independent Living tenants – all tenants are actively encouraged to take part in our involvement opportunities, and we promote them through a range of different communication methods (both print and digital).

We have several schemes represented at our formal involvement opportunities and online engagement platform and we carry out full consultation with tenants on any changes to customer facing services, providing them with a voice.

Scheme Activities:

We have a vibrant activity programme which runs across the service and although the extra care schemes have their own activities on site, we do offer day trips and evening events for all tenants on IL service e.g. Summer Ball and Christmas Party and these have been very successful.

The activities are supported by the ILOs who will also encourage and empower our tenants to set up their own too and some of the schemes have active community led groups.

We outsource some activities to local organisations e.g. music workshops and armchair exercises and these are funded by HA.

Pets Policy:

We have a 'no pets' policy in our extra care schemes, with only service dogs allowed. This is because it's difficult to manage pets within this environment and any issues with pets causing nuisance behaviour can directly affect others. We recognise that this can be difficult for some tenants who would benefit from having a pet for their wellbeing and do have plans to bring in pets for therapy sessions.

Within the scheme-based sites, we only allow pets where tenants have their own front door e.g. bungalow accommodation and some ground floor flats with a garden.

We have a pet plan for any IL tenants which assures us that they are responsible pet owners and have plans in place in case they are ill or can't look after their pet any longer.

Infestations:

We have had a few on one site and these have been referred to external organisations to deal with. HA's policy is to treat infestations of rats, mice and squirrels inside the home only and ensure work is undertaken to prevent future access. HA will treat wasps and bees where they are located in an external doorway or preventing access to a tenant's home. The removal or treatment of any other pests is the tenants' responsibility. This includes ants, slugs, woodlice, bedbugs, flies and wasps and bees that are not preventing access to the home.

HA will pay for any infestations relating to the fabric of the building.

Decarbonisation and Net Zero: n/a

Communal Lounges:

The main issue is the communal lounges are underutilised in over 50% of our schemes and we are focusing on providing more activities in these locations to encourage tenants and local residents to attend.

We have built good relationships with local organisations and some of our lounges are used by local drug and alcohol services and the Police to carry out surgeries, offering support to our tenants in the scheme and the wider community.

The extra care communal facilities are well used and serve as a community hub also for local services. Both of our schemes have a vibrant activity programme and this year we have had music workshops, chair-based exercises, digital skills training and tenant run activities too.

We have a notice on the boards in the communal areas about the use of the communal lounges and this is explained to new tenants when they sign up for services.

Guest Bedrooms:

We don't have any guest bedrooms.

White Goods:

None

Mobility Vehicles:

Our extra care schemes are more spacious and communal areas and apartments can accommodate mobility scooters/wheelchairs. We require tenants who own a mobility scooter to show that they have their vehicles insured and maintained regularly and this applies to our tenants living in the pavilion scheme in the community too.

Our pavilion scheme in the community is older and flats and communal corridors are narrower and don't allow much space for tenants to manoeuvre their vehicles. We provide a small room which can store 3 x mobility scooters, but tenants are required to charge the batteries in their own home.

We often have to remind tenants to move their scooters or walking aids from the communal corridors for fire safety reasons and this can be challenging because there isn't much room in their homes to store these items, and some people may struggle to get their scooter or walking aid through the door.

Appendix 11 – LA in England

Local Authority in England

Age of residents: Minimum age 60+

The age profile 60 – 100+ some issues with different generations living together many are still working and don't feel ready for Retirement Housing but had little opportunities on the council housing register for alternative housing due to demand.

Service Description: Site Based

It's an independent living service for people over 60+ who can manage a tenancy and maintain their property, there is no support provided. Retirement Housing officers are site based and manage 2-3 sites grouped geographically with a total stock patch of 70 units. They provide all the usual Housing officer functions with exception of rent management functions/court attendance for arrears. Intensive housing management service with daily wellbeing checks Mon-Fri, and weekly, monthly, quarterly on-site building compliance checks and minimum annual tenancy audit for each household – along with all signposting, referral and multi-agency working.

Housing Stock for older people

Property Type	Number of units
Bedsit	154
1 bed	296
2 bed	61
1 bed bungalow	102
2 bed bungalow	80
3 bed bungalow	2
Total	695

Managing the quality of the service:

Housing Operations Manager reviews monthly key performance indicators. Monthly spot checks by Team Leaders as part of 121 staff management and quarterly service audits. Resident reps also do quarterly walkabouts to monitor repairs, cleaning and landscaping standards.

Retirement Housing Co-ordinator x 1.65 FTE performance monitoring and service audit.

Inspected by Regulator for Social Housing in July 2025.

Allocations:

Banding based housing register. Working to address issues around falling demand and unsuitable nominations by working with CAB, GPs and social prescribers to promote Retirement Housing, undertake marketing campaign, furnishing studios, priming the waiting list to ensure all applicants are appropriate for independent living properties.

Assessing New Tenants:

We assess tenants at entry to the housing register, annually whilst on the register, before an offer is made and at the viewing. 6 weeks post sign up an introductory tenant visit is undertaken and twice more in the first 12 months of the tenancy before it becomes a secure tenancy.

Management Charges:

We currently charge 3-4% of total rent.

Service Charge Caps:

Guest rooms - temporarily as we have refurbed them and the increased revenue fully covers the running costs/depreciation and therefore no need to charge an element for this service at present.

Staffing:

Overall 19 staff 16.5 FTE within Homes First (housing department shared across two LA's) Neighbourhood Housing Team - 12 x Retirement Housing Officers FTE (on site housing officer function direct management of tenancies and buildings), Retirement Housing Co-ordinators x 1.65 FTE (remote and on site quality assurance role, procedural, training, induction, budget control, contractor liaison, tenant involvement, senior case work on ASB/hoarding/complex safeguarding), Retirement Housing Team Leaders x 1.9 FTE (complaints, staff/performance management, recruitment, tenant involvement) Housing Operational Manager x 0.86 FTE (performance management, complaints, recruitment, service improvement, contract procurement/management, strategic tenant involvement, budget management, digital inclusion, financial inclusion, external partnership building)

We have lost our local floating support service, there is no support unless homeless about to be evicted, ASC/MH services are so stretched the threshold for support even on safeguarding issues is limited. We are working with social prescribers and some outreach MH services to plug the gaps. We do have a specialist tenancy resolution team for high level ASB/DA and complex tenancy breaches and we also have tenancy sustainment officer that deal with high level hoarding in our Retirement properties.

Staff Recruitment and Retention:

It's been a struggle for the last 4 years to recruit we have not been fully staffed across this period, vacancies go out numerous times, never interview more than 3-4 people per vacancy due to lack of quality applicants. Applicants rarely have direct experience or any housing skills and poor-quality applications. Trying to attend recruitment events, engage schools and colleges (little success with this so far). Have increased our salaries to ensure in line with other local housing providers. allowing staff to work from home on occasion and more flexibly if necessary.

Supporting People funding:

No SP funding.

Intensive Housing Management via our service charge and in consultation with tenants when SP funding was lost many years ago.

Challenging Behaviour/ASB:

We have low levels of ASB in our Retirement Housing generally less than 10 cases per year. We have seen an increase in challenging behaviour around substance misuse/self-neglect/mental health issues.

Cleaning:

Cleaning and window cleaning is contracted out and attendance on site varies based on the scheme size but usually once a week for a few hours, large sites 3 times a week (2-3 hours per visit) Retirement Housing officers sometimes have to changeover guest rooms if cleaning contractor is not due that day.

Heating:

Mixed mainly gas central heating from a communal boiler/plant room in our blocks. There are a few sites that are all electric with storage heaters.

Community alarm monitoring: Careium

Alarm Equipment/Digital Switchover:

Complete – we have an analogue system from Tynetech two models XT and XT2. We have a UDC converter which allows the system to run digitally via a SIM, this is a mid-term solution.

We are currently reviewing our lifeline equipment and are considering options around a full hard-wired digital system or a move to dispersed digital alarms.

Grounds Maintenance:

This is contracted out currently going through procurement for 2026/27.

Resident Involvement:

We have formal engagement structures, we have an overarching tenants panel that inputs at a strategic level, reviews budgets, policies and performance, we have a scrutiny panel that reviews service areas and proposes service improvements, we have a Retirement Housing forum where each site can vote a representative resident on to the forum to take forward issues that affect all RH tenants such as pet ownership, adaptations, ASB, grounds maintenance etc to improve understanding about our services and get feedback about those services and test quality. We have a communication working group, who edit our quarterly newsletter, audit noticeboards and review accessibility of all our literature. Every 6 month at every site we hold a meeting dedicated to that specific site where all staff teams attend and contractors, conduct a walkabout and answer questions from tenants about services or complaints. Every site has a weekly meeting where the RHO imparts news, and any upcoming events and tenants can discuss any issues about the site. There is a virtual 300 group who we ask specific feedback questions to topic based. We conduct numerous satisfaction surveys throughout the year based on TSMs which are reported to the regulator.

Scheme Activities:

Mixed at each site, some have formally constituted social clubs that have activities most days, others just have occasional events such as a BBQ for the jubilee/coronation etc. Some sites have charities attend, or Wiltshire foods etc. On site staff do not provide activities or organise or manage them, they signpost and guide with ideas. We currently have an

intergenerational art project running with an involved resident group, uni physio students working on wellbeing and balance as part of their degree course. We offer 6-week wellbeing programme on our smart screens in the communal lounges this is undertaken at tenants' own risk.

Pets Policy:

It is voted on every 2 years by each site, we have about 60/40 mix in favour of pets, pet free blocks cause challenges occasionally on letting when applicants have pets and don't wish to rehome them as they will be refused for the offer. We also only accept dogs and outdoor cats in ground floor properties, and we have a 10% occupation limit on these pets at each block. Whilst this policy is not always popular with pet lovers, it has reduced the pet complaints from ASB to virtually zero. We have a few challenges around therapy pets as we do not view them as a service pet so make no exception outside our policy for therapy pets. Very difficult to take action against those who do not adhere to the policy as the courts are not willing to grant possession in such cases and very rarely grant injunctions to remove pets.

Infestations:

Yes, we have these outbreaks sporadically but can be very costly. We were doing continual preventative checks but found this was costly and didn't seem to stop the cases. Yes, we fund the treatments to ensure work is undertaken to a good standard and prevent spread, however we will recharge if there are multiple outbreaks in same property.

Decarbonisation and Net Zero:

Many of our properties have solar panels currently which reduces the overall utility costs for our residents.

Communal Lounges:

We have guidelines for users and generally external groups are not able to use the room unless residents have specifically invited them to do so and it's a function they are taking part in. We have allowed other agencies to utilise rooms temporarily such as the CAB.

Guest Bedrooms:

£25 per night – revenue goes into the service charge account to reduce overall service charge and to provide running costs and funds towards depreciation of furniture and linens.

White Goods:

Not supplied, however we have gifted items once PAT tested and in good condition if needed by incoming tenant i.e. homeless applicant

Mobility Vehicles:

Not allowed in the flats/studios must be stored outside or in a mobility scooter room. Bungalows generally store outside in their individual gardens. We have just introduced a £60 per annum charge for communal electric charging of all scooter users.

Appendix 12 – HA in England

Housing Association in England

Age of residents: Minimum age 60+

Originally HA was sheltered accommodation for retired tenants. This has evolved due to the Pension age increasing and tenants still working between the ages of 60 and 65. The older tenants who have been with us for a long-time have moved on through going into care homes or passing away, last year we experienced many void flats due to the ageing population of our tenants where we have now new tenants within the last year. The newer younger tenants moving in who live independently, don't want the same level of service or social clubs in house.

Mental health services in the UK are currently under immense pressure, and tenants referred for support often face long delays before receiving help. In the meantime, we can connect tenants to interim services for support: such as refer them to local Minds, Shelter, or council services for wellbeing help, citizens advice and age concern.

Service Description: Scheme Based

Our mission. We were set up to provide good quality accommodation, where people want to live, and are supported through our services to maintain their independence.

Our purpose. We provide suitable, affordable accommodation for people aged 60 years or over, in the local Council area.

Housing Stock for older people

Property Type	Number of units
Bedsit	5
1 bed	97
2 bed	0
1 bed bungalow	0
2 bed bungalow	0
Total	102

Managing the quality of the service:

We have published our Action Plan for 2025 following a review of our Tenant Satisfaction survey from 2024. We provide updates on progress at our regular tenant meetings and at our People Committee that oversees Tenant Satisfaction and Complaints.

The Housing Services Manager monitors all housing services, and the Chief Executive monitors overall business direction.

Registered for Independent Living Standards and due for assessment in June 2026.

Allocations:

Housing Association has an Allocation Policy, recently updated and reviewed in 2025. It sets out how HA will allocate properties and the eligibility criteria that apply to all tenants and applicants, including those nominated by the District Council. As a registered provider of Social Housing, HA has a duty to meet the Regulatory Standards set out by the Regulator of Social Housing. This policy has been developed in line with the Tenancy Standard.

This policy aims to:

- Make the best use of HA's available housing.
- Let properties quickly and appropriately, minimising the time properties are empty.
- Help tenants and applicants access homes, considering their needs and aspirations
Demonstrate that HA will allocate homes in a fair, transparent, and efficient way, without discrimination and in line with the Equality Act 2010
- Provide clear application, decision-making and appeals processes.
- Demonstrate how HA allocations contribute to the local authority's strategic housing function and sustainable communities.

To Allocated properties we allocate through several routes:

- HA meets its obligations in the nomination agreements made with the local Authority, LA. 50% of X properties and 75% of Y properties are allocated to their waiting list.

Assessing New Tenants:

In following our Allocation Policy 2025 and applicants' assessment process all new applicants are dated by their submission of completed application, to then make an appointment where we visit their current address and have an in-person independent living assessment and a financial assessment. This is to make sure they match our criteria and that we can provide the right housing needs for them.

We do carry out our own independent living assessment and Verification of details assessment (Financial) before offering a property to those that are nominated. HA offers Choice Based Lettings (CBL) to its own housing waiting list.

Rents and Service Charges

	X House	Y
Rent - Management charge under rent costs	£407.76 - £549.13	£469.94 - £550.62
Service Charges includes: ➤ Heating in communal area (25% of cost) ➤ Electricity ➤ Cleaning Salary ➤ Cleaning Materials ➤ Carpet cleaning ➤ Window cleaning ➤ Plumbing and heating maintenance ➤ Electrical maintenance ➤ Fire alarm maintenance ➤ Laundry maintenance ➤ Lift Maintenance ➤ Other maintenance ➤ Grounds ➤ Insurance	£224.62 - £244.56	£188.17 - £224.95

<ul style="list-style-type: none"> ➤ Hot water maintenance ➤ Pest Control ➤ Management charge ➤ Depreciation ➤ <p>Support Charges – not eligible for housing benefit</p> <ul style="list-style-type: none"> ➤ ➤ Housing Support (HSO) 40% support 60% is building management. ➤ Agency/HSO cover ➤ Tynetec call system ➤ Tynetec call system maintenance ➤ Careline monitoring fees ➤ Water ➤ Electricity ➤ Gas 		
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Management Charges: 12%

Service Charge Caps:

In 2024, HA provided a one-off rebate subsidy to tenant service charges of some £65,000. In 2025, HA has chosen not to pass on the full cost of providing grounds maintenance and cleaning services, leading to a £45k reduction in potential service charges. This decision was taken to help mitigate some of the potential increases tenants would face. These contracts are also due to be re-tendered in 2025/26 with active tenant involvement in setting the specification and quality requirements. Once new contracts are in place, the full costs of providing these services will once again need to be met in full by the service charge. The reasoning behind this was to soften and offer support around cost of living.

Also, not fully recharging the seagull pest control at X House.

Staffing:

CEO

Finance and Business Manager

Housing Service Manager

Maintenance Service Manager

2 x Housing Support Officers

Housing Support and Projects Officer

Our front of house services for customers to access us are Mondays-to-Fridays 9am till 1pm. We allocate a Housing Support Officer on each scheme within these time periods at each House. In total of team members, including management altogether are seven staff members. For our Housing Support Officers following their job descriptions the average

amount for their duties is 60% building management administration and 40% supporting tenants.

Staff Recruitment and Retention:

We successfully hired an apprentice to fill in gaps in tasks, and duties of covering HSO on planned leave. Review terms and conditions for 2024 will increase HSO annual leave 23 days to 28 years to remove the five years wait of length of the employment. Opportunities to have birthdays as off and Bank Holidays as well.

Supporting People funding:

No SP funding, withdrawn in 2015.

The Lifeline charge would be part of the Support included in their full rent amount. Tenants who are entitled to receive Housing Benefit or Universal Credit has it paid directly to them. The support charge is ineligible for Housing Benefit, so Tenants are expected to pay this themselves. Some support charges are legible for Universal Credit i.e. communal laundry facilities, communal living space etc. Due to Housing Association housing Tenants aged 60 plus and we are classed as Sheltered accommodation, most of our Tenants receive Housing Benefit.

Challenging Behaviour/ASB:

Not increased, reports of anti-social behaviour are non-existent, it more low level. Staff are trained to understanding anti-social behaviour and how to signpost.

Cleaning:

Our Top Mops external contractors are currently being undergoing a new specification and project on cleaning procurement with tenant engagement with survey and focus group for feedback on current experiences. Top Mops staff are present on both schemes from 8:30am- 1pm on weekdays.

Heating:

Retrofit survey and review of our heating that will be determined via the energy efficiency standards for tenants in our schemes to have an Energy Rating Band C with Government Target for 2030. Following how both our schemes work around heating are as follows:

- X House has communal hot water and heating.
- Y – Phase 1 has one heating network and hot water
- Y – Phase 2 tenants have their own domestic boilers for their heating and hot water needs.

Community alarm monitoring: PPP Taking Care under Axa Healthcare

Alarm Equipment/Digital Switchover:

We are ready to go with Digital switchover but Taking Care have been switching over themselves and are yet to connect us up. Hopefully, this will be done soon.

The new Sentinel system used the existing wiring in the building for the new Tynetec equipment.

Grounds Maintenance:

We are currently reviewing our grounds maintenance external contract where we will be planning to be appointing a new contractor for 1st December 2025.

Resident Involvement:

Not signed up to Together with Tenants, but open to exploring and reviewing how it might work within our small residential services. We have a tenant meeting every six months to discuss the scheme, life issues and formal minutes and agenda catered for individual schemes, Board and CEO attendance.

Scheme Activities:

Events are logged on the Daily Diary, assessment of number of participants, impact and budget are recorded. The activities are community led by the where we do attend/host on occasions such as monthly meetings of coffee meetups, fish n chip lunches, BBQ annual hosting.

Pets Policy:

HA, as stated in the Tenancy Agreement and Tenant Handbook, has a No Pet Policy. However, we do have a legacy pet issue of small pets.

Infestations:

We have cleaners in regularly, using ant pest control methods and hire for external contractors when necessary and shared to us by the tenants to allow us to action. To our knowledge we do not have any – property maintenance policy.

Decarbonisation and Net Zero:

The organisation is currently calculating its Carbon footprint.

Our 2025 stock condition survey includes retrofit assessments to inform potential future improvements via an options appraisal report.

In 2024 we commissioned building physics reports (via the Greengage consultancy) to better understand our homes and consider future options. These will feed into our current options review.

In March 2025 we benefited from a Heat Networks efficiency grant from the government to fund a review of our X House scheme communal heating and hot water systems. This report will also feed into the wider options review.

Retrofit options to convert from gas to electricity all currently lead to higher costs for tenants given the current utility pricing structure.

Investment in gas and improving its efficiency may bring down prices and carbon emissions in the short term, but do not address the longer-term net zero agenda imperative.

This requires a strategic approach and is part of a future Board away day discussion.

Communal Lounges:

Tenants used these communal lounges to host bingo evenings, coffee mornings and events such as memorial if tenants wish to use these areas for their needs. We are planning to review people's count of accessing spaces, as they are outdated style and potentially seen as too large in space and under use in number of tenants accessing. We did think about external hire, but we have no caretakers. This can be a building security issue as well. Housing Support Officers and tenants committee to have church service for housebound tenants.

Guest Bedrooms:

The cost for a guest bedroom is twin beds, at the value of £25 a night. Goes into an income line. Review last year where it only made £250 income from guest room bookings, however currently this year, the usage of guests' bedrooms has increased.

White Goods:

We do not supply any white goods in our flats. Tenants supply their own, which is usually a Fridge/freezer, cooker & possibly a washer machine if space permits. On both schemes we have communal area facilities laundry room, and outdoor laundry airing space for washing lines.

Mobility Vehicles:

We have charging stations outside each building where we have green garage's location that also add charging electric stations, these are fees added to the tenants' service charges if they have signed up to using the garages. We are currently looking at renewing them but not increasing the number/volume.

Appendix 13 – LA in England

Local Authority in England

Age of residents: Minimum age 55+ with benefit criteria – then 60+

The age profile of residents has changed considerably in recent years and last year 50% of new tenants were of working age. Many do not need or want the Independent Living service or engage in the communal life of the scheme. This situation is part of the rationale for changing the eligibility criteria.

Service Description: Scheme Based

Each of the 61 Schemes will have a named Independent Living Coordinator allocated to the scheme. Currently, we have around 1 Coordinator allocated to 3 schemes, or in terms of properties, around 80-90 properties per ILC.

Low level housing management with additional advice and signposting for additional housing and health wellbeing. This may include referrals through to appropriate health departments or agencies to support with specific areas of housing or social needs.

Supported to ensure home safety and personal safety with referrals for assistive technologies and fire safety advice. Independent Living coordinators will support the effective management of communal areas including safe water and fire safety checks, Independent Living Coordinators will report communal damage, ground and waste issues and will support with reporting community issues including Anti-social behaviour both internal and external to the properties

Housing Stock for older people

(collected from 2023 – Now approx. 150 less properties owing to de-designation owing to priority homelessness requirements)

Property Type	Number of units
Houses	7
1 bed	1697
2 bed	3
3 bed	7
4 bed	2
1 bed bungalow	333
2 bed bungalow	38
Maisonettes	5
Total	2092

Managing the quality of the service:

Regular scheme inspections; tenant satisfaction processes; compliance with Decent Homes Standard and regulatory consumer standards; refurbishment through Modernising Housing for Independent Living programme; undertaking housing condition surveys across stock. Quality audits of support planning and assessment by IL staff; internal audit of compliance with policies and procedures

Meets statutory standards under the Social Housing White Paper and regulatory consumer standards. Works under LA strategy “Homes Fit for the Future” covering vulnerable independent living and integration with health and social care partnership working. As a local authority we have numerous roles and teams supporting the quality assurance, but our service is a by-product of a considerably larger department and its self-sufficient in terms of quality assurance. KPI’s across a range of indicators are reported monthly allowing Independent Living complaints, compliments and TSM feedback are separated from general needs to provide an overview of quality assurance. Internal low level quality assurance completed by inhouse calls and dip testing to newer and existing residents.

Allocations:

Through LA HomeLink (choice-based lettings); vacancy adverts posted publicly. Some discretionary direct lettings (e.g. housing-to-health referrals) Local Council lettings has a default situation in which a resident aged 60+ will only be able to bid on Independent Living properties, as such, this increases the likelihood of ‘Unsuitable’ nominations such as individuals with drug and alcohol related issues, untreated mental Health issues and potential ASB issues owing to lifestyle. As a result of increased issues in some schemes, we have embarked on resident consultation to consider raising the age criteria from 60 to 67 and may work with lettings to consider further restrictions on some individuals who may have untreated disorders that the service may not be able to support effectively and may cause additional distress to other vulnerable resident within schemes, this especially applies to High-rise properties and corridors schemes where ASB is amplified

Assessing New Tenants:

Pre-tenancy eligibility checks, income and benefits entitlement, health/disability requirements; tenancy sign-up meeting; post-move-in visits by Independent Living Coordinator. Housing-to-Health referrals include hospital discharge needs assessments. The aforementioned are light touch national requirements for consideration of housing. Following successful sign up, the Independent Living coordinator will complete an initial home visit and complete a ‘Housing and Wellbeing assessment’ this covers a range of low level housing management questions and wellbeing questions that may not have been picked up during housing applications.

Rents and Service Charges

There are 61 individual schemes in LA and rents and S/Cs are not standardised. In particular new build corridor and bungalow schemes will have higher rents. Examples given are for 1 bed non-new build. There are also 3 high-rise schemes that have higher rents

Courtyard – Rent = £86.02 – S/C £30.68

Corridor – Rent = £97.27 – S/C £32.08

Bungalow Rent = £93.07 – S/C £30.68

Management Charges: n/a

Service Charge Caps:

All service charges need to be approved by Council. In practice they increase in line with rent increases

Staffing:

Head of Service

Independent Living Manager

3 X Independent Living Team Leaders

23.5 FTE Independent Living coordinators

2 X FTE Activity Coordinators

0.75 admin support

A review has been undertaken, and proposals are out to consultation with tenants. Essentially these are to increase the age-related eligibility criteria to 67 (60+ in receipt of disability benefit), additional support for Lettings, enhancing the lettable standard of properties, handyperson service and exclusions on untreated drug and alcohol. It is anticipated that the number of schemes will reduce over the next 5 years although no definitive number has been agreed. So far 2 schemes have been decommissioned, and a 3rd is proposed. Factors influencing decommissioning include stock condition, demand and ward demographic factors and concentration of supply. Options appraisals are undertaken on schemes to be decommissioned to determine future use – so far this has been conversion to temporary accommodation, conversion to family accommodation

Staff Recruitment and Retention:

Our service has remained fairly stable over the previous 10 years, albeit we have retained numerous long serving staff. Adverts for the role of ILC usually gather numerous applications (27 applications for the most recent ILC role advertised). Many applicants from a care background so usually require intensive induction to understand many other elements of social housing and low-level tenancy management. Job description remains the same for many years and may not always entice the 'correct' applicants as it may be care orientated in its approach.

Supporting People funding:

No SP funding.

Challenging Behaviour/ASB:

We have seen an increase in drug and alcohol related asb and asb associated with untreated mental health. This is often associated with those who have been part of the homeless community. This forms part of the rationale for proposed eligibility changes

Cleaning:

They are directly employed Caretakers and Cleaner as albeit reporting to different service areas and departments

Heating:

Most schemes have tenants own supply. Some schemes benefit from district heating and a service charge is applied. There is one scheme which has a communal gas-powered heat supply – again a service charge is applied. Unaware of HNR?

Community alarm monitoring: In-house provider

Alarm Equipment/Digital Switchover:

Completed 24/25. Have migrated to fully dispersed alarm provision with linked hard-wired smoke and CO2.

Chiptech supplied the equipment for A2D transition. LA is currently out to tender for a new dispersed alarm supplier

Grounds Maintenance:

Directly employed different Council department

Resident Involvement:

LA has numerous resident forums, no specific forum for older persons or independent Living. Regular residents' meetings are held to ensure feedback is captured

Scheme Activities:

We employ 2 FT Activity coordinators. Most recent KPI's suggested that in 1 month, over 1000 activities were available to residents. This covers all sorts of activities from traditional older persons activities such as bingo, coffee mornings, social gatherings to working with no end of local charities and support providers to create workshops, boxing, chair-based exercises, drumming, and social dining. We are hugely supported by local external agencies and have worked with universities, colleges etc for the likes of IT classes and wellbeing sessions

Pets Policy:

There is a pet policy stating that permission must be obtained to keep a dog or a cat. No dogs are permitted in corridor schemes. There are designated pet friendly schemes. In practice the policy is not robustly applied

Infestations:

Not recently. Any works required would be unlikely to be charged

Decarbonisation and Net Zero:

The stock condition Survey identifies measures required to bring properties up to EPC C. Failure for a property to achieve this rating will be a factor in decommissioning decisions

Communal Lounges:

In many schemes these are under-utilised. There are also can be issues with individual groups of tenants monopolising and disagreements as to how they should be used (should there be a tv, pool table etc). Generally, we do not allow outside groups to use these facilities although outsiders are welcome to join some organised communal activities

Guest Bedrooms:

We have 2 guest rooms available over 2 schemes, these are within the largest of our schemes. We charge £20 per night for these. It's usually paid in cash and this is banked if excessive or used to maintain the room or used to support scheme activities within that scheme.

White Goods:

There is one scheme where white goods are provided as part of the tenancy (inherited from an RP) – these are replaced when broken. Individual tenants can have a 'furnished tenancy' with appropriate charges added to the rent, but this is rarely used.

Mobility Vehicles:

Just under 50% of our schemes have mobility scooter storage including all high rise and corridor schemes (other than 1). The charge for storage and charging is £1.39. Further capital funding has just been secured to provide further scooter storage at schemes

Appendix 14 – HA in England

Housing Association in the North of England

Age of residents: Minimum age 55+

The age profile has changed in recent years with younger residents moving in.

Service Description: Scheme Based

The Independent Living Strategy has the following aims:

1. To enable older people to live independently in their own homes for as long as possible
2. Where required, increase the provision of specialist housing for older people
3. To ensure our accommodation and services provide value for money and a quality home and service offer
4. To promote the health and well-being of older people
5. To promote older people's involvement in the community and with Progress Housing Group
6. To ensure our service offer for older people meets the needs and aspirations of our diverse range of people

Housing Stock for older people

Property Type	Number of units
Bedsit	20
1 bed	815
2 bed	93
1 bed bungalow	245
2 bed bungalow	7
Total	1180

Managing the quality of the service:

The Independent Living service is integrated into multi-disciplinary Area Housing Team's. The quality of the service is overseen by the Area Housing Manager, and a Regional Housing Manager takes responsibility for the portfolio across the Area Housing Teams. Performance / service quality is managed via tenant satisfaction measures, tenant voice activity and an ongoing tenant journey project.

We have a Continuous Improvement Team who focus on service improvement across the Area Housing Team's and relevant portfolios. They have recently commenced the Independent Living section of the tenant journey project.

Allocations:

Choice based lettings unless difficult to let. We do support the work of partner local authorities through the use of direct matches.

Demand remains strong across the Independent Living portfolio however one or two schemes are more challenging than others to let. Reasons for this include location and property size.

Substance misuse, complex needs and reduced mobility are all challenges as is a misunderstanding amongst some partners about what Independent Living is and isn't.

As highlighted our tenant journey project and also a strategic review of Independent Living aim to overcome challenges and improve the tenant experience.

Assessing New Tenants:

We have an in-house Tenant Sustainability Team (TST) who review an application before an offer is made. Focus of TST is on affordability, support needs, health needs, suitability and property type.

Rents and Service Charges

Property Type	Rent
Bedsit	£90 per week + £15 service charge.
1 bed	£105 per week + £15 service charge
2 bed	£113 per week + £15 service charge
1 bed bungalow	£105 per week + £15 service charge
2 bed bungalow	£120 per week + £20 service charge

Management Charges:

We charge a 15% fee – this is based on the property related service charges (not external management fee, personal charges etc).

Service Charge Caps: n/a

Staffing:

10 Independent Living Coordinators responsible for front line delivery of the service. They are split into 4 Area Housing Teams and receive support from colleagues in the team with issues such as income collection, community safety and lettings.

Each team is managed by an Area Housing Manager.

The ILC spends approximately 2 hours on each of their 3 schemes per day.

They complete a daily call with anyone who requests one.

They don't have support plans.

Staff (Independent Living Coordinators) are allocated three schemes to manage and are responsible for approximately 120 properties each.

Staff's key responsibilities are as follows:

- 1) Make contact with Tenants to check on welfare according to their needs and requirements.
- 2) Signpost Tenants to other providers of support, advice and advocacy.
- 3) Complete a personal information sheet with new Tenants and review annually or as required with existing Tenants.
- 4) Respond to emergency situations during working hours at schemes and provide practical assistance to Tenant's on a temporary basis until family members or emergency services arrive.
- 5) Provide a link where required between the Tenant, family, friends and external agencies.
- 6) The Independent Living Coordinator will, where applicable, positively promote Extra Care and be willing to engage with external agencies.
- 7) Carry out systematic monitoring and inspection of Independent Living schemes to provide safe, secure, clean and well maintained communal areas and services.
- 8) Assess the housing need of prospective Tenants when requested to do so by colleagues or partner organisations.
- 9) Carry out viewings and sign ups with prospective Tenants and positively promote the property and communal facilities of the scheme.
- 10) Provide information, advice and guidance to Tenants on services within the scheme and the wider local community to promote independence.
- 11) Liaise with tenants on maintenance issues when required by identifying, ordering and co-ordinating work to be carried out and followed up.
- 12) Ensure regulatory and health and safety compliance at all times, in line with health and safety policy and procedure.
- 13) Deal with low level nuisance and anti-social behaviour at the first point of contact and ensure all systems are updated accurately and escalate where necessary.
- 14) Carry out weekly health and safety inspections of communal areas in line with organisational health and safety policies.
- 15) Take positive steps to resolve Tenant dissatisfaction and be the first line of contact for Tenant complaints.
- 16) Visit tenants at regular points as and when required including post sign up, pre termination and termination.
- 17) Carry out regular checks of pull cords, keys and smoke alarms at individual properties.
- 18) Review Tenant's circumstances at regular intervals and carry out Person Centred Fire Risk Assessments where necessary.
- 19) Take a lead role regarding the organising and facilitating of activities and events.
- 20) Organise, chair and facilitate regular house meetings.
- 21) Use a number of different software packages as part of the role.

Staff Recruitment and Retention:

We have noticed a reduction in qualified staff applying for vacancies and an increased withdrawal from the recruitment process eg: non-attendance at interviews etc.

We have also noticed increased turnover particularly amongst new starters.

To address this we have scaled back the job description and person specification placing increased focus on values, transferable skills and a willingness to learn.

Supporting People funding:

No SP funding and Lifeline charges now have to be self-funded.

Challenging Behaviour/ASB:

We have seen an increase. Schemes are changing with an increase in younger applicants and applicants with complex needs. Issues appear to be magnified in a scheme setting. We do encounter some issues with tolerance on occasions.

Cleaning:

The majority of cleaning is completed by Domestics who are directly employed by the organisation however some schemes have contract cleaners. Hours on site is based around scheme size and tenant preference.

Heating:

We've upgraded several schemes' plant rooms and, where possible, given Tenants more control over how they operate their heating.

Despite this none of the schemes are individually billed for their heat usage. Instead, costs are pooled and split collectively among all residents.

We will need to review how we currently manage billing, metering, and Tenant communications across all communal schemes.

Community alarm monitoring: Progress Lifeline

Alarm Equipment/Digital Switchover:

Currently working with TECS advisory to identify the most appropriate solution.

Tunstall. The decision to remove hard wired systems will depend on the advice from TECS advisory.

Grounds Maintenance:

Contractors

Resident Involvement:

We are signed up to the NHF standard. We have a high degree of involvement from Independent Living Tenants, and this is facilitated by our Customer Voice Team.

Scheme Activities:

We employ two Customer Voice activities coordinators who directly deliver or arrange through third parties the delivery of activities.

Pets Policy:

No pets are allowed in integral schemes however birds and fish are permitted. The presence of pets still occurs and still causes us some housing management challenges.

Infestations:

Annual service charge for pest control at some schemes.

Decarbonisation and Net Zero:

We have been delivering lighting and heating improvements to support sustainability and reduce tenant bills.

Communal Lounges:

The only challenge we have with communal lounges is that they are underutilised. We allow external groups to use the facilities and have written guidelines in place.

Guest Bedrooms:

We charge £15 per night for guest rooms.

White Goods:

No white goods provided

Mobility Vehicles:

We will deliver the development of a number of new scooter storage facilities during this financial year and will develop a new scooter policy.

Appendix 15 – HA in England

Housing Association In many parts of England

Age of residents: Minimum age 55+

The services are 55+. Most of the services have reported that the demographic has changed to younger customers, often still working rather than pension age.

There has been a reported increase in single, male customers. There has also been an increase in customers with higher needs such as mental-health issues, and/or substance misuse.

Service Description: Scheme Based

HA's Retirement Living service provides housing and support to customers aged 55 and above, helping them to maintain their independence and continue to do the things they value for as long as possible. Accommodation is self-contained and the majority have a community alarm service. Some Retirement Living services may have communal facilities for use by customers.

The aim of HA Retirement Living service is to provide accommodation which will support customers by enabling them to continue to live independently within the community.

There are 2 types of Retirement Living services:

- Unstaffed - alarm only. Each property has an alarm system linked to a monitoring centre for help in an emergency.
- Staffed - in addition to the alarm system there will also be on-site support available from a member of staff.

Housing Stock for older people

Property Type	Number of units
Bedsit	303
1 bed flat	3454
2 bed flat	317
3 bed flat	24
4 bed flat	1
1 bed bungalow	370
2 bed bungalow	113
3 bed bungalow	2
4 bed bungalow	1
1 bed house	3
2 bed house	2
3 bed house	17
4 bed house	1
Total	4611

Managing the quality of the service:

HA's Quality & Improvement team have developed and implemented a quality management framework to ensure there is robust governance process in place. The framework provides assurance to all stakeholders that quality will be monitored, measured and maintained across all services.

The team have introduced the 4 lines of defence model:

Level 1 - Self assessments - audits completed by Managers

Level 2 - Peer audits, completed by managers from nearby services

Level 3 – Quality Audits, completed by Quality Advisors from the Quality & Improvement team

Level 4 – Collation of external audits (Commissioners etc.)

A risk-based approach will be used to prioritise service audits when arranging Quality audits and high-risk services may be audited more than once in the given period.

Any non-compliances which arise from audits will then be reviewed and completed as part of an action plan.

Our Quality Management System is accredited to the ISO 9001:2015 standards and receives ongoing validation annually.

There is a Quality and Improvement Team, with Quality Advisors who conduct service audits, and monitor the self-assessment and peer-assessment schedule within Care and Support.

There is also a group audit team that will complete audits in line with requests from the HA Board.

Accreditation with erosh Independent Living Standards

Allocations:

Allocations vary dependant on the location and agreement with Local Authority. There is a mix of choice-based lettings and direct lettings.

Some areas such as Ipswich, the Local Authority have sole nomination rights.

There have been difficulties reported in unsuitable nominations around accessibility for example, nominations for a flat with a bath when the applicant requirements level access. Some areas report an increase in nominations for applicants with a history of ASB and violent offences. However, we can reject, if they are too high risk, following a risk assessment being completed.

The North-west and areas of London report struggling to let properties. It has been reported that bedsits in all areas hard to let.

Services keep their own waiting lists to try to combat low demand. There are also incentives in place across HA, such as: decorating vouchers, providing carpets and white goods and the refer a friend scheme.

Services also report advertising across other platforms such as housing care, approaching local hospital teams, approaching private lettings agents if needed, and putting To Let signs up at the service.

Assessing New Tenants:

Our Retirement Living services assess new tenants prior to sign up with a needs and risk assessment, and a Pre-tenancy affordability toolkit. Former landlord references are also requested, or two personal references where the applicant has a gap in housing or is a homeowner.

The Housing Management processes including Retirement Living allocations and assessment is currently under review as we look to move to a paperless assessment and booking in system.

Upgrading Programme

Our Retirement living Investment Programme has been ongoing for over 9 years and is now coming to an end. Over 50 services benefited from this scheme. The aim was to modernise our offering to our over 55's living in our retirement living schemes, with improved lighting, open communal living spaces and bright clean new décor and flooring. The customers were consulted on the design, furnishing choices and suggestions for how we improved the building.

We conduct option appraisals on a case-by-case basis.

Rents and Service Charges

Property Type	Average of Rent	Average of Eligible Service Charges	Average of Ineligible Service Charges
Bedsit	£94.82	£51.81	£8.84
Bungalow	£104.97	£23.86	£0.17
1	£102.09	£25.91	-£0.01
2	£113.92	£17.60	£0.53
3	£123.15	£1.49	£11.53
4	£120.00	£17.52	£0.00
Flat	£103.50	£49.55	£9.68
1	£102.12	£50.27	£9.99
2	£117.21	£43.00	£6.25
3	£122.17	£34.64	£10.82
4	£114.55	£4.13	£0.00
House	£124.52	£25.69	£3.15
1	£119.44	£36.20	-£0.09
2	£133.08	£35.34	£0.80
3	£123.90	£22.85	£4.18
4	£133.24	£23.00	£0.00
Maisonette	£133.31	£54.60	£0.47
2	£126.20	£54.41	£0.48
3	£147.53	£54.99	£0.47
Average Overall	£103.21	£46.88	£8.58

Location	Property Type	Average of Rent	Average of Eligible Service Charges	Average of Ineligible Service Charges
Midlands	Bedsit	£80.40	£31.60	£3.76
	Bungalow	£96.25	£32.25	£0.36
	Flat	£97.82	£45.61	£3.94
	Maisonette	£126.20	£54.41	£0.48
Midlands Overall Average		£97.35	£43.66	£3.48
North	Bedsit	£86.12	£52.15	£11.85
	Bungalow	£105.27	£23.01	£0.13
	Flat	£99.95	£49.66	£11.68
	House	£122.82	£16.60	£1.81
North Overall Average		£100.18	£46.11	£10.13
South	Bedsit	£103.19	£52.54	£6.45
	Bungalow	£114.66	£27.04	£0.66
	Flat	£116.61	£50.38	£4.93
	House	£128.40	£46.44	£6.20
	Maisonette	£147.53	£54.99	£0.47
South Overall Average		£114.63	£50.26	£5.09

Management Charges:

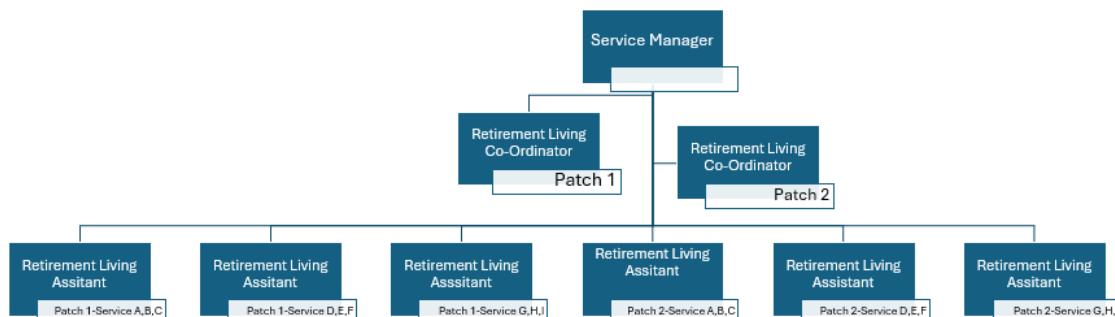
There is a 10% charge to cover management and supervision of services.

Service Charge Caps:

Mergers, Acquisitions and Stock Transfer agreements sometimes require Riverside to cap service charges for an agreed period of time.

Staffing:

Services are covered by a Retirement Living Co-ordinator and a Retirement Living Assistant. The Co-ordinator will cover a wider patch of services. The Assistant will have a base of 2-3 services, splitting their time between each.



A handful of services have access to a support worker where SP funding is still in place. The team is managed by a Service Manager. On average the team spend 15-20 hours a week at each staffed service.

Staff do not provide direct support, however, cover annual safety plans and reviews, housing management tasks, signposting customers to support, health and safety checks, monitoring of the PIR systems and welfare calls.

Example of Job Roles between RLC and RLA	
Retirement Living Co-Ordinator	Retirement Living Assistant
Co-ordinates viewings and sign ups	Assist with viewing and sign ups
Development of action plans to address hard to let properties	Assist with addressing hard to let properties
Monitor PIR systems	Monitor PIR systems
Monitoring of service contracts/Key contact for contractors	Carry out first visits
Addressing rent arrears in collaboration with income officers	Sign post to relevant housing management support
Lead on customer involvement	Promote and deliver health and wellbeing activities on scheme
Lead on ASB complaints with the community safety team	Day to Day office Admin
Safeguarding lead at service level	General service health and safety including reporting repairs

HA, have central teams that can offer support with income maximisation and affordable warmth advice. There is internal funding such as Helping Hands. The Helping Hand Fund is available to HA tenants (including those in Care and Support) experiencing significant financial hardship through one-off grants.

Staff Recruitment and Retention:

Services report that recent recruitment has gone well and there has been plenty of interest in roles.

Supporting People funding:

Yes, in Doncaster, Knowsley and St Helens

Intensive Housing Management charges - the majority of services report receiving this.

Challenging Behaviour/ASB:

A quarter of 24 responses, from a spread of Retirement Living patches, reported an increase in ASB. They report an increase in customers with higher support needs: mental health concerns and/or substance misuse issues. At times this can lead to altercations with other customers.

Also reported were issues around customer's visitors causing problems at the service, for example, knocking on doors late at night, using the laundry and shouting outside if they can't get in. There are reports of drinking and threatening behaviour in communal areas, harassment of other customers, threatening staff and erratic behaviour. Staff report this has led to long standing customers moving out, and a fall in customer engagement as others stop using communal areas and coming to activities as they can feel intimidated.

Cleaning:

Services with communal areas have centrally procured cleaning contractors. Times vary dependent on the size of the service. On average services receive 2 hours, twice a week. Larger services report cleaners attending 2 hours, 4-5 times a week.

Heating:

Most services have communal gas heating. Some services are fitted with electric storage heaters. Any changes to heating are carried out as part of the Retirement Living Investment Program on a service-by-service basis.

From January 2026, HA will be treated as a heat supplier or a heat network operator, standards are set to comply within the regulations to demonstrate our heat networks are efficient and contingency planning is in place for emergency outages and customers are compensated for any loss of heat.

Community alarm monitoring:

Appello is our main monitoring provider, accounting for 231 schemes overall. We do have some schemes that are monitored by other providers following acquisitions etc. There is currently a project being undertaken to bring them under Appello as soon as possible. For example, 7 schemes migrated from Careium monitoring to Appello this month.

Alarm Equipment/Digital Switchover:

We have already replaced all our dispersed equipment – 120 homes now have fully digital dispersed units.

Regarding our hard-wired systems, we have 5 schemes where we have installed analogue to digital convertors, and these schemes now successfully work over digital. We are about to begin a roll-out programme of these convertors in the remaining 190 schemes that will take digital convertors. We are in the process of procuring a contract to install fully digital equipment in services that will not take a convertor.

There are several suppliers of alarm equipment across the estates. Tunstall provides the majority, but we also have, Chubb, Tynetec, Appello and Essence (dispersed) in schemes. Chubb also now have a contract as supplier of our future dispersed units. This mixture of

suppliers is due to factors such as acquisitions, where we take on a scheme with an existing equipment solution in place.

There is potential for changes within the estate for various reasons. We are currently testing our recently tendered analogue to digital converters in schemes with a plan to roll them out across the estate. This will flag up some schemes where this solution isn't effective and will require procurement of a full digital solution in them. This could result in a hardwired solution being removed with dispersed lifeline equipment or a fully digital hardwired solution being sourced and installed.

Grounds Maintenance:

All grounds maintenance activity is carried out by centrally procured contractors.

Resident Involvement:

HA has adopted the National Housing Federation's 'Together with Tenants' Commitments which has informed the Co-Production and Customer Involvement approach.

Every service has a Working Together Plan which details how and in what areas customers will be involved in service design and delivery. This plan is developed with customers and reviewed at least annually.

Customer Involvement and Coproduction is a standard agenda item on all Team and Management meetings.

The matrix below demonstrates minimum requirements of themes of involvement for Retirement living. Services should provide flexible, inclusive and accessible opportunities for involvement as stated below:

Involvement Opportunity	Retirement Living staffed	Retirement Living unstaffed
Scheme Resources (Newsletters, Welcome Packs, Information Noticeboards etc)	x	x
Entry & Exit Surveys	x	x
Social Inclusion/Health & Wellbeing Activities	x	
Service- wide Engagement Event (sharing/discussion of information surrounding service and/or scheme with set agenda, e.g. tenant meetings)	Monthly	Quarterly
Local Community (Sharing of services, training/education available)	x	x
Local & National Policy & Procedure	x	x
Recruitment of staff and volunteers	x	x
Refurbishment works inc. Supported Housing asset review, retirement living investment plan, Cyclical Redecs	x	x

Nationally, services report a struggle in finding external support to hold activities and general engagement levels from customer are low in many services.

Scheme Activities:

In our staffed services there are usually have coffee mornings at least weekly and a service wide engagement event/customer meeting monthly.

Dependent on customer interest and local engagement, services also report lunch clubs, bingo nights, quiz nights, art and craft sessions, keep fit sessions, walking groups, health and safety sessions and advice sessions. There are also annual events such as Christmas parties.

Where there is interest, services will support customers in arranging trips. These have included canal boat trips, outdoor swimming and fundraising events.

Services in Cumbria hold joint pool competitions with one of our local Young People Services. Staff will provide food and refreshments for internal events and will attend coffee mornings and customer meetings to share information and take on feedback. External trips are customer led with staff supporting with co-ordinating transport.

Staff will support customer in promoting any events they wish to run.

Financing for events varies from local petty cash for coffee morning, accessing funding grants from Riverside, and some customer funded.

External agency involvement is dependent on location. Cumbria services have a volunteer from MIND who attends the service monthly, Newcastle services have access to SEARCH, a Newcastle based volunteering service. Services also use local groups such as AGE UK to support customers in completing forms.

Retirement Living services are entitled to apply for grants through Baptist Housing Trust for Health & Wellbeing activities, and for small capital improvements where Health & Wellbeing could be improved.

Pets Policy:

HA's tenancy agreement states that customers who want/have pets must have prior written permission. If a home has shared areas, consent may only be given if customers have medical needs and the pet is required as a support/therapy pet. There may be a need to restrict pets from certain areas to protect other customers. Customers are responsible for any damages caused to their home or shared areas by any animal kept or visiting their home.

There is a national Pet Guidance Procedure which states customers are only allowed up to 2 pets (larger pets such as cats / dogs / large reptiles / large birds such as a parrot) per household (house / bungalow) and 1 pet permitted within a flat / maisonette with no direct access to a garden. This procedure allows Retirement Living services to set their own local approach to pets. Many of our services with communal areas allow small house pets, with dogs restricted to homes that have their own entrances.

There have been a few reported issues, mainly where customers have allowed their pets into communal areas. There have been several complaints about noise nuisance from dogs barking. There have also been concerns raised when customers go into hospital or pass away and staff are having to find new homes for the pets.

Infestations:

Most services have reported no issues. Those that have, had contractors brought in to deal with infestations. These treatments are service chargeable.

Decarbonisation and Net Zero:

HA's Asset Management strategy 2023-26 includes a programme of works to bring properties up to EPC C through the course of standard investment works and retrofit work (part funded

by the Social Housing Decarbonisation Fund). The most recent data indicates that for Riverside stock, 67.2% is EPC C and above.

The aim is for all stock to reach minimum energy efficiency EPC Band C by 2030, then on to net zero carbon by 2050. This will have a direct impact on the provision of affordable warmth for our customers.

Communal Lounges:

The majority of services have reported no issues. The most common reported issue is with engagement in the lounge which appears to be linked to changes in the demographic at services.

Some services have had ASB issues with customers drinking/sleeping and/or creating noise nuisance.

External groups are allowed to use the lounge as long as the service provided is open to customers. Few services have reported external agencies using the area. Those that have lounges, reported yoga, art and craft sessions taking place. All visitors are expected to sign in and are taken through the information for visitors and contractors.

In line with the HA Retirement Living Handbook, colleagues should identify the risks associated with any social activities taking place within communal facilities and include this in scheme health & safety inspections and any appropriate risk assessments.

Guest Bedrooms:

In line with our Guest room guidance the guest room charge should be decided upon by the customers of the scheme.

The minimum guest room charge is £5.00 per night. Services report a cost of between £5-£12.

The guest room charge covers the running costs of the guest room, e.g. heating, lighting and cleaning and includes a small surplus which should be used to improve the guest room facilities. If improvements to the guest room are not required, any surplus can be spent on other scheme items with the agreement of the customers. Services report this has been used to support running day trips and activities for customers.

As a minimum the following is provided:

- Tea and coffee making facilities which are replenished after each visit
- Bed linen, including duvet and pillow covers

If a TV is installed, then a separate TV License must be obtained for the room.

To assist with setting the guest room charge, a guest room budget is created in association with line management. Budget details are presented to customers at the service charge meeting.

White Goods:

White goods are not provided in most cases. With hard to let properties this may be provided as an incentive, along with carpets and/or decoration vouchers. Any of these items provided are formally gifted on move in and become the customer responsibility.

Mobility Vehicles:

With the progression of the Retirement Living Investment Programme many services now have scooter rooms. Mobility scooters should be stored in these room when available.

If the area is at capacity, a waiting list is produced so others can make use of it when space becomes available. Where safe to do so, customers may store mobility scooter in their flats. Mobility scooters must not be left in hallways.

Customers are aware of the legal requirements associated with owning a scooter. They are also informed as per our rechargeable repairs process that they will be held responsible for any damage caused by their mobility scooter.

Each customer and/or their family are responsible for the proper disposal of their mobility scooter.

Colleagues ensure each customer who owns a Mobility Scooter has completed the 'RL Mobility Scooter Agreement Form' which enables HA to keep a record of who owns mobility scooters in each service for health and safety purposes.

Appendix 16 – HA in England

Housing Association in the South of England

Age of residents: Minimum age 55+

The profile is changing significantly. Our 55 + residents are generally still working. This has a negative impact on our ability to build communities within the schemes. Those attending coffee mornings are generally older. Only a small portion of our residents choose to be actively involved in building communities in the schemes they live. The general opinion amongst residents is that they want their housing provider to organise activities/coffee mornings and fund it. It's only when we have an active resident/s living in a scheme that community engagement is enriched. We are seeing a shift in resident engagement. With many not wishing to engage at all.

Service Description: Scheme Based

HA services provide a housing officer role with speciality in supporting residents to live independently within their home. We also provide a holistic approach to supporting our residents through working closely with third party professionals to implement support, sign posting and accessing services to the individual needs. An element of our role focuses on compliance, neighbourhood and estate management as well as advocacy, and supporting residents with maintaining their home and tenancy. At Soha, we have many specialised teams who we can refer our residents to with bespoke support in the area they need.

Housing Stock for older people

Property Type	Number of units
Bedsit	0
1 bed	105
2 bed	105
1 bed bungalow	210
2 bed bungalow	150
Total	570

Managing the quality of the service:

Residents are invited to take part in TSM's as well as 'ad hoc' feedback such as a repair feedback exercise. We all have a responsibility to check the TSM portal, and action any dissatisfied comments promptly.

We are erosh accredited (Independent Living Standards) and like to keep this accreditation valid and up to date. We act on any recommendations given from our reviews. As a wider organisation we have strong values around 'resident first' despite the organisation growing rapidly, the ethos and mindset continues to be strong. In our Extra Care Schemes, the on-site care team are governed by CQC but this has no impact on the services Soha provide. The two services are separate but work collaboratively.

Allocations:

We have a mixture. Our Independent living bungalows and flats are let through Choice Based Lettings page. Our Extra Care applications can be taken directly. We work with two local council to evaluate every application on its own merit. If an application is refused, we need to be able to demonstrate our reasons for declining.

Assessing New Tenants:

HA letting team will assess any new tenants. Nominations will be sent from the Lettings officer to the IL officer to carry out a viewing and sign up if the applicant accepts the property.

Upgrading Programme

We have a few older schemes which are currently being evaluated for retrofit. We have in recent years redeveloped sites and re-building new on its footprint.

Management Charges: n/a

Service Charge Caps:

We have discontinued our monitoring service (OK each Day) to residents living in bungalows and Independent living Schemes. Following a survey carried out with our residents on their feedback about the service the results clearly evidenced that it was not suitable for everyone. With a high proportion commenting on requiring choice as well as the negative impact the cost of living if effecting residents. The service was supportive to a small group of people but not everyone. We decided to implement a person-centred approach by providing choice rather than compulsory. Following the survey, results revealed that residents receiving benefits were happy with the service, but for those who self-funded were disproportionately disadvantaged due to the cost of the service, whether it was useful for them or not. Soha took the decision not to renew the contract. Instead, offering residents the opportunity to peruse the market for pendant alarms or devices that meet the individual needs and budget. IL housing officers have since made many referrals to Age UK and Oxfordshire County Council for a dispersed pendant alarm. The offboarding process was clearly explained to our residents through hard copy letters, face to face conversations during coffee mornings as well as a mention on our plasma screens in each IL Scheme.

Staffing:

The IL team currently has three housing officers working across five localities. They each have specific schemes to manage. Each scheme is visited once a week in the morning. The IL officer will work at the scheme, carrying out fire safety and compliance checks as well as welfare checks to our vulnerable residents. Residents have the opportunity to come and see their IL officer whilst they are visiting the scheme, but if a specific time or day is required then we will be flexible and book an appointment for a home visit with them. The IL officers carry out admin tasks in the afternoons or book home visits to do an Independent Living Review with the resident. Our Extra Care managers work slightly different. They are based at the scheme for the duration of the working day; and operate an 'open door' policy for residents to be bale to the office during the day. Extra care Managers will facilitate and support activities at their schemes as well as carrying out housing manager responsibilities; these include bot not limited to estate checks and managing neighbourhoods' disputes. IL officers will work with

their locality teams to support and facilitate community activities. Being involved with community projects is rewarding for all involved. This is an opportunity to learn new skills and work with colleagues they normally wouldn't work with, so team building and creating new opportunities.

Staff Recruitment and Retention:

HA has an excellent record of low staff turnover; however, recruitment can be challenging. This isn't specific to IL, it's across services generally. The IL role has evolved so much that there is a requirement for many skills to do the job now. With many stating salaries don't reflect the responsibility anymore.

Supporting People funding:

No but Intensive Housing Management funds can still be accessed, but this isn't directly for IL services. This funding is accessed for the letting service and they manage the budget directly.

Challenging Behaviour/ASB:

Over recent years ASB and challenging or unwanted behaviour has increased over the years. We believe there is a shift in mentality towards HA's and its staff. Soha has reviewed its ASB policy recently that now have strict guidelines for us to follow in addressing unacceptable behaviour and keeping our staff safe.

Cleaning:

We use contractors at all of our schemes.

Heating:

Most of our homes have efficient heating systems but where an upgrade is required this will be identified at the yearly gas safety home check. We have a Retrofit program currently being rolled out for properties with an EPC rating C or below. There have been publications to encourage residents to consider a heat pump, but the take up on this is poor.

Community alarm monitoring: Tunstall and Progress Lifeline

Alarm Equipment/Digital Switchover:

Our Digital Transformation team are currently working on digital switchover projects with various third-party contractors. Currently they are gathering quotes from various contractors to provide the switchover infrastructure.

We would like to move away from hard-wired alarm equipment, but digital switchover is a pressing issue that requires addressing first. I believe moving to a wireless monitoring service will be so much easier once we have gone digital.

Grounds Maintenance:

We have a grounds maintenance contractor to carry out all of our grounds maintenance works on all of our communal grounds. The organisation is looking into 'in house' options

for the future. With the belief that standards will improve greatly if employed directly by the organisation rather through a contractor.

Resident Involvement:

Residents are included with any HA decision making. As a 'Mutual' organisation, resident participation in decision making is very important to us. We hold consultations for policy change ideas and feedback that have a direct impact on our residents. We invite residents to a coffee morning as well as carrying out a survey for our harder to reach residents. We are not governed by NHF but we pride our resident involvement on the values it demonstrates.

Scheme Activities:

We utilize Age UK for many of our activities, as well as an 'in house' trained seated exercise tutor to holds classes at our Extra care schemes every week. We strongly support residents to hold their own activities such as Bingo or Dominos empowering them to enrich their own community. We hold regular celebrations on national days such as Armistice Day or Royal celebrations, also arranging annual scheme birthdays for each of our Extra Care Schemes.

Pets Policy:

We have recently reviewed our Pet Policy. We take an empathetic approach and allow most pets to move in with the resident at our IL schemes where possible; however, we discourage pet ownership other than ground floor for access purposes. This applied to both IL and extra Care settings. Occasionally we will allow a house cat on an upper floor, but the pet must not be replaced if it is rehomed or dies. Our pet policy is clearly explained at sign up and the resident fully understands their responsibility with an emphasis that if rules are broken then permission could be revoked.

Infestations:

Yes, we are experiencing more infestation cases across the board not just in our IL or extra Care settings; However, cases are more common in our general needs properties. The cost of treatment and effective management is extremely challenging for the organisation

Decarbonisation and Net Zero:

HA have recently completed building its first Carbon Zero general needs block of apartments on the outskirts of Oxford City. We haven't any plans to build another Carbon Zero development at this time. Our latest new build site was an Extra Care Scheme (opened 2023) which is the biggest scheme that HA have. We don't plan to build any more at this time and isn't forecast. We have some older IL schemes, which are in need of redevelopment. Local authority require general needs homes, and HA is focussing on this, not the implementation of building new or redeveloping IL schemes at this time.

Communal Lounges:

Our communal areas in our Extra Care Schemes are not open to the public. This is due to s106 agreements. We do however have a few small groups in the community that use our communal facilities but this is strictly prior agreement with residents.

Guest Bedrooms:

Our charges differ in price according to guest room size and facilities. We generally charge £15 a night in our Extra Care Schemes but our fully furnished guest room at our most recent Extra Care building is £25 per night. This has a basic kitchen, TV, large level access shower room and Wi fi.

White Goods:

Only shared ownership properties are provided with white goods as standard, but these are 'gifted' upon sale, and the resident takes ownership and responsibility of them thereafter. We occasionally transfer Shared ownership stock to affordable rent in cases where properties are not sold. In these cases, we will repair white goods but will not replace.

Mobility Vehicles:

HA have a scooter policy that is currently under review. Our policy states scooters in Extra Care buildings can only be parked in the scooter store which is a purpose-built area. Access to the scooter store does not impose on internal communal areas, hence removing the hazard of scooters being used in corridors. Where there isn't a purpose-built scooter store, the scooter must be stored and charged within the resident's flat. Scooters found to be stored in communal areas will be ticketed by our estates team and removed after 7 days. Items that have been removed are stored with HA for collection and a handling fee is applied upon collection. This is managed by the Estates team. The independent Living team work with residents in supporting them to comply with the policy.

Appendix 17 – HA in England

Housing Association in England

Age of residents:

Our Independent Living Team provide secure and accessible social housing for people over the age of 55, or 50 with a long-term health condition, who have a housing need and meet our eligibility criteria.

We aim to meet a variety of needs through a range of options, including:

Sheltered

Over 55s apartments and bungalows

Extra care

Service Description: Scheme Based

We have 'Here to help service standards' that set the scene for our service offer.

Housing Stock for older people

Property Type	Number of units
Bedsit	0
1 bed	3950
2 bed	1925
1 bed bungalow	0
2 bed bungalow	0
Total	5, 875

Managing the quality of the service:

We have a quality assurance framework which governs our service offer and delivery of services. This is in line with the consumer standards and EROSH ILS accreditation standards. We undertake audits across the service looking at areas of compliance and reviewing the quality of the services delivered.

We have a Quality Performance Manager role and a Team Manager role which has oversight of all performance data, the quality framework and oversees / tracks all projects for Independent Living.

Allocations:

CBL and Expression of Interest direct let

We often receive nominations with potential applicants with high complex needs. The client group is changing who need the sheltered accommodation as our population are living longer and living longer with complex needs. We plan to review our letting agreement with each LA to identify if we can renegotiate the terms to be more in the favour of us as a landlord and be able to move on to our own EOI so we can get properties let.

Assessing New Tenants:

This is under review. We will have more involvement with the lettings process. We will have a mini assessment for IL which will take place ahead of viewing being offered. This will be in line with our service offer 'Here to Help'. We will make sure all residents moving in will have a 4-week post tenancy sign up visit by a Scheme Housing Officer to review any areas of help needed i.e. benefits in place, change of addresses complete, any repairs which they have identified, clarity on our service, expectations etc

Upgrading/Reviewing Programme

Options appraisal work is planned for the stock, we have been undertaking this in a piece meal approach to date, where buildings are in requirement of planned building safety works or having high level of repairs and dissatisfaction, we have undertaken an optional appraisal and presenting findings to board to either redevelop, retain or dispose. Over the past 3 years and to date we have had 4 locations subject to this process 3 in Sussex (Tower Blocks/ lack of demand location) and 1 in London (old townhouse not fit for purpose).

Rents and Service Charges

Average Rent	Average Service Charge	Region / Type
£189.32	£89.48	Kent
£136.48	£45.36	Sussex
£149.00	£48.21	Midlands
£255.54	£97.05	London
£156.28	£46.13	BISH (Berkshire, Surrey, IOW & Hampshire)
£246.01	£100.83	Extracare (Sussex, Kent & London)

Management Charges:

We have a flat management charge across our service

Service Charge Caps: n/a

Staffing:

Role	Hours	Front Line / Management	Comments
Scheme Housing Officers	Part time and Full time	Front Line staffing Static to schemes Most have dedicated staff or cover 2 schemes We have 122 staff across our 141 schemes	Scale on hours on scheme but on average if a 40+ unit scheme would have a full time 35 hour position All services offered are in the Here to Help service offer
Team Managers	Part time and Full time	Management of SHO's	Line management of front line teams

		Area of schemes responsible for between 4-9 schemes each	Buddy arrangements with another TM Support with project work across IL
Head of Independent Living	Full time	Management of the TM's Strategic planning and associated work Responsible for Quality and Performance across the service	

We sign post to all support services which can be internal across our organisation and also external to the business.

Our SHO's do not provide support but do provide sign posting when support is required.

Additional support - We can refer internally to Asb, safeguarding, resettlement, financial inclusion, social impact, resident involvement, adaptations, tenancy sustainment to name a few. We often signpost residents to health & social care direct, occupational therapy, crisis team, advocacy services, age UK, befriending services, voluntary organisations, training providers, fire service, charities for support with purchasing household items. We also have a community partnership team who are responsible for the delivery of local action plans for community partnership activities, so many schemes are involved in community and scheme projects, this can be befriending, art classes, exercise classes, cookery classes, first aid, and food safety courses, craft classes, digital inclusion, lunch clubs and much more

The review of staffing hours and ratio to scheme size of units will be undertaken to ensure we have a fair disparity of staffing levels across the national service. This links into the review of the cost of the service and ensuring we are providing a value for money service to all residents.

Staff Recruitment and Retention:

Recruitment has been a challenge in terms of not having the people with sector knowledge or skill. We do have a high number of applicants, but the quality is not as high as it has been historically. I do think the whole job market has changed this is not just in housing. We recruit based on values and transferable skills which has positive outputs.

Supporting People funding: No

Our service is designed as Intensive Housing Management however we are not accessing enhanced funds we access standard Housing Benefit and Service charges or self-funders.

Challenging Behaviour/ASB:

ASB is increasing across our business and in Independent Living. This is due to a change in the client group and our residents living longer. There is a large link with the change of demographic who need to access our accommodation who have higher complex needs linked with – mental health, substance misuse, complex health needs and former homelessness.

The impact on residents across the scheme is causing high dissatisfaction due to residents not being clear on what action can be taken and how long the timeline is for a case to be progressed and court action to be able to take place.

We need to be better at educating our residents.

The other impact is having a wide range of age demographic across a scheme which can span 4 decades who all have differing lifestyles and expectations.

Cleaning:

We have both set ups across our schemes.

Our vision is to move all cleaning to in house DLO approach which is underway.

We do see higher levels of satisfaction with in house DLO cleaning services.

They vary in terms of hours per scheme; this is something we are keen to review with our Estates teams as the cleaning services are managed and overseen by our Estates services teams at HA not Independent Living.

Heating:

We have various types of heating across our schemes – majority are storage heaters, and most are going through upgrades. More detail in the Net Zero answer.

Community alarm monitoring: Appello

Alarm Equipment/Digital Switchover:

We have a contract manager who is looking at access systems for HA. They have been given a programme to upgrade/digitise the majority of XT & some Tunstall warden call systems to an XT2 warden call system, which is digitally compatible and is an open protocol system, therefore HA isn't tied to a certain provider or ARC (alarm receiving centre). This is due to be completed by end of 2027. Most works are to make the current system able to be digital by adding a digital bridge. We need to review the longer-term plan for upgrades which will feature under our stock options appraisal.

5-year contract with Appello for the call monitoring started from April 2025

Grounds Maintenance:

We have a dual approach. The vision is to have a fully DLO service for all Estates services across the portfolio. This is managed by our Estates and Repairs directorate.

Resident Involvement:

We have a strong resident involvement approach across our IL Service. This is a key area of focus for the whole of the business where we have Resident Regional Panels which scrutinises performance and helps shapes services. We replicate this in Independent Living with our Resident Steering Groups which are regionally run. These groups helped us design our revised service offer and hold us to account for our performance across the service. We

see these steering groups as an extension of our team to help us improve and deliver outstanding services.

Scheme Activities:

Most Schemes offer a wide range of activities, with residents encouraged to take the lead wherever possible. The team, particularly Scheme Housing Officers (SHOs) play an active role in facilitating these activities and motivating residents to get involved.

SHOs also collaborate with local communities and groups, enabling residents to take part in events both on-Scheme and within the wider community. In addition, our Places and Community team develops and delivers engagement strategies across regions, working with partners, councillors, and the voluntary sector. This supports our Local Link model and ensures a diverse range of services and activities are available to residents.

We have an engagement framework for our engagement with residents and staff. See insert from our Engagement Framework for residents:

Independent Living Engagement & Tasks Framework
Residents
2025/2026

Daily & Weekly	
Scheme Housing Officer to be on scheme daily (scheme arrangement specific)	<u>Evidence - Yes</u> Office Door Posters SharePoint
Calls to residents (welfare) (list based on people who opt in and out of this service)	<u>Evidence - Yes</u> Resident Contact Form SharePoint
SHO to review & action any items on Customer Dynamics	Evidence - No This is reviewed by weekly CD performance actions list per Team Manager
SHO to review and action any items on SBR Appello 1. Check any incidents from overnight 2. Updating resident information 3. Updates to scheme information to ensure is current	Evidence - No This is reviewed by monthly usage report by Team Managers
Compliance checks – Flushing, Fire Alarm Testing, H&S checks & inspections, laundry room checks	<u>Evidence - Yes</u> CD, Aaron and Zeta App
Risk Hub review for any up & coming FRA's – adding notes to system	<u>Evidence - Yes</u> Risk Hub
Monthly	
Coffee Mornings/Afternoons – Chaired by SHO	<u>Evidence - Yes</u> Notes of meeting SharePoint Notice board on scheme
Monthly review of PEEPS/PCFRA/RIFs by SHO	<u>Evidence - Yes</u> Customer Dynamics, and/or SBR
New Resident Move in – 4 week check	<u>Evidence - Yes</u> Customer Dynamics
Check Rent Accounts & Arrears over £1k	<u>Evidence - Yes</u> Customer Dynamics & Arrears Reporting sheet
Activities – SHO to lead/host one activities per month	<u>Evidence - Yes</u> SharePoint
SHO – Self Assessment Scheme Audit to Team Manager	<u>Evidence - Yes</u> SharePoint
1/4ly	
Scheme Resident Meetings (minimum 1/4ly if residents wish to be more frequent this will be accommodated) Team Manager 2 of the 4 meetings at each scheme (in a 12 month period) and hold a 45min drop in session where they can offer a 121 with a resident to discuss	<u>Evidence - Yes</u> Notes of Meeting Notes of Drop in session SharePoint

resident specific issues (opportunity for escalation where needed)	
<p><u>Steering Group</u></p> <p>Chaired by HOIL and supported by TM's and SHO's</p> <p>Region Specifics</p> <p>North</p> <p>London – 1 x face to face per year – 2 x MS Teams session per year</p> <p>Midlands – 3 x face to face per year</p> <p>South 1</p> <p>Kent – TBC</p> <p>Sussex – TBC</p> <p>ExtraCare – TBC</p> <p>South 2</p> <p>BISH – Being held 1/4ly at the end of each scheme resident meeting</p>	<p><u>Evidence - Yes</u></p> <p>Steering Group</p> <p>SharePoint page</p> <p>Notes & Presentation</p>
Head of Independent Living to attend schemes This will be a planned visit	<p><u>Evidence - Yes</u></p> <p>Recorded on sheet in SharePoint</p>
Estate Inspections – residents are invited to participate in these inspections	<p><u>Evidence - Yes</u></p> <p>Record on Customer Dynamics and SharePoint</p>
<p>Newsletter</p> <p>SHO to deliver/email to all residents at each scheme (can be monthly if requested by the residents) (not to be the same month as the Resident Meeting)</p>	<p><u>Evidence - Yes</u></p> <p>Notice Board on scheme</p> <p>SharePoint</p>
6 monthly	
<p>Resident Meeting with outside Agencies</p> <p>2 meetings per year</p> <p>Resident to work with SHO on who is best to invite</p> <ul style="list-style-type: none"> • Examples – Police, Fire & Rescue, Age UK, Local Groups, Wiltshire Farm Foods etc 	<p><u>Evidence - Yes</u></p> <p>SharePoint</p>
<p>Scheme Audit – Team Manager Quality Audit</p> <p>Every scheme every 6 months</p> <p>All items on Engagement Plan</p> <p>Entrance Foyer/lobby</p> <p>Notice Board Review</p> <p>Fire Exits clear</p> <p>Communal Spaces</p> <p>Guest Room (if applicable)</p> <p>Estate Walk around</p> <p>Cleaning</p> <p>Etc</p>	<p><u>Evidence - Yes</u></p> <p>SharePoint</p>

Annually	
Annual Resident Visit	<p><u>Evidence - Yes</u></p> <p>Aaron & Customer Dynamics</p>
Pull cord Checks in resident properties	<p><u>Evidence - Yes</u></p> <p>Aaron & Customer Dynamics</p>
Service Charge Meeting (start of year or year end)	<p><u>Evidence - Yes</u></p> <p>SharePoint</p>
As & When throughout the year	
<p>Posters</p> <p>Letters</p> <p>Notice Boards</p> <p>Community Investment to support with activities</p> <p>Ad hoc social events and fundraisers</p> <p>Resident Engagement meetings when major works planned</p> <p>Consultations with residents on scheme works</p>	<p><u>Evidence - Yes</u></p> <p>SharePoint</p>

Pets Policy:

We have a companywide Pet Policy where a resident needs to request to house a pet and sign up to a pet agreement.

Infestations:

We do have active bed bug cases across the portfolio. We advise residents on best ways to address the issue, but if there is a risk of cross contamination in regard to bed bugs we will foot the cost for treatment to reduce the risk. This is under review in a policy review and maybe subject to change.

Decarbonisation and Net Zero:

We are stepping up efforts to tackle climate change through retrofitting homes, decarbonising heat networks, and reducing emissions across offices and supply chains.

We're taking actions to combat climate change by setting a target to reach net zero carbon emissions by 2050. With housing responsible for 14% of the UK's total emissions—and 98% of our own emissions stemming from existing homes—our organisation is focusing on improving energy efficiency and sustainability across all areas of our operations, as outlined in our Environmental Sustainability Strategy 2023-26.

Our approach is multi-faceted, with a strong focus on retrofitting our homes to improve energy efficiency. We've made great strides, securing funding from multiple avenues such as the Social Housing Decarbonisation Fund, ECO, CAN and SHINE. A key part of our strategy is the 'fabric first' approach, improving insulation and other measures before introducing renewable technologies like solar panels. Our retrofit roadmap will guide us in bringing our existing homes to net zero by 2050.

Beyond our homes, we're working to lower emissions from our offices, aiming to achieve an EPC C rating by 2027 and EPC B by 2030, to assist with this we're carrying out office audits which capture elements such as energy usage, water, waste and responsibly sourced materials. Following these audits and staff surveys, we'll implement bespoke recommendations for each of our main offices.

Communal Lounges:

We provide communal lounges that serve as welcoming spaces for both residents and members of the local community. To ensure safety and organisation, visitors are asked to complete a sign-in form, which is overseen by Scheme staff.

In many Schemes, these lounges are also made available for hire by external groups such as the MS Society, U3A groups, and local charities. This not only supports community engagement but also encourages our residents to take part in a wide range of activities and events held on-site.

Clear guidelines are in place to ensure that all communal spaces are used appropriately and remain enjoyable for everyone.

Guest Bedrooms:

Many Schemes offer guest rooms, each with different features. Some include ensuite facilities, while others provide kitchens or alternative layouts. A small charge applies for the use of these rooms, and any income generated is used to offset residents' service charges within the Scheme.

We will be conducting a review of charges across all guest rooms and introducing a standardised pricing structure to ensure consistency as they currently range from £10 - £50 per night.

White Goods:

We do not provide white goods directly to residents. However, for those experiencing hardship, we can offer support through our 'Helping Hands' budget and by working with a range of charitable organisations across each region. While this assistance helps residents access essential items, responsibility for any future replacements remains with the resident.

Mobility Vehicles:

Several Schemes provide dedicated storerooms for mobility scooters, and in many cases additional storage space has been created where possible. However, some Schemes are unable to offer this facility due to limitations in size and available space.

The policy on scooter storage is currently under review. Discussions are taking place around the potential introduction of charges for storage space and electricity use, though no decision has yet been made. As storage of mobility scooters can present challenges, the updated policy will ensure a clear and consistent process is in place.

All new residents will receive a welcome pack 'Living Here Guide' and the revised policy will be included as part of this information

Appendix 18 – LA in England

Local Authority in Southern England

Age of residents:

Minimum age 60 or younger with disabilities which render the application suitable for supported accommodation

We are seeing younger and more active residents moving in, some are still working

Service Description: Scheme Based

The purpose of LA Retirement Living is to provide residents with housing that includes on-site housing support, to enable them to live independently and in their own home for as long as possible.

In all LA owned and managed retirement living properties there is a 24-hour Lifeline link and a secure door entry system, as well as a court management service. The Court Manager is able to provide non-personal care and housing-related support. Residents requiring personal care or domestic support will need to either pay for this themselves, receive such assistance from family/friends, or be assessed by LA Adult Social Care for eligibility for assistance.

Applicants with care needs beyond the ability to be safely accommodated, or who exceed 14/15 hours of care per week, will be referred to LA for assessment for extra care housing or alternative appropriate housing

Housing Stock for older people

Property Type	Number of units
Bedsit	0
1 bed	455
2 bed	0
1 bed bungalow	34
2 bed bungalow	17
Total	506

Managing the quality of the service:

Retirement Living Coordinator responsible for monitoring health and safety compliance within buildings. Tenant Participation team responsible for obtaining and collating feedback from surveys. Retirement Living Team Leader responsible for staff development and performance management

Monitored through resident involvement, resident surveys, attendance at coffee mornings, staff 121s and appraisals, EROSH accreditation annually

Erosch Independent Living Standards accredited

Allocations:

Allocated via CBL. Some variable lack of demand, usually overcome by advertising outside of LA area. Piece of work currently being done to identify those in the community suitable for retirement living and contact made. Some unsuitable nominations occasionally – all nominations approved by Team Leader, so additional queries made at this stage to ascertain suitability.

Assessing New Tenants:

If applicants come via the Homelessness route, they have a Housing Options interview which partially assesses their suitability for retirement living. Overall assessment and that for those on the Housing Register lies with the Team Leader. Once moved in residents receive a Wellbeing Assessment which focuses on areas of support, such as financial, physical, emotional, social wellbeing and appropriate referrals / signposting as a result. These assessments are planned to happen annually but currently residents can opt out of these. This is being reviewed as well as the form structure to capture more data

Rents and Service Charges

Not available

Management Charges: n/a

Service Charge Caps: no

Staffing:

Dedicated Scheme Managers for each Court (9 across 11 buildings as 4 Courts share 2 scheme managers), available 8-4, Monday to Friday with 4 days on site. Daily calls, wellbeing assessments, liaising with family / medical professionals / relevant other third parties, carrying out compliance H&S duties, reporting and managing repairs, conducting sign-ups and supporting with end of tenancies, dealing with emergencies, supporting Residents Associations where relevant and facilitating activities

Retirement Living Co-Ordinator – support and monitoring role. Supports the managers to carry out their roles effectively. Provides practical support when needed, ensures all managers have the equipment and resources they need to function in their job role. Provides emotional support in times of crisis or emergency. Attends resident meetings and coffee mornings with, or in place of, the Team Leader and deals with enquiries and some complaints. Conducts bi-monthly H&S 121s in Courts where compliance paperwork is checked and a walk about carried out to identify any H&S concerns and rectify accordingly. Provides low level equipment to Courts such as lampshades, bathroom blinds, cushions, guest room bedding etc etc, keeps all financial records relating to RL. Assists with out of hours emergencies

Retirement Living Team Leader – monitoring, support and development role. Supports the managers and the RLC in their job roles. Oversees upgrades and developments within the Courts and the service. Assists with procurement of contractors and assists in management of lifeline and Tunstall contract. Develops staff and sets appraisal, 121 and Team targets. Liaises with Resident Associations through regular meetings, recruits new staff and carries

out probationary appraisals. Provides advice to managers on an ad hoc basis and supports in times of crisis or emergency. Attends out of hours emergencies, if necessary, overall strategic responsibility for team and service development in line with Council objectives

Additional support - Adult Social Care, LA Floating Support, Debt support, substance misuse, benefits assessment (in house), Occupational Therapy (in house).

Staff Recruitment and Retention:

Historically there were challenges, we had issues recruiting staff of a suitable quality due to salary level. The Council carried out a role review 18 months ago which found in favour of the job role. We also introduced a salary progression scheme linked to professional housing training which adds a further incentive to staff. There is an Out of Hours Payment scheme in place to recompense staff attending emergencies out of normal working hours.

Supporting People funding:

No SP funding or Intensive Housing Management.

Challenging Behaviour/ASB:

We have seen some increase. It is quite minor in retirement living but there are a number of tenants who can display challenging behaviours, more challenging than ASB really. This can become quite time consuming for all staff involved with that Court and can create a divide between some resident groups. These issues are usually fairly easily resolved within the Team but we do have access to an ASB officer and the Housing Officer for support.

Cleaning:

Contractors. They are not contracted to any set hours but assessed on the level of cleanliness and resident satisfaction.

Heating:

Gas heating

Community alarm monitoring: Careium

Alarm Equipment/Digital Switchover:

Currently looking at Pre Digital Phone Lines with BT as IP switch converter from Tunstall not forthcoming. This will protect our systems until 2030 during which time we can plan in a full digital upgrade

Tunstall – plans to upgrade over several years to fully digital system

Grounds Maintenance:

Contractors

Resident Involvement:

Resident Associations in some Courts, other being encouraged to form them. These mean regular resident meetings with staff attendance and multiple activities for residents. Some

Court walkabouts with staff and contract managers as well. Tenant Board in place for consultation on policy change / developments. Overarching RA meetings in place with Management staff on a quarterly basis.

Scheme Activities:

Varies in Courts. Where there are Resident Associations in Courts they are responsible for facilitating activities the residents would like, with Managers support and some Courts are very vibrant with theatre trips, fish and chip evenings, weekend breakfasts, and variable sport activities and quizzes all taking place. Where there are no RAs in place, Managers are carrying out activities such as bingo / coffee mornings to ensure residents can socialise but be covered by LA's public liability insurance. Some Courts may have visiting providers for activities such as armchair aerobics but these are less common.

Pets Policy:

Pets are accepted by prior permission in ground floor properties only. To be kept on lead in communal areas and not in communal lounges for any elongated period. No real issues, occasional problems with a dog being in the lounge perhaps.

Infestations:

Occasional flea infestations, we call contractors and paid for by repairs budget

Decarbonisation and Net Zero:

Boiler replacements being looked at. All Courts have solar panels to reduce charges to residents

Communal Lounges:

Occasional disputes where certain residents want to use the lounge for karaoke for example and others don't. Written guidelines in place for usage where no RA is in place, hence no insurance to cover activities. Outside groups can hire the lounges but we don't have any coming in, there are acceptable use guidelines for these occasions. Residents may wish to use the lounge for an even such as a birthday etc, acceptable use guidelines in place for those as well.

Guest Bedrooms:

Currently £15 per night with one Court at £20. Income is used to offset the service charge

White Goods:

Only in communal kitchens, we would replace when necessary

Mobility Vehicles:

Currently £25 per year – this will be reviewed next year. Courts operate a waiting list and we don't decide who has more need than others for this. No mobility scooters in communal areas, storage is provided external to the building

Appendix 19 – Almshouse in England

The Almshouse is a Registered Social Landlord in South West England

Age of residents: Minimum age N/A with an average age of 76 years

We have an aging population of residents; the average age has increased over the last few years to 76.5 years. The oldest resident is 97 and the youngest is 51 - our constitution doesn't have a specific minimum age to qualify

Service Description:

The provision of housing for persons who are in need, hardship or distress who are resident in the Area of Benefit

Such charitable purpose beneficial to the Beneficiaries or a sufficient section of them as the charity trustees decide

"Area of Benefit" means the City and the surrounding area.

"Beneficiaries" means people who have a housing need or are in other hardship or distress, who live, have lived or are in urgent need of living in the Area of Benefit or have a strong family or social connection with it, with preference for those who have lived in the Area of Benefit for a period of at least three years.

Housing Stock for older people

Property Type	Number of units
Bedsit	0
1 bed	33
Total	33

Managing the quality of the service:

Almshouse is managed by 13 Trustees who are personally responsible for the Trust and its activities. It is a registered provider regulated by the Social Housing Regulator and registered with the Charity Commission. We are also a member of the Almshouse Association, which is a trade body specifically for almshouses and provides advice, support and training for its members.

The Chief Executive is responsible monitoring and quality assurance.

Allocations:

Almshouse holds a waiting list of applicants and in practice it is the staff who determine which of the applicants on the waiting list has the highest priority, based on the Trust's qualifying criteria (above) for beneficiaries. The CE and Scheme Manager meet to discuss applicants on the waiting list, to determine initially whether they will even qualify for an almshouse and then, when a vacancy arises, which qualifying applicant has the highest

priority at that point. The latter is determined by the urgency of their housing need (e.g. are they threatened with homelessness) and the length of time that they have been on the waiting list. Therefore, we don't have unsuitable nominations as such, but often people apply who do not qualify for an almshouse. We have 11 people on the waiting list at the moment and there is no problem with a lack of demand currently.

Assessing New Tenants:

See above. Home visits are also undertaken, pre-offer. No current challenges

Rents and Service Charges

	Per Week	Per Month
Housing	£102.87	£445.70
Water	£5.74	£24.87
Service Charges	£46.53	£201.63

Management Charges:

The monthly maintenance contributions (MMCs) above include staffing costs to run the almshouses.

Service Charge Caps: n/a

Staffing:

There are 4 staff members - Chief Executive, Scheme Manager, Finance Officer and Handyman. All are P/T. Two staff members are directly involved in the management of the service - the Scheme Manager who works 23 hours pw, and the Handyman, 15 hours pw.

Staff Recruitment and Retention: n/a

Supporting People funding:

n/a

Challenging Behaviour/ASB:

no

Cleaning:

Contractors - communal areas only

Heating:

Not included

Community alarm monitoring: PPP Taking Care

Alarm Equipment/Digital Switchover:

Switchover to digital completed on all 33 homes

Everon (alarm call systems) and Diack (smoke alarms) All were recently installed as part of digital switchover

Grounds Maintenance:

Residents, a gardener and volunteers undertake all gardening work

Resident Involvement:

Two of our board trustees are residents (almost unheard of in almshouses) and we have quarterly residents' meetings for sharing information and getting feedback on services and repairs etc. National Housing Federation's Together with Tenants standard - not applicable as our residents aren't tenants - they are licencees.

Scheme Activities:

Some social events e.g. lunches, day trips, talks, Chapel services as well as open days throughout the year

Pets Policy:

No pets due to communal gardens, but assistance animals would be allowed

Infestations:

None.

Decarbonisation and Net Zero:

As all of our properties are grade 2/2* listed (many are over 600 years old), EPCs and Net Zero is difficult if not impossible to apply

Communal Lounges:

We have a Guild Room which may be used by residents and their families for parties, meetings etc. and we have recently adopted guidelines for its use.

Guest Bedrooms:

£7.50 per night - Charity's bank account

White Goods:

Yes - we supply and replace as necessary

Mobility Vehicles:

A small number of residents have mobility scooters and they can charge these outside on a daily basis using the Landlord's supply of electricity. We've recently added two more charging points (same basis) and a new shelter for scooters.

Appendix 20 – LA in England

Local Authority in Southern England

Age of residents:

55+ we have younger residents moving in, a few of whom are still working.

Service Description: Scheme Based

The 8 Independent Living schemes are served by a team of Independent Living Officers who cover the 8 schemes. Each of the ILO have 2 schemes to attend to with one staff member who is a 'floating' person to cover sick absences or leave. They rotate around the service on a 6-week basis.

Out-of-hour incidents are covered by Forest Care, our 24/7 provider. Forest Care have details of all our customers and so can interact when a pendant/pullcord is activated. They can call emergency services in the event of an emergency.

In the past each of the Independent Living Officers had objectives that were around a specific area i.e.: activities, improving relations with adult social care, fire Safety this allowed the team to get more in-depth knowledge. Following this there are some members of the team who are working towards a specialism so that they can share their knowledge with the team. For example, current specialisms are, hoarding and ASB. The team provide welfare checks to each of the customers in the schemes. They can signpost customers to services that are not provided by the team – e.g. OTs, Social workers, GP's.

The extra care service is an accommodation-based service providing an on-site care service to assist with independent living. To qualify for a property at the scheme, there needs to be a requirement for care. There are care staff on site 24/7 for emergencies. The maximum care calls are 4 per day, encompassing a wake up/breakfast call, a lunch call to assist to get residents to the on-site canteen, a tea call to help prepare a light snack and a bedtime call to assist to bed. They also help with prompts for medication. If there are residents in an Independent Living scheme whose health deteriorates and there is a care need, they are signposted to Fosters and, if interested, supported complete a housing application transfer form.

Housing Stock for older people

Property Type	Number of units
Bedsit	20
1 bed	193
2 bed	1
1 bed bungalow	49
2 bed bungalow	10
3 bed bungalow	1
Total	274

Managing the quality of the service:

Good quality staff who are well trained and who understand the role. Regular team meetings and 121 conversations ensure that best practice is shared across the team and policy, and procedures are followed. Being part of EROSH has helped to improve standards

by ensuring that we look closely at what we do and how to improve. A tenant satisfaction survey is undertaken on a yearly basis.

We have a compliance team who regularly audit records that are kept by scheme staff. Erosh Independent Living Standards accredited. We have been accredited by EROSH since 2021, recently passing reaccreditation in 2024.

Allocations:

Properties are allocated from a waiting list that is banded in order of priority. We have a panel meeting for the extra care nominations which includes input from allocations team. Adult social care, Optalis and the extra care scheme staff. We have experienced some unsuitable applicants, however, now we do look at suitability of applicants, especially where it might impact on other residents or staff. This allows us to have a good balance of residents in the schemes. There is an issue with falling demand both for independent living and for extra care services – there is due to be a push to advertise for more applicants.

Assessing New Tenants:

Applicants for extra care go through a panel meeting with allocations and adult social care to ensure that the placements are suitable. The Housing Applications have been reviewed and require more in-depth information about ASB, support and vulnerabilities. The Independent living schemes have nominations reviewed by the Housing Manager.

Management Charges: n/a

Service Charge Caps:

We capped service charge increases on average by 11%. Two years ago, we identified we were significantly undercharging residents service charges based on our costs. We are currently in year 2 out of 3 in implemented a phased approach to bring them in line with actual costs. If we hadn't capped the increases would have been much higher

Staffing:

We have 8 Independent living schemes and 1 extra care scheme. We have 5 staff to cover the 8 schemes so 4 of the staff each cover 2 schemes per day. The other team member is floating so can be deployed where most needed. The extra care scheme has one dedicated member of staff. The ILO staff cover 9 am to 5 pm and the extra care scheme manager works 7:30 am to 4 pm. The ILO staff tend to spend the morning on the first scheme and the afternoon on the second scheme. There is a housing manager who manages all the team. The role of the staff is to check the I'm Ok buttons are pushed and any that have not been pushed they will try to contact the resident through phone, intercom, door knocking or contacting NOK. If they cannot contact the residents by the end of the day, it will be escalated. The floating officer helps with support plans and emergencies as well as cover in the event of absence. Officers help to raise repairs and chase outstanding repairs, carry out safeguarding referrals and work with other services to ensure the residents have the support they require. They also deal with ASB and hoarding concerns. They also signpost residents to other organisations, such as befriending organisations.

Other support - There are a number of befriending organisations who can also give support with shopping and hospital transport.

Staff Recruitment and Retention:

Since the establishment of the independent living officers permanent roles, we still have the same team in place. Retention has been good, and this has helped to ensure that the role works well for residents. The team have clarity on the role and understand what is required from them, team meetings are regular, and all staff have an opportunity to discuss what is going on and get ideas from the rest of the team.

Supporting People funding:

No SP funding or Intensive Housing Management.

Challenging Behaviour/ASB:

We have seen a rise in ASB and drug and alcohol issues. Once a case is open for ASB because we have a specialist officer who supports the ILO on the scheme it means that there is consistency in it being dealt with and support for the officers, visits can be made in pairs. If a resident raises a concern or mentions an issue we can advise of the process and what we need them to do and that we can offer anonymity. Where we have residents with alcohol issues we liaise with carers and any support that is in place. We have had a resident who was drunk regularly and sleeping indecently in the communal lounge, residents complained to us as they were cross, we worked with the person, their family and ASC and the situation has resolved itself.

Cleaning:

Cleaning staff are contactors. Hours depend on the size of the scheme. Schemes with predominately bungalows and small communal areas only once a week. Bigger schemes – usually mornings.

Heating:

All the properties under the ILO and Extra care services have gas heating. We will be affected by the Heat Network Regulations.

Community alarm monitoring: Forest Care

Alarm Equipment/Digital Switchover:

We have now completed the change to digital and are just ironing out the last of the teething issues.

Independent living schemes have Tynetec and the extra care has Tunstall.

Grounds Maintenance:

Contractors

Resident Involvement:

We are signed up with the TPAS national standards and we have a Residents' Charter that has been drawn up by the residents themselves. It is due to be relaunched this year, and this is the 3rd year since its inception.

Scheme Activities:

Residents have regular coffee morning at some of the schemes and there is quarterly focus groups held at each scheme . Some schemes have seated exercise classes; these are funded by the council for the residents. There are occasional one-off events, we have had a funded ice cream truck visit, visits from choirs especially around festive season. There have been visits by singers, and a community theatre. There are some groups that are arranged by residents for residents, we have a group who meet on a Sunday to undertake arts and craft sessions. Some of the equipment in the initial outlay was funded by the Council. The staff put up posters to advertise the events and do help to organize the lounges to facilitate events.

Pets Policy:

In Independent living schemes pet ownership is managed on a case-by-case basis. Permission must be granted to keep a pet in these schemes. The primary difficulty is the requirement for the pet to be cared for in case of owner's absence – for example an extended stay in hospital. We take the animal's welfare very seriously. It is expected that upstairs flats would be limited to indoor cats or caged birds rather than dogs. Dogs in ground floor flats are required to have an enclosed outdoor space that they can use. Priority is given to service dogs. We have had some issues, particularly with dogs barking, this causes distress to other residents on the scheme. There has also been an issue in one scheme where an accusation of dog excrement being thrown into a resident's garden has been a challenge to investigate.

Infestations:

Infestations depend on if it is a single property that is affected, in which case it is the responsibility of the resident. However, if it is a scheme-wide issue then that is put to our local pest control company, which would be funded through the service charge.

Decarbonisation and Net Zero:

The extra care facility has a very thermally efficient building as well as a large solar panel array on the roof which helps to offset the costs of electricity.

Communal Lounges:

Our communal lounges are sometimes underutilised. We have a scheme that uses the communal lounge for a lunch club which is an external group. It did cause some friction with residents because of parking issues. The scheme has limited parking which does get abused by a local nursery and people attending the lunch club. LA did draw up a set of guidelines for use of the facilities in this specific instance. We don't have any written

guidance for general use of communal lounges. They have been used for resident's birthday parties, mainly on significant birthdays and for occasional fish and chip night, again for residents. The communal lounges in some schemes are used for seated exercise classes which are provided by an external trainer for residents.

Guest Bedrooms:

The independent living schemes charge £15 per person per night, and the extra care scheme charges a flat rate of £25 per night. The charges go into the revenue stream.

White Goods:

No white goods are supplied in the Independent living schemes, white goods are supplied in the extra care scheme – built in fridge freezer and oven and hob. No washing machines are provided in the extra care unit although there are commercial washing machines on site. The fridge freezer that is built in are currently being replaced if they cannot be repaired.

Mobility Vehicles:

We have very few schemes with dedicated scooter storage. We are just embarking upon a piece of work to establish which residents have scooters, where they are storing them and to ensure that they have insurance. The number of scooters is increasing, and scooter storage will prove an ongoing issue. Our planned maintenance team are going to start a review on mobility scooter storage.